

# FOUNDATION MANAGEMENT SOLUTIONS

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The Minneapolis Foundation has a long history of partnering with generous individuals and families to make their giving go further. We understand what it takes to manage a private or family foundation—it's work we've been proud to do since 1915. Our services combine purpose-built technology, expert advice, and a customized approach that recognizes the unique needs of each partner we support. By handling the logistics of running your foundation, we'll free you up to focus on what matters most: The impact you hope to make in your community. We offer:

- The expertise of a professional staff, without the expense and headaches of hiring and supervising.
- A single-source solution for functions such as administration, tax preparation, and more.
- A scalable structure to support your foundation as it evolves and grows.
- Stability, so your foundation won't lose focus or data as it changes over time.
- User-friendly technology that makes it easy to track your philanthropic activity and collaborate with foundation members, no matter where they live.

## **A PARTNERSHIP TAILORED TO YOU**

Relationships are at the heart of our work: Every foundation we support is paired with a Philanthropic Advisor who serves as your guide to the Minneapolis Foundation's extensive resources and ensures your foundation receives the highest level of customer service. To develop a plan that works for you, we start by listening closely to understand your values, legacy, and desired impact. Then we'll work with you to create a personalized experience that achieves your foundation's goals.

Our philanthropic toolkit includes:

## **ADMINISTRATION AND BACK-OFFICE SUPPORT**

- Our online management system makes it easy for you to view your records, add to your charitable balance, analyze your grant history, and make grants. Our grant administration team will gladly research nonprofit organizations, conduct nonprofit due diligence, issue grant checks, and draft and monitor grant agreements. For larger grants, we can help you structure and issue Requests for Proposals, then facilitate review and decision-making about proposals.
  - Our team of professionals oversees investment management, ensuring top-notch stewardship of your charitable assets.
  - Through programs like InvestMPLS, we provide opportunities for you to make Program-Related Investments that strengthen our community.
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## COMMUNITY EXPERTISE

- Our staff has deep expertise in issues such as racial and economic justice, criminal justice reform, and educational opportunity. We can also connect you to new and emerging organizations that align with your foundation's existing funding priorities.
- We host convenings where you can learn, build relationships, and take action on issues you care about. These gatherings (both in person and virtual) are opportunities to hear from our staff and other innovative nonprofit and community leaders about pressing needs and innovative solutions.
- Our staff can also work with your foundation to create a grantmaking scoring framework, assist with evaluation, prepare funding recommendations for board review, and manage relationships with grantee organizations.



## FAMILY ENGAGEMENT

- Our Family Philanthropy Resource Center provides support around the unique opportunities that families encounter when they give together. We offer meeting facilitation and tools to help families engage younger generations in giving, determine roles and budgets, navigate life changes such as marriage or retirement, and transform tricky conversations about money into opportunities to explore and transmit family values.
- Our Philanthropic Advisors are experts in charitable legacy planning, including estate plan integration and next-generation succession planning.
- Our Fourth Generation program provides opportunities for younger generations to build philanthropic skills and learn from peers. We can also introduce you to other generous families and funders in the community.

# Choose Your Level of Support

Our relationship model is highly customized, recognizing that every foundation has unique needs and goals. Explore our menu of services:

SERVICES	CHOOSE YOUR OWN SERVICES	BACK OFFICE ONLY	FULL SUPPORT	CONVERSION TO A DONOR ADVISED FUND
Accounting and auditing	<input type="radio"/>	•	•	NA
Online records management	<input type="radio"/>	•	•	•
Recordkeeping	<input type="radio"/>	•	•	•
Financial reporting	<input type="radio"/>	•	•	NA
Grants management	<input type="radio"/>		•	•
Grantmaking compliance	<input type="radio"/>	•	•	•
Investment management	<input type="radio"/>	NA	NA	•
Investment consulting			•	NA
Investment alliance	<input type="radio"/>			•
Tax preparation and filing	<input type="radio"/>	•	•	NA
Compliance monitoring for 501(c)(3)	<input type="radio"/>		•	NA
Foundation administration	<input type="radio"/>		•	•
Guidance and consulting	<input type="radio"/>		•	NA
Marketing and communications	<input type="radio"/>		•	•
Information technology	<input type="radio"/>		•	•
Facilities management	<input type="radio"/>		•	NA
Innovative programs	<input type="radio"/>		•	•
Legacy planning	<input type="radio"/>		•	•
Fund statements / investment reports	<input type="radio"/>		•	•
Annual report	<input type="radio"/>		•	•
Family philanthropy tools and support	<input type="radio"/>		•	•
Grantmaking advice and research	<input type="radio"/>		•	•
Facilitation of family meetings	<input type="radio"/>		•	•
Invitations to investment briefings	<input type="radio"/>		•	•
Formal, facilitated RFP process	<input type="radio"/>		•	•
Customized letterhead, check stock, and review of grant transmittal letters	<input type="radio"/>		•	•