

CFU**United**

All-In The AdNet, Comma and ProNet Conference

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Doing More with Private Foundations

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Who are we talking about?

- Family Foundations
- Corporate Foundations
- Government Initiatives
- Legal Settlements

What are we talking about?



Buffalo | Importance

- 600 private foundations in eight county region
- Significant philanthropic capital
- Potential impact on 1.5 million people
- Relationships open doors of opportunities

Buffalo | Strategies

- Multiple Strategies
- Four Strategic Foci
 - Revenue
 - Relationship
 - Influence
 - Capacity

Buffalo | Services

- Customized Services for Diverse Clients
 - External Funds vs. In-House Funds
 - Family Foundations vs. Government Entities
- Cross-Functional Teams
 - Relationship Manager
 - Project Manager

Buffalo | Onward

- Nurturing relationships
- Creating larger impact in the community
- Opportunities to involve “now” and “next” generations
- Extending philanthropic history, ideals and ideas

Cincinnati | Services

- Strategic Design and Focus
- Grant Management and Administration
- Board Meeting Coordination and Support
- Recordkeeping and Reporting
- Accounting and Tax Preparation Coordination
- Communication and Marketing

Cincinnati | Approach

- Client-focused approach to create a scope of work
- Source the best GCF talent to deliver on the scope
- Regular check ins to ensure alignment
- Pricing short-term and long-term

Cincinnati | Lessons Learned

- Engage all departments of the foundation
- Don't assume clients' needs or expectations
- Systematize the relationship management process
- Embrace a growth mindset