



APPENDIX III

ADDITIONAL RESOURCES

For additional information about any of the following resources, please contact the National Center at 202.293.3424 or by email at ncfp@ncfp.org.

Books

Exemplary Grantmaking Practices (Furnari, Mollner, Odendahl and Shaw). This guide provides examples of effective strategies for communications and relations with grantees, organizational effectiveness, decision-making, and other activities. National Network of Grantmakers: San Diego, CA, 1998.

Family Advisor Packet: Mission and Guidelines. This information packet includes sample mission and guidelines statements, as well as articles from peers. Council on Foundations: Washington, DC, 1995.

Grantmaking Basics: A Field Guide for Funders (Barbara D. Kibbe, Fred Setterberg and Colburn S. Wilbur). This manual provides insight and advice on a variety of grantmaking activities, including site visits, proposal review, and preparation for board meetings. Council on Foundations: Washington, DC, 1999.

Grantmaking with a Compass: The Challenges of Geography (Deanne Stone). This monograph uses the stories of over 20 families to describe how families have dealt with issues of geographic dispersion, including defining a mission that accommodates individual interests and needs of different communities. National Center for Family Philanthropy: Washington, DC, 1999.

Inspired Philanthropy: Creating a Giving Plan (Tracy Gary and Melissa Kohner). This interactive workbook is designed to help individual donors use their values and ideas to create a giving plan for themselves. Includes a variety of user-friendly charts, checklists and other guides. Chardon Press: Berkeley, CA, 1998.

Small Can Be Effective (Paul N. Ylvisaker). This monograph describes twenty “generic functions” of philanthropy for small foundations in four categories: financial, catalytic, conceptual and community building. Council on Foundations: Washington, DC, 1989.

The Trustee Notebook: An Orientation for Family Foundation Board Members (Robert Hull). What are the rules that govern trustees of private foundations? What is the process for making good grant decisions? How can new family trustees find and define their role in the activities of the foundation? These are just some of the questions that are addressed in this guide for the new family trustee. The manual’s design allows you to create a basic trustee orientation handbook by including the governance and management documents of your own foundation. National Center for Family Philanthropy: Washington, DC, 1999.

Voyages of Discovery: A Planning Workbook for Philanthropic Families (Judith K. Healey). This workbook provides a framework and map for families thinking about the future of their giving programs. It includes sections on aspects of the planning process, how to manage the planning process, and putting ones plan into action. National Center for Family Philanthropy: Washington, DC, 2000.

Articles

“Family Meetings: Preparing for an Effective Family Foundation Discussion,” Jason Born, *Passages* essay series, National Center for Family Philanthropy, January 2000.

“Grant Guideline Ideas That Work,” *Association of Small Foundations Newsletter*, Fall 1998.

“Mission-Based Partnerships,” Lester A. Picker, *The Not-for-Profit Advisor*, Fall 1998.

“Strategic Philanthropy: The Concept of the Investor/Donor,” H. Peter Karoff and Melinda Marble, *Trusts and Estates*, June 1998.

“Some Big Questions at the Start: How does a New Family Foundation Choose its Focus Areas?”, Emily Hall Tremain Foundation Report, 1992-1995.

Common Application Forms

In addition to developing mission statements and guidelines to manage the grant-making process, many family foundations have developed application forms to help standardize the proposals they receive from potential grantees. Several regional associations of grantmakers have developed so-called “Common Grant Application” forms. These forms provide a standard application form for family foundations and other grantmakers, and at the same time ease the burden on grantees for filling out multiple proposals for funders.

Common grant application forms often include all the information that is needed by a family foundation. It is important that individual families review these forms closely to ensure that the information asked for is what they need to make efficient and educated grant decisions—while at the same time keeping in mind the impact of this decision on the nonprofits they fund.

A growing number of RAGs have developed these forms for their members and for other funders in the regions they serve. The following websites contain direct links to examples of some of these forms:

Associated Grantmakers (Massachusetts)

www.agmconnect.org

Connecticut Council for Philanthropy

www.Ctphilanthropy.org

Delaware Valley Grantmakers

www.dvg.org

Minnesota Council on Foundations

www.mcf.org

New York Regional Association of Grantmakers

www.nyrag.org

Philanthropy Northwest

www.pngf.org