

The 5-Point Private Foundation Checkup

Ready to see how your foundation is doing? Use this handy checklist to mark off the activities as you complete each of the five steps.

1. Review Your Mission Goals and Historical Giving	WHAT TO DO	COMPLETE
Guidelines for Crafting a Private Foundation's Mission Statement	Use this resource to learn about best practices in setting and evolving your mission.	<input type="checkbox"/>
Reimagining Philanthropy for the 21st Century—Replay	Watch this webinar to get tips from experts at Trust-Based Philanthropy and Modern Grantmaking.	<input type="checkbox"/>
2. Review Your Grantmaking Portfolio for Balance	WHAT TO DO	COMPLETE
Charity Search in Impactfully Select	See how Impactfully Select makes it easier than ever to find the right charities to fulfill your mission.	<input type="checkbox"/>
Adapting Your Grant Approach Series: Tips for Funding Returning Grantees	Read our tips on some changes to consider in your funding application process for returning grantees.	<input type="checkbox"/>
Adapting Your Grant Approach Series: Tips for Giving to Different Types of Organizations	Checkout our blog series, starting with best practices for giving to large institutions.	<input type="checkbox"/>
3. Review Your Foundation's Grantmaking Personality	WHAT TO DO	COMPLETE
What's Your Philanthropic Personality?	Review this resource to understand how your personal motivations can help you identify the right grantee partners.	<input type="checkbox"/>
Why Philanthropic Motivation Matters	Read this blog on the primary reasons philanthropists give to understand how this can shape your foundation's goals.	<input type="checkbox"/>
What Type of Funder Are You?	Take our short quiz to learn about 7 different approaches to giving.	<input type="checkbox"/>
4. Review Your Foundation's Operations	WHAT TO DO	COMPLETE
Foundation Operations Worksheet	Use this worksheet to bring your team together and create an operational framework.	<input type="checkbox"/>
How to Manage Members and Permission Levels	Watch a demo of how to easily manage members and permission levels with Impactfully.	<input type="checkbox"/>
5. Review Your Foundation's Technology	WHAT TO DO	COMPLETE
Is Your Tech Stack Undermining Your Philanthropic Impact?	Take this quick assessment to see the vulnerabilities in your tech solutions.	<input type="checkbox"/>
Foundation Management Platform Buyer's Guide	Keep this buyer's guide close as you complete your vendor research.	<input type="checkbox"/>

WANT TO LEARN MORE?

We're here to help! Call 800.839.0054 or send us an email at info@foundationsource.com.