



TCC Group Grantmaking *and* Foundation Advisory Services

Who *we* Are

As a mission-driven certified B Corporation, TCC Group partners with private, family, and corporate foundations as well as nonprofit organizations to listen, learn, and work to solve complex social problems, moving us towards a more equitable and just society. We recognize that every philanthropic institution is created with its own unique needs, goals, and perspectives, and our clients value TCC Group's individualized approach. Our team brings deep experience in diverse sectors and a collaborative approach to every project, enabling us to craft creative solutions to meet our clients' needs across a wide variety of fields, stages of development, and issues of interest.

What *we* Do

Philanthropic advising and strategic grantmaking have been core services at TCC Group for decades, allowing us to develop long-standing partnerships with our foundation clients and families. Our Grantmaking Services Practice has substantial experience and knowledge in creating, implementing, and managing responsive, equitable and dynamic grantmaking initiatives.

We provide strategic counsel around grants strategy and design; offer guidance on effective and trust-based grantmaking practices; provide expert advice on foundation governance policies and procedures and next generation engagement for families and family foundations; and regularly provide program officer support and/or complete management of the entire grants process.

Grantmaking Design *and* Strategy

We are committed to values of equity and inclusion and are passionate about helping clients define mission, vision, values, goals, and strategies that can lead to more focused, effective, and impactful grantmaking. Our grantmaking strategy design is centered on trust-based philanthropy principles and grounded in research to help funders leverage qualitative and quantitative knowledge, experiences, and data for insights. With strong issue-focused backgrounds and deep experience in philanthropy, our staff has the expertise to advise on grantmaking strategy, focus areas and grant portfolio recommendations. Services include:



- > **Refinement or development of Foundation vision, mission, goals desired outcomes, investment approaches, grantmaking materials and evaluation methods;**
- > **Foundation leadership or family member interviews to uncover philanthropic motivation;**
- > **Issue area research, environmental scans and/or landscape analyses;**
- > **Iterative listening processes, including community needs assessments, grantee interviews and focus groups; and**
- > **Planning consultations with Foundation staff or family members to apply learnings and create actionable frameworks, including theories of change and implementation plans.**

"TCC Group was able to zero in on critical feedback and allow The Rider-Pool Foundation, The Dorothy Rider Pool Health Care Trust, and our partners to look at a situation through a common lens. They were effective in helping us identify shortcomings and make adjustments to get important projects on track and moving forward." - Ron Dendas, Rider Pool Foundation

Our Work

TCC Group conducted a strategic review process for a corporate foundation focused on teens and mental health to examine its grantmaking portfolio and develop a strategic roadmap. We facilitated a collaborative process that leveraged the knowledge and expertise of a diverse set of foundation stakeholders and grappled with core challenges, including improving integration and alignment across current focus areas, and identifying strategies that would meaningfully advance racial equity. At the end of the process, the foundation was able to establish a “north star,” grantmaking framework, and a set of priorities and metrics that were both aspirational and realistic for the immediate future.

Since 2012, we have worked with a private family foundation on a project to create opportunities for women in the performing arts. Each year the foundation awards \$8m in grants to orchestras, opera companies, chamber groups, ballet companies and theaters to commission women composers, choreographers, and playwrights. Our role is to develop lists of eligible organizations, create and disseminate RFP’s for each of the specific areas, and work with the trustees to assess and recommend grant applications and keep up-to-date with the progress of commissions.

Grants Management *and* Administration

TCC Group provides comprehensive grants management services to families, companies or foundations wishing to outsource the program officer role and back-office work-- two critical functions in a well-run foundation. We support clients through every phase of the grantmaking process, from designing and managing applications to facilitating grants decision-making meetings; in 2022, we worked with a variety of clients



overseeing the allocation of more than \$65 million to organizations representing a multitude of sectors from small community-based organizations to large academic research institutions. TCC Group also has extensive experience with grants systems management and works closely with foundations to examine grant platforms and/or processes to identify areas for improvements and efficiencies. Services include:

