

# Membership Benefits

**We will guide you to answers you need, connect you to our community and the broader field, and work every day to champion your work.**

If you have questions about any of the member benefits listed here, don't hesitate to contact us at [info@exponentphilanthropy.org](mailto:info@exponentphilanthropy.org) or 202-580-6560.

## Connections With Peers & Professionals

*Through our network, we can connect you to other members, vetted experts, and our knowledgeable staff.*

- **Q&A service** offering personalized same- or next-day responses to your calls or e-mails
- **Online Member Directory** to search for fellow members by geographic area, areas of interest, funding strategies, and more
- **Member Discussion Lists** to pose your questions to fellow members, or share your tips
- **Peer Learning Cohorts**—Next Gen Fellows, Master Jugglers (foundation executives), and others
- **Directory of Foundation and Philanthropy Advisors**—the only national directory of professionals who serve philanthropists with few or no staff; all member-nominated

## Educational Programs

*Continual learning is one of our core values. Members receive discounts on all our highly respected programs.*

- **National and CONNECT Conferences**—Experience our popular multiday conferences for philanthropists with few or no staff and their advisors
- **Seminars** to advance your philanthropy, from our signature 990-PF Tax Seminar to popular Getting to Impact Seminars and more
- **Local Programs**—Join one of our local engagement groups or attend other regional programs
- **Distance Learning**—regular opportunities to learn from your desk via conference calls and webinars

## Online Tools & Resources

*We offer thousands of online resources helpful to philanthropists using a wide variety of strategies and with varied levels of experience. Many are exclusive member benefits.*

- **FAQs**
- **Sample documents**
- **Articles and tear sheets**
- **PhilanthroFiles blog**, [www.philanthrofiles.org](http://www.philanthrofiles.org)

## Publications

*Members receive special rates on our publications, including some at no cost.*

- **Essentials**—our quarterly publication
- **The Foundation Guidebook**—for those new to philanthropy or in need of a refresher
- **The Trustee Handbook**—our most comprehensive resource for foundation trustees and key staff
- **Primers** that distill key information into just 10–20 pages
- **Discussion guides** to help you frame conversations with your key decision makers
- **Teen Philanthropy Café**—a 7-part series to introduce young people to strategic, thoughtful philanthropy

## Assessment Tools & Benchmarking Data

*Take the pulse of your philanthropy and get information for decision making with these comprehensive tools.*

- **Practical Board Self-Assessment** to gauge what your board does well and where it might improve
- **10-Minute Impact Assessment** to help you identify areas of strength and opportunities for improvement
- **Member Operations and Management Report**—our signature member survey report with 50+ pages of data
- **Foundation Salary and Benefits Report**

## Discounts

*Members are eligible for discounts on important services and resources.*

- **Academy for Grantmaking and Funder Education**—15% off programs
- **D&O liability insurance**
- **Grants management tools**
- **GuideStar**—Discounts on Charity Check, FinSCAN, Pro Search, and Nonprofit Compensation Report
- **Jewish Funders Network**—15% discount on membership
- **TechSoup**—technology donations and discount on NGOsource

## News & Trends

*Stay current on legal issues, philanthropy trends, inspirational stories, and everything in between.*

- **Weekly Member Email Updates**
- **PhilanthroFiles blog**, [www.philanthrofiles.org](http://www.philanthrofiles.org)
- **LinkedIn, Facebook, and Twitter**
- **Careers in the field**

# Publications

To browse a full list of publications or to place an order, visit [www.exponentphilanthropy.org](http://www.exponentphilanthropy.org).

## Featured Publications

### The Foundation Guidebook

[Complimentary to members \(one copy\)](#)

*For those new to philanthropy or anyone in need of a refresher*

### The Trustee Handbook

*Our most comprehensive resource for foundation trustees and key staff*

### 2015 Foundation Operations and Management Report

[Complimentary to members in PDF](#)

*The premier benchmarking resource for foundations with few or no staff*

### Practical Board Self-Assessment

*Assess what your board is doing well and areas where it might improve*

## Additional Titles

■ Primers (20-30 pages): Available for purchase in print or PDF (complimentary to members in PDF)

■ Tear sheets (2-3 pages): [Exclusive member benefit in PDF](#)

### Starting Up

[An Introduction to Giving Circles](#)

[Creating and Running a Giving Circle](#)

[Donor Advised Funds](#)

[Scanning the Landscape](#)

[The Universe of Giving Structures](#)

### Administration

[Financial Reporting for Private Foundations](#)

[Hiring Great Staff](#)

[How to Start a Private Foundation](#)

[Keeping Good Records](#)

[Protecting Your Small Foundation With Insurance](#