

Directory of Philanthropy Consultants Glossary (rev. November 2013)

To Grantmakers:

This glossary explains the terms used by NCCG's online Directory of Consultants to define areas of professional expertise, type of grantmakers served and geographic focus. Use it to choose search terms that can help you identify the expertise you seek. This glossary is *not* a comprehensive overview of services. Please view Directory profiles and contact consultants listed for a fuller picture of services available.

Philanthropy Consultant Professional Expertise

Board of Directors, Governance Issues

Structures, policies, systems and planning to achieve highly effective governing boards. Also composition and engagement of board members.

Communications, Marketing

Communication planning, branding, marketing strategy, and public and media relations.

Compensation, Executive Search, Human Resources

Executive compensation strategy and planning; incentive compensation planning and compliance; executive recruitment; HR matters and outsourcing.

Corporate Social Responsibility

Integration of positive social causes into business practices.

Evaluation

Planning and conduct of assessments of interim or final project results using quantitative and qualitative methods. Construction of theories of change and logic models. Assessments of fidelity to program models.

Executive Coaching

One-to-one support and development of leadership and management capacity for senior staff.

Facilitation

Planning and managing productive meetings, retreats, etc. that engage internal and/or external constituencies.

Family Dynamics

Building the performance and effectiveness of family members to work together to achieve philanthropic objectives.

Foundation Management

Comprehensive services such as interface with grantseekers, grant management, governing board and committee support, and office administration.

Fund Development

Fundraising strategy, campaign planning and prospect research for public, community and other foundations that raise funds for grantmaking and programs.

Grantmaking and Program Development

Grant program design and development; best practices; proposal review, site visits and recommendations.

Impact Investing, PRI

Relates to loans and other investments (as distinguished from grants) designed to achieve a grantmaker's philanthropic purposes and interests. (NCCG's Directory of Consultants is not a source of investment advice.)

International Grantmaking

Policies and procedures related to compliance with requirements governing international grants. Design of international grantmaking programs and partnerships with local NGOs.

Leadership Transition, Succession Planning and Leadership Development

Support and planning to facilitate senior-level staff transitions and growth.

New Foundation Development

Mission, governance, program and organizational structure related to foundation start-up

Next Generation Issues

Building effective engagement of younger generations in foundation decisionmaking. Includes trustee succession planning. Also refers to building high capacity donors ages 21 to 40.

Partnerships, Collaborations

Design, strategy, facilitation or management of multi-funder or multi-grantee projects.

Project Management

Conduct of a specific grant program or initiative.

Public Policy

Planning and conduct of advocacy and other efforts to influence social policy.

Racial Equity, Diversity, Cultural Competency

Development of foundation policies and practices that promote cultural diversity, inclusiveness and sensitivity across cultures.

Research

Primary and secondary research to inform, examine or provide background on areas of grantmaker interest and current or future investment, including needs assessments and environmental scans.

Strategic Planning

Engagement of board and other constituencies to articulate a grantmaker's goals and the actions and resources required to achieve them.

Technology, IT

Technology-based solutions to support grantmaking, foundation management and communications.

Training, Curriculum Development

Designing and/or leading professional development for staff or trustees and learning opportunities for grantees.

Writing, Editing

For any print or electronic internal or external communication, including histories and donor intentions of grantmaking entities.

Types of Grantmakers Served**Community Foundations**

A tax-exempt public charity organized and operated as a permanent collection of endowed funds for the long-term benefit of a defined geographic area.

Community Philanthropy

A form of organized giving in which community members engage in decisionmaking and contribute their own resources to build an inclusive and equitable society.

Conversion Foundations

A type of private foundation formed from the sale proceeds of a tax-exempt entity, such as a hospital or health insurer.

Corporate Foundations and Corporate Giving:

- A company-sponsored, private foundation that derives its grantmaking funds primarily from the contributions of a profit-making business. The company-sponsored foundation often maintains close ties with the donor company, but it is a separate, legal organization.

- A corporate giving program (or direct giving program) is a grantmaking program established and administered within a profit-making company. Gifts or grants go directly to charitable organizations from the corporation.

Donor-Advised Funds

A fund held by a community foundation or other public charity, where the donor (or a committee appointed by the donor) may recommend eligible charitable recipients for grants from the fund.

Ethnic Funds

A focused fund or foundation that organizes philanthropic resources from multiple sources to primarily benefit a defined racial or ethnic group.

Family Foundations

A private foundation whose funds are derived from members of a single family. At least one family member must continue to serve as an officer or board member of the foundation.

Federated Funds

A public grantmaking charity whose purpose is raising operating and special initiative funds, largely through workplace giving, to be distributed to member and affiliated charities.

Focused Funders

Also called an identity fund or focus fund, a grantmaking organization created by people who are connected not just by location, but by shared experience and culture, such as race, ethnicity, gender, or sexual orientation.

Funder Collaboratives

Ad hoc or ongoing multi-funder efforts to develop strategy and coordinate or pool giving to address a particular issue.

Giving Circles

A pooled fund that makes grants and is managed by the fund's donors, who share a common interest in a social cause or issue. Giving circles allow for a wide range in charitable styles, philosophies and politics, structure, size, and focus through a very hands-on approach.

Government Grantmakers

Grant distribution programs operated by public sector entities that make awards primarily to public charities to carry out charitable purposes.

Grantmaker Associations, Affinity Groups, Funder Networks

A group of grantmakers that act collectively to support a particular population, region, interest, or other identifying characteristic. Includes regional associations of grantmakers.

Independent/Private Foundations

A tax-exempt organization that makes grants based on charitable endowments and is not controlled by the benefactor or the benefactor's family.

Individual Donors, Philanthropists

An individual or family who makes charitable contributions at significant levels over a sustained period of time, usually to the benefit of multiple organizations.

LGBT Funds

A focused fund or foundation that organizes philanthropic resources from multiple sources to primarily benefit and address issues affecting the lesbian, gay, bisexual and transgender community.

Operating Foundations

A private foundation that uses the bulk of its income to provide charitable services or to run charitable programs of its own. It makes few, if any, grants to outside organizations.

Public Foundations

A tax-exempt, nonprofit, publicly supported charitable institution whose primary purpose is grantmaking to multiple organizations and whose sources of annual support are a mix of private and public donations.

Religious Focus

A philanthropy that roots its grantmaking in formal religious values and traditions, and often directs its grantmaking to organizations that share an affiliation with its religious denomination.

Social Change Funds

A fund or foundation that focuses support on the advancement of disenfranchised constituencies.

Trusts

A formally created grantmaking trust which may be administered by a legal, financial or other institution.

Venture Philanthropy and Social Entrepreneurs

A philanthropy that applies practices of the venture capital world to invest deeply in nonprofits to build their capacity effectively. Venture philanthropists value donor dollars in terms of the social return of investment.

Women's Funds

A focused fund or foundation that builds women's philanthropic leadership, and raises financial resources and focuses its grantmaking on projects that benefit women and girls.

Geographic Focus**International**

For regional definitions: <http://geotree.foundationcenter.org/>

Global refers to programs and initiatives that are international in scope.

National (United States) refers to programs and initiatives that are national in scope.

For more information, contact the National Network of Consultants to Grantmakers at info@nncg.org or www.nncg.org.