

FOUNDATION SERVICES

We have a team that specializes in providing services to external private foundations for various levels of philanthropic giving.

We will ensure that your charitable investment provides you with the greatest emotional, civic and financial benefit possible. Our foundation services include:

Vision and Strategic Development

Our team works directly with you to develop or update the purpose of your charitable giving, as well as identify and prioritize your areas of interest. Based on what is important to you, we highlight community issues and help you formulate strategies to respond to these needs. In addition, we provide ongoing evaluations of your funding and ensure that the intent of the fund is fulfilled.

Grantmaking Activities

Through the grantmaking process, our team can manage the day-to-day activities of your charitable giving by providing a wide range of services that include, but are not limited to, the following:

- Field phone calls and correspondence from grant seekers.
- Identify qualified and appropriate applicants.
- Receive and review all grant requests.
- Make site visits when appropriate to examine program concept or agency capabilities.
- Maintain a database of all grant requests, grant awards and status.
- Determine if a gift will qualify as a charitable contribution.
- Assist grantees individually in developing and refining their grant request.
- Prepare written grant recommendations.
- Prepare and send award letters (including formal terms and conditions agreement, payment schedule and reporting procedures) and notify the organizations whose proposals are denied.
- Process and verify grant payments.

Grantee Accountability

The purpose of grantee accountability is to ensure that your grant dollars are being used for their intended purpose and are having an impact in the community. We provide accountability oversight in the following ways:

- Maintain a grant reporting schedule for each grantee.
- Notify grantees of the need to submit reports.
- Monitor progress of grants and make site visits when required.
- Report on any deviations in grant use, problems or recommendations for termination because of misuse of grant funds.
- Provide technical assistance and/or troubleshooting on grants experiencing difficulty.
- Prepare written annual evaluations of major grant projects (based on information provided by grantees or by outside evaluators hired to monitor programs).

Administrative Support

Our team can provide administrative support to complement our other foundation services and assist you in your philanthropic activities. These services include general file management, scheduling and coordination of meetings, and other administrative items.

Foundation Services are available on a contractual basis.

If you are interested in learning more, please contact our Donor Services at 661.616.2617 or donorservices@kernfoundation.org.