



2017 Corporate Partnership Opportunities

**exponent
philanthropy**

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Elevate Your Leadership Position by Supporting the Nation's Largest Philanthropic Association

Exponent Philanthropy is the **country's largest association of funders**—more than 2,000 members strong—and the only one dedicated to serving foundations with few or no staff, philanthropic families, and individual donors.

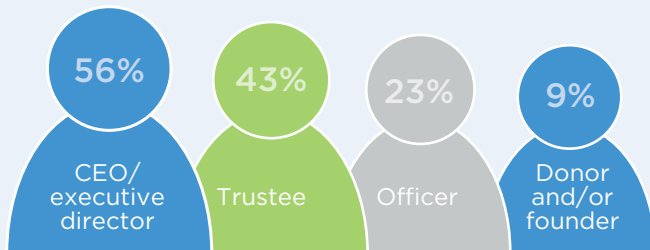
Our vibrant network has in common lean operations and **a style of philanthropy motivated by personal passion, community needs, and the strong desire for better outcomes**. We provide high-quality and cost-effective programs, resources, and connections that maximize our members' dollars and time for the benefit of diverse communities and causes.

“Our partnership with Exponent Philanthropy gives us the opportunity to stay current on industry information and trends while sharing our knowledge with a very engaged membership base.”

Nina Cohen, Director, Endowment and Foundation Advisory, Glenmede; Platinum Level Sustaining Partner

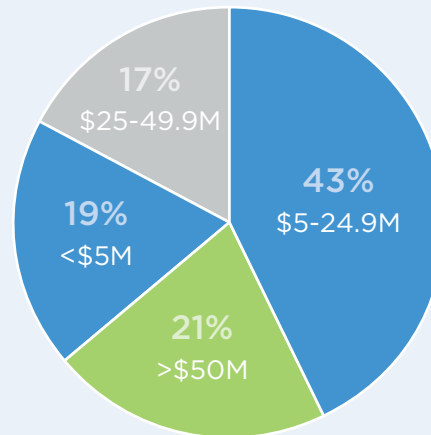
EXPONENT PHILANTHROPY MEMBER SNAPSHOT

4,000+ contacts/2000 members
STEWARDS more than \$77 billion
AWARDS approximately \$4 billion annually
FUND locally, nationally, and internationally



AUDIENCE BY ROLE

Individuals may perform multiple roles



AUDIENCE BY ORGANIZATION ASSET SIZE

2017 Partnership Opportunities

Our partnership opportunities offer a wide range of benefits and an unparalleled chance to showcase your expertise before the largest segment of the philanthropic community: **those who give with few or no staff.**

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Master Juggler Executive Institute

Next Gen Fellows Program

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990-PF Tax Seminar

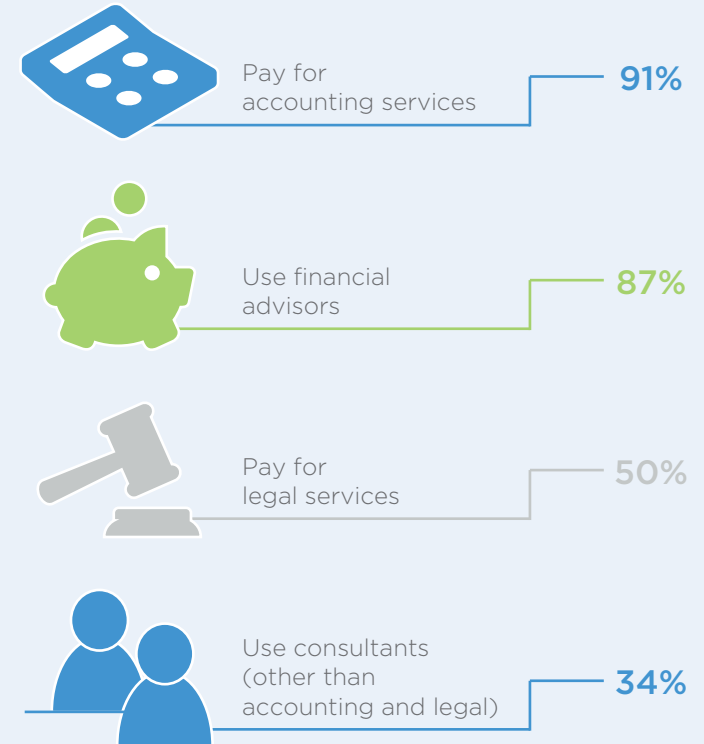
Legal Essentials

Local Engagement Group (LEG) Programs

Other Local Programs

Customized Advisor Education

AUDIENCE BY USE OF CONSULTANTS



Sustaining Partnership Program

A Partnership Level to Match Your Desired Impact

Support Exponent Philanthropy's mission while showcasing your brand and expertise in multiple ways throughout a two-year period. We strive to **create customized, mutually beneficial, and longstanding partnerships** with key stakeholders in the philanthropic community.

BENEFIT HIGHLIGHTS

- **Strong relationships** with various professionals who serve funders, resulting in more business referrals
- **Prominent placement** in Exponent Philanthropy's faculty pool for events and educational programs
- **Deeper relationships** with Exponent Philanthropy's members and other philanthropic leaders
- **Enhanced position** as a thought leader and expert in the philanthropic sector
- **Budgeting ease** and predictability
- And additional benefits, including **customized benefits** to meet your unique business goals

FOUR LEVELS TO MATCH YOUR GOALS



Platinum Sustaining Partner

\$50,000/year



Gold Sustaining Partner

\$25,000/year



Silver Sustaining Partner

\$10,000/year

Sustaining partnerships require a two-year commitment payable in two annual installments. Benefits may be customized depending on business goals and level of support.



Professional Partner

\$2,500/year

For firms with 5 or fewer principals or director-level equivalents (two-year commitments are rewarded with a 10% discount); or \$750/year for sole practitioners.

“The excellent relationship we have with Exponent Philanthropy is the result of our matching values and a ‘roll up your sleeves’ attitude that focuses on client success. Their conferences, workshops, learning materials, and focus consistently help their members get things done and make an impact. We regularly suggest Exponent Philanthropy to our clients as their ‘go to’ source when they are striving to do their philanthropy better.”

**Daren Nordhagen, President & CEO,
Foundant Technologies;
Platinum Level Sustaining Partner**

2017 CONNECT Conference

DENVER, CO OCTOBER 15-17, 2017



Our largest conference of the year, the **2017 CONNECT Conference** will bring together the Exponent Philanthropy community for **two and a half days of deep learning and networking**. CONNECT offers a safe, empowering space to build critical skills and knowledge while forming real, lasting relationships with peers and other experts in philanthropy.

CONNECT participants are eager to engage with thought leaders in philanthropy, making this event one of the **highest-impact opportunities** to engage with our audience.

Sponsorship packages and exhibit booths are available.

Please contact Andrea Clay for additional information.

“It is a pleasure to be associated with Exponent Philanthropy because of the quality and responsiveness of their work with foundations and corporate partners. Exponent Philanthropy staff assists a diverse universe of foundations and corporate partners, and remains on point, fair, timely, and helpful. We enjoy working with another organization focused on bringing value to its stakeholders.”

Lindalee Lawrence, President, Lawrence Associates; Professional Partner

Engage With Exponent Philanthropy Members

Affiliate your brand with one of Exponent Philanthropy's Signature Programs, each with **unique and powerful outreach opportunities**.

DIRECT MEMBER ENGAGEMENT

MASTER JUGGLER EXECUTIVE INSTITUTE

Exponent Philanthropy's Master Juggler Executive Institute is a carefully crafted six-month program **for those in the most senior staff role at their foundations**. This peer learning cohort features focused leadership training, executive coaching, customized learning, and ongoing support. Sponsorship of this program demonstrates a commitment to elevating the entire field of philanthropy.

NEXT GEN FELLOWS PROGRAM

Exponent Philanthropy's sell-out Next Gen Fellows Program has **a strong reputation for nurturing philanthropy's next generation of leaders**. A six-month training fellowship for up to 25 participants ages 18-35, all who are involved in foundations as trustees or staff, the program offers high visibility and enables a partner to **reach a unique audience of current and future foundation decision makers**. This program includes a mix of in-person trainings, virtual learning, and mentorship.

COACHING FOR EFFECTIVE PHILANTHROPY

The Coaching for Effective Philanthropy program **translates popular business coaching skills to the field of philanthropy**. This peer learning cohort enables funders to develop more authentic relationships and help others to gain awareness, discover new ways of thinking, and focus their energy on creating solutions.

Sponsors have the opportunity to partner with Exponent Philanthropy to shape, deliver, and champion this program that elevates the field of philanthropy.

THOUGHT LEADERSHIP

ANNUAL BENCHMARKING STUDY

Exponent Philanthropy surveys its members annually on compensation and benefits. The resulting report, which **includes some of the most sought-after data in the field**, is distributed to all Exponent Philanthropy members and others in the philanthropic sector. **The report is an invaluable resource for benchmarking data** on foundation operations. Sponsors have the opportunity to provide content in the report highlighting their thought leadership.

ESSENTIALS

Published twice each year, *Essentials* is **a high-value resource and a leading opportunity to reach your target audience**. Each issue focuses on a theme with content from Exponent Philanthropy members, colleagues, and staff. The *Essentials* sponsor will receive name recognition on the cover and the opportunity to place a full-page ad.

“The great thing about Exponent Philanthropy is that they work at the grass roots. People new to philanthropy or facing new challenges can talk to peers who have already been there to learn and share ideas.”

**Henry Bromelkamp, President,
Bromelkamp Company LLC;
Silver Level Sustaining Partner**

One-Day Seminars and Local Programs

990-PF TAX SEMINAR

January 24 | Washington, DC

Designed for anyone who prepares or signs a Form 990-PF, participants benefit from line-by-line guidance on the form and its recent changes, information on the 5% payout requirement and expenditure responsibility, and the **opportunity to ask questions of experts** who have deep experience in 990-PF preparation. This is a consistently popular program among members, including some who repeat the seminar.

LEGAL ESSENTIALS

Spring 2017

This daylong seminar will **lay the groundwork on legal issues for foundations**, providing practical tools as well as enough theoretical information to help participants understand what they must do to stay legal—and why. This seminar is presented in four modules allowing for sponsorship of the entire program or individual modules.

LOCAL ENGAGEMENT GROUP (LEG) PROGRAMS

Exponent Philanthropy manages Local Engagement Groups (LEGs) in nine regions to **foster local connections among members and other funders**. They are led by member volunteers and supported by Exponent Philanthropy staff. Each LEG

meets 3-4 times per year, and programming is driven by local members. Host a LEG program to build more local connections and good will. Exponent Philanthropy will work with LEG sponsors to ensure content and format are consistent with the LEG's goals.

OTHER LOCAL PROGRAMS

Exponent Philanthropy has several educational programs at the ready to present locally **in partnership with a sponsor**. Sponsors will serve as hosts—providing a venue, food, and beverage—and will invite their clients to attend. Exponent Philanthropy will invite its local members and prospects in the area, lead program development, and provide logistical support.

CUSTOMIZED ADVISOR EDUCATION

Philanthropists who work with few or no staff make up the largest segment of the philanthropic sector. Their style of philanthropy is unique and their needs specialized. Exponent Philanthropy knows this important audience better than any other organization. We can develop **tailored programs for your internal team on a variety of philanthropy topics**, allowing them to better serve your clients. Programs may be tailored to your firm's needs and presented at your offices or remotely.

“I’ve been working with Exponent Philanthropy for 15 years. Their broad knowledge of foundations and the philanthropic community is unparalleled. We participate in many of their seminars and conferences and, each time, we walk away with renewed respect for the services and information they provide. They provide a forum for sharing ideas and a sense of community. They have a wealth of experience and knowledge that would benefit any foundation—large or small.”

Thomas Blaney, Partner, Director of the Private Foundation Practice, PFK O’Connor Davies, LLP; Silver Level Sustaining Partner

LET'S WORK TOGETHER

The opportunities described in this prospectus are a sampling of the ways Exponent Philanthropy works with corporate partners.

We welcome the opportunity to be creative and customize opportunities that advance your business goals while offering value to our members.

Please contact

ANDREA CLAY

to start the conversation.

aclay@exponentphilanthropy.org
(202) 580-6560

SAVE THE DATE



990-PF Tax Seminar

January 24, 2017 | Washington, DC



2017 CONNECT Conference

October 15-17, 2017 | Denver, CO



2018 National Conference

September 28-30, 2018
Philadelphia Marriott Downtown