- > **Development of grantmaking materials, including RFP management, stakeholder outreach and organizational vetting;**
- > **Due diligence on applicants, including financial analysis and reference checks;**
- > **Proposal review, including program summaries and funding recommendations;**
- > **Decision-making and grantmaking discussions, including docket planning and meeting preparation;**
- > **Grantee relationship management, including site visits, connection calls and evaluation tools;**
- > **Review of foundation's grants management systems and processes; and**
- > **Back-office support and collaboration with legal, accounting, and financial advisory teams.**

Our Work

TCC Group assisted a mid-size foundation in a review of their current grantmaking processes and practices, which led to the development of new practices anchored in trust-based philanthropy principles. We also provided recommendations about their systems by analyzing how their platform was being utilized and highlighting necessary refinements to improve them.

Starting in 2010, TCC Group began working with a healthcare funder to provide comprehensive services to inform community-driven grants and program design; conduct grants management and implementation; and co-create experiential innovation programming across their grantmaking portfolio. The first grant cycle engaged 36 organizations through two community giving programs, totaling almost \$900,000. After several years of steady, sustainable growth, the client's commitment expanded exponentially in 2017 to include 3 more initiatives and an additional \$3 million in grants per year. By 2022, TCC Group had developed and designed seven programs and administered, managed, and monitored the client's entire community giving portfolio, which supported the work of nearly 300 organizations annually receiving \$30 million in grants ranging from general operating support and large-scale project investments to grassroots community projects.

Governance Planning *and* Next Generation Engagement

TCC Group works with foundations to improve board effectiveness; we assess the health and practices of Boards, provide guidance on issues of composition, structure, roles, and performance, and deliver the tools and resources needed to strengthen board leadership and processes. We are often called on to collaborate with foundations as they go through lifecycle changes ranging from dissolving existing foundations to creating new ones to engaging new generations of family members. We are skillful and diplomatic facilitators and bring thoughtful and creative energy to understanding the dynamics of mature boards and the introduction of new board members, particularly next-generation family members. Governance and Next Generation Engagement services include:

- > **Benchmarking board practices against industry and peer practices;**
- > **Facilitating multi-generational discussions to define philanthropic plans of action;**
- > **Educating and training new boards and/or family members on the philanthropic field and foundation practices; and**
- > **Advising on board and committee structure as well as on roles and responsibilities.**

Our Work

After many years in operation, a long-term client determined that their next logical step would be to dissolve the existing family foundation and create individual foundations for each of the three branches of the family. Throughout the process, our staff's longstanding relationship with and understanding of this family foundation's dynamics was essential. TCC Group worked with foundation leadership and their tax and legal advisors to navigate legal and financial obligations, and to ensure that there was consistent, transparent, and timely communication with grantees. After the dissolution, one branch of the family engaged TCC Group to continue providing services to their newly emerging foundation, including identifying strategic grantmaking options and establishing their grantmaking structure. Throughout this process, TCC Group has engaged all relevant family members to elucidate individual and shared values, reach family consensus about foundation priorities, and provide staffing and support appropriate for the family members' capacity for engagement.

TCC Group worked closely with a family foundation client that had long been governed by the family's third generation and was expecting a wave of eligible members of the fourth generation. TCC Group provided guidance and support to the existing board members as they developed a structure through which younger family members could become engaged. Our staff provided framing and draft policies that led to the establishment of a "Next Gen Committee", which provided a space for the family's young adults to learn about the history and work of the foundation, expand their philanthropic knowledge and leadership skills, and work with family members to strengthen intergenerational ties.

For the past 8 years, TCC Group has worked closely with a corporate foundation in overseeing and implementing their signature initiative focused on scientific research and exploration of therapeutic approaches to disease and pain management. To date, the foundation has awarded nearly \$27 million to 26 grantees. We were instrumental in the development, administration, and management of the awards program. As part of this effort, TCC Group continuously makes recommendations for process refinements, develops and oversees outreach strategies and communications, and manages the application and review process—including the facilitation of the selection review meetings, management of award contracts, reports, and payments process. In addition, TCC supports the foundation in the development and execution of the yearly symposium, which convenes the grantees.





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