



Services

Personalized, scaled and confidential

Annual Retainer

Comprehensive, advising and grantmaking services, comparable to the role of a family foundation executive director, to include:

Planning & Strategy:

- Regular meetings
- Past giving review & analysis
- Mission statement, guidelines and criteria
- Grantmaking strategy and timeline
- Decision making process and governance

Implementation Phase:

- Request for Proposal management
- Identification of prospective grantees
- Site visits and selection
- Funding recommendations
- Grant disbursement and follow-up

Ongoing:

- Progress review
- Modify plan as needed
- Annual gift review and guidance

Philanthropy 101: Educating the next generation

Fun, interactive workshops and/or one-on-one sessions with youth ages 14-30 designed to teach the fundamental principles of philanthropy to the next generation. Activities may include group discussions, site visits, guest speakers and organization analysis. *(Sessions and age-appropriate activities for children age 6+ also available.)*

Family Workshops: Strategy, mission & common ground

Customized workshops (1-2 days) for multigenerational families and family foundations with a desire to focus, educate, energize, and engage family members. Format varies but may include: guided discussions, videos, guest speakers, and exercises.

Past Giving Review & Analysis

Review past grants and develop a new giving strategy to increase the impact of your giving in the core areas you care about most.

Non-Profit Search & Match: Align giving to core values

Learn about and connect with local organizations that match your interest areas and reflect your values. Includes an initial consultation and an in-depth profile of each organization recommended to you by Sound Philanthropy.

Mission Statement: Focus your giving for increased impact

Explore values, life experience, and issue areas, as well as review past giving, to create a mission statement and develop criteria to guide future grantmaking making and more effectively evaluate impact.

Philanthropic Plan In Action: Strategy and implementation

Work from a defined mission and criteria to implement your philanthropic plan: Sound Philanthropy will research prospective grantees, manage a *Request for Proposal* process, review grant requests, conduct site visits, analyze candidate organizations, recommend funding options, and evaluate impact.