

How Family Members Can Be Involved

- Serve as a trustee or board secretary (prepare board books, keep minutes, etc.).
- Serve as General Counsel.
- Serve as C.P.A. or help keep the books.
- Manage the grantmaking process (write checks, keep records, etc.).
- Administer the office or help answer the phone, reply to inquiries, etc.
- Advise on or manage the investment portfolio.
- Scout for charitable investment opportunities (program-related investments, low-interest loans to nonprofits, social venture capital collaborations, etc.).
- Take on communications responsibilities (help create a website, prepare a family newsletter, etc.).
- Serve on an Advisory Committee (for adult relatives or for members of the next generation) that can recommend grants, explore for new opportunities, accompany board members on site visits, etc.).
- Make financial contributions to the foundation endowment.