

The need	How Exponent Philanthropy can help <i>*may involve additional fees</i>
<p>I'm interested in starting a foundation but don't know where to begin.</p> <p style="text-align: center;">OR</p> <p>I'm new to philanthropy and want to understand the basics.</p>	<ul style="list-style-type: none"> • <i>How to Start a Private Foundation</i> • Guidelines for developing a mission statement • <i>The Foundation Guidebook</i> • Foundation 101 Virtual Seminar series* • Q&A Service
<p>The administrative side of running a foundation is time consuming, and I don't want to reinvent the wheel.</p>	<ul style="list-style-type: none"> • Sample documents and templates • Sample job descriptions • Community Discussion Groups
<p>I need guidance on tax and legal issues.</p>	<ul style="list-style-type: none"> • <i>Filing the Form 990-PF</i> • 990-PF Tax Seminar* • <i>Legal Essentials for Small Foundations</i> • Legal Essentials Seminar* • <i>How to Avoid Self-Dealing</i> • <i>The Foundation Guidebook*</i>
<p>I want to increase the knowledge and impact of my board.</p>	<ul style="list-style-type: none"> • Guidelines for board recruitment and orientation • Sample board policies • 10-Minute Impact Assessment • <i>The Trustee Handbook*</i> • Trustee Essentials Seminar* • Practical Board Self-Assessment*
<p>I want to better understand and strengthen relationships with the nonprofits I fund.</p>	<ul style="list-style-type: none"> • <i>Understanding Nonprofit Financials</i> • <i>Investing in Nonprofit Leaders</i> • Guidelines for site visits • Philanthropy Lessons video series • Grantee and Applicant Perception Survey* • Funder-Nonprofit Toolkit (coming soon)
<p>I want to evaluate my foundation's impact.</p>	<ul style="list-style-type: none"> • <i>Getting to Impact Through Evaluation</i> • 8-part Discussion Guide series on achieving impact • <i>Making the Most of Your Giving</i> • Sample theories of change, evaluation plans, and results • <i>Foundation Operations and Management Report</i> • 10-Minute Impact Assessment
<p>I want to improve my foundation's grantmaking process.</p>	<ul style="list-style-type: none"> • <i>Basics of Proposal Review</i> • <i>Right-Sizing Your Requirements</i> • Sample grant guidelines, applications, agreements, evaluation forms, and award letters • <i>The Foundation Guidebook*</i> • Grantee and Applicant Perception Survey*

I need help developing an investment strategy.	<ul style="list-style-type: none"> • <i>Creating a Strategy and Plan for Your Foundations Investing</i> • <i>Program-Related Investments</i> • Sample investment policy statements • Guidance on selecting investment advisors • Directory of Foundation and Philanthropy Advisors
I want to engage my children in the foundation.	<ul style="list-style-type: none"> • <i>Teen Philanthropy Café</i> series • Guidelines on engaging youth in philanthropy • Next Gen Fellows Program*
My foundation is at a transition point and we need guidance on next steps.	<ul style="list-style-type: none"> • <i>Ramping Up Your Foundation</i> • <i>Succession Planning</i> • <i>Closing Shop</i> • Q&A Service • Directory of Foundation and Philanthropy Advisors
I'm looking for benchmarking data.	<ul style="list-style-type: none"> • <i>Foundation Operations and Management Report</i>
I want to connect with others who have knowledge and experience in running a foundation.	<ul style="list-style-type: none"> • Community Discussion Groups • Q&A Service • In-person educational programs*
I want to protect the foundation and minimize administrative expenses so funds can support grantees.	<ul style="list-style-type: none"> • Discounted insurance products through USI Affinity: <ul style="list-style-type: none"> • Directors & Officers Liability • Business Owner's Policy • Workers' Compensation • Cyber Liability
I want to research the non-profits I'm considering granting to.	<ul style="list-style-type: none"> • Discounts on GuideStar products to help with pre-grant due diligence: <ul style="list-style-type: none"> • Charity Check • Pro Search • Financial SCAN • Nonprofit Compensation Report • Discounts on NGOsource for members who grant internationally
I'm looking for health insurance and HR benefits for my staff.	<ul style="list-style-type: none"> • Discounts on HR services through TriNet