

Supporting Organization Service Offerings

Services Offered	Basic Management Services	Customized Management Services (additional fee)
GENERAL		
Quarterly basic financial statements	✓	✓
Inclusion under Foundation's 501(c)(3) public charity status	✓	✓
Foundation staff board member - required	✓	✓
Foundation staff liaison	✓	✓
IRS 1023 application - required	✓	✓
Drafting of bylaws and articles of incorporation - required (separate fee)	✓	✓
Inclusion in Foundation's consolidated financial statements - required	✓	✓
BOARD		
Retain board minutes and other corporate documents	✓	✓
Drafting and compilation of board minutes and resolutions		✓
Scheduling board meetings		✓
Recruitment and orientation of committees		✓
MARKETING		
Listing on the Foundation website	✓	✓
Assistance with marketing grantmaking cycles		✓
Separate website for information and grantmaking		✓
Assistance with identity items (logos, stationary design, business card design)		✓
Assistance with press releases		✓
Assistance with marketing materials		✓
Create web page and content on Foundation's website		✓
Create and design annual report		✓
Key messaging session		✓
Design and implementation of events		✓
PHILANTHROPIC PLANNING		
Values and interest exploration		✓
Facilitated philanthropy strategy sessions with wealth advisors		✓
Development and implementation of strategic philanthropic plans		✓
Facilitated family meetings		✓
Family timelines, genograms and family trees		✓
Development of mission and vision statements		✓
Preparation and management of philanthropic budget		✓



Supporting Organization Service Offerings *(continued)*

Services Offered	Basic Management Services	Customized Management Services <i>(additional fee)</i>
GRANTMAKING		
Establish a donor-advised fund for grantmaking	✓	✓
Provide and process applications		✓
Access to online reviewer's portal (self-print)		✓
Process grants		✓
Nonprofit site visits		✓
Access to Community Foundation's library of nonprofit and issue reports		✓
Customized nonprofit organization assessment and evaluation reports		✓
FINANCE & HR		
Establish bank accounts		✓
Accounting services for expenses, grants, cash receipts, stock, and oversight and management		✓
Processing and oversight of monthly back/investment reconciliation, journal entries and budget reporting		✓
Coordination of audit and tax and preparation of audit schedules, financial statements and tax returns		✓
Audit - required		✓
IRS 990 filing - required		✓
Operations support		✓
Error and Omissions Insurance - required		✓
Control, processing and oversight of payroll services		✓
Benefits and compensation administration		✓
Human resources policy set up and management		✓
Onboarding new employees		✓
Misc. HR: payroll processing fees, drug screens, background checks, COBRA administration		✓
Ongoing HR support		✓
IT		
Establish IT purchasing and protocols		✓
Ongoing IT support		✓
Server access		✓
IT security		✓
FACILITY/OPERATIONS		
Identification and maintenance of office space		✓
Insurance needs assessment and RFP		✓