



Reducing the Administrative Burden through Fiscal Sponsorship Fundamentals of Family Philanthropy Webinar March 10, 2022

Description

Administration is often a hurdle to scaling impact. Because of this, an increasing number of donors are leveraging giving vehicles with less administrative burden and more legal, financial, and investment support. Fiscal sponsorships and other intermediary partners provide an option for giving families that want to build a philanthropic effort, but do not want to administer a separate entity for their giving. How do you determine if these structures are a good fit for your desired level of involvement and staffing? What are the different options, and what are some considerations when choosing your vehicle? Join us for a discussion on when and how best to leverage fiscal sponsors as a solution to effective family philanthropy.

Replay Link

View the webinar [replay here](#).

Resources

- [Boldly Go Philanthropy and accompanying slides](#)
Brief slides from Boldly Go Philanthropy that review the promise and burden of philanthropy, a list of considerations when deciding whether or not to outsource a philanthropic effort, and a list of services provided by Boldly Go.
- [Community Foundation Locator](#)
A searchable map of community foundations in the U.S. Candid also offers this [searchable directory](#) of community foundations around the world. Their fiscal sponsorship and outsourced service models and capacities will vary widely.
- [Family Philanthropy and Donor-advised Funds](#) (NCFP, 2019)
NCFP's online guide to how families and family foundations are choosing and using donor-advised funds.
- [Fiscal Sponsor Directory](#)
An online directory of fiscal sponsors, primarily for nonprofit and community projects, and publisher of the guidebook *Fiscal Sponsorship: 6 Ways To Do It Right*.
- [Going Beyond Grantmaking: Using External Help to Extend a Foundation's Core Competencies and Increase Its Impact](#) (Arabella Advisors, 2015)
Article about five ways grantmakers use intermediaries and five pitfalls.

- [Moore Philanthropy](#)
Yvonne Moore is the Founder and Managing Director of Moore Philanthropy, and President of Moore Impact.
- [National Network of Consultants to Grantmakers](#)
Membership organization of experienced consultants and firms. A few offer fiscal sponsor services and many offer outsourced professional services.
- [NCFP Operations & Management Primer and related resources](#) (NCFP, 2021)
NCFP's online primer and related resources that cover the fundamentals of operations and management in family philanthropy.
- [NCFP Impact Vehicles & Structures Primer and related resources](#) (NCFP, 2021)
NCFP's online primer and additional resources that outlines which giving vehicles and structures are available and a best fit for your family philanthropy effort.
- [Philanthropic Advising in the 21st Century](#) (Macklin, 2022)
A draft tool that assesses how – and in what stage of the NCFP Family Giving Lifecycle – philanthropic advisors are prepared to support their clients.
- [Philanthropy Resource Directory](#) (Giving Compass)
The directory includes a list of collaborative funds and intermediaries
- [Questions to Ask a Donor-Advised Fund Sponsor](#) (Macklin, 2021)
A checklist for interviewing and comparing sponsors of donor-advised funds.
- [Smarter Outsourcing for Grantmakers](#) (TCC Group, 2010)
White paper on why grantmakers choose to outsource functions and how they can best manage the relationships.
- [The Stigma Against Fiscal Sponsorship Needs To End](#) (Le, 2017)
Vu Le's shares a perspective on fiscal sponsorship.
- [Structuring for Impact](#) (Walton Personal Philanthropy Group, 2019)
Report on how 20 founders decided how to structure their philanthropic strategies using multiple entities and vehicles.
- [United Philanthropy Forum: Find Your Regional Philanthropy-Serving Organization](#)
Attendees can connect with their local/regional philanthropy association for additional resources and referrals to fiscal sponsor organizations. UPF maintains this list of region PSOs.
- [The U.S. Trust Study of the Philanthropic Conversation: Understanding Advisor Approaches & Client Expectations](#) (U.S. Trust and TPI, 2018)
Study on client expectations and advisor approaches to philanthropic services.

Access more resources through NCFP's [Knowledge Center](#), and see [upcoming events and programs](#).

Featured Speakers



Tony Macklin, a Chartered Advisor in Philanthropy®, consults with donor families, grantmakers, and their advisors about purpose, use of resources, action planning, and learning. As executive director of the Roy A. Hunt Foundation, he facilitated changes in visioning, impact investing, grantmaking, trustee education, and back-office management. In twelve years at the Central Indiana Community Foundation, he led grantmaking initiatives, advised wealthy donors, attracted \$39 million, and launched a social enterprise. Tony currently serves as program manager for the NCFP’s [Community Foundations Family Philanthropy Network](#). He also serves as a senior advisor to the Impact Finance Center and peer reviewer for *The Foundation Review*.



Yvonne L. Moore is the Managing Director of Moore Philanthropy and President of Moore Impact, the firm’s exempt arm. She brings to this work over 25 years of experience in the government, civil society, and philanthropic sectors providing strategic and tailored philanthropic advisement and solutions to families, individuals, foundations and corporations.

Prior to launching Moore Philanthropy, Yvonne was the Chief of Staff to filmmaker and philanthropist Abigail E. Disney where she oversaw the family’s network of media, philanthropic and advocacy organizations.

With the launch of Moore Philanthropy, Yvonne and her team work with clients to help advance their philanthropy in a way that makes sense for them and the communities they seek to serve, whether they choose to use traditional grantmaking or more complex social investment vehicles.

Yvonne has spoken, lectured, moderated conversations, curated programs and written on the topics of philanthropy, diversity in philanthropy, family and next generation philanthropy, the philanthropic ecosystem and African Diaspora philanthropy for New York University, Alliance Magazine, Yale University Philanthropy Day, London School of Economics Africa Summit, the Africa Philanthropy Forum, the Global Philanthropy Forum, Africa Grantmakers’ Affinity Group, the Africa Centre on Philanthropy and Social Investment, the National Center on Family Philanthropy, Philanthropy New York and the Worldwide Initiative for Grantmaker Support (WINGS).

Yvonne holds a BA from Texas Tech University and a MS in Nonprofit Management from the Milano School of International Affairs, Management, and Urban Policy at the New School. She has completed post-graduate studies in democracy and civil society at the University of Cape Town, and nationalism, post-conflict violence and gender at the University of Lower Silesia in Poland. Yvonne serves as a trustee of The Daphne Foundation, the New York Women’s Foundation, and the Africa Grantmakers’ Affinity Group. She is a trustee of Comic Relief USA, where she chairs the foundation’s grant making committee, and is on the Steering Committee for the Black Resilience in Colorado (BRIC) Fund. She is also an advisor to the Accountability Council, Jola House Liberia and the Periwinkle Initiative.



Kyle Peterson is co-founder and Managing Partner at Boldly Go Philanthropy, a philanthropic advisory and support firm that serves leanly staffed foundations, individuals, and families. Before launching Boldly Go, Kyle led all philanthropic activities on behalf of the multi-generation Walton family, including serving as the Executive Director of the Walton Family Foundation. In this role, he oversaw one of the nation's largest private foundations to support \$600 million in annual grant making and provided support to the family's individual philanthropy. Prior to his tenure with the Walton family, Kyle launched and led FSG, a global consulting firm. During his tenure at FSG, Kyle led over 150 consulting engagements for foundations, companies, and nonprofits and served on FSG's Board of directors. Prior to FSG, Kyle was

a country director in Zimbabwe and Rwanda for Population Services International, a consultant with Monitor Consulting, and a Peace Corps volunteer in Sierra Leone. Kyle holds an MBA from the McCombs School of Business and an MPA from the LBJ School of Public Affairs (University of Texas) and a BA in International Studies from the American University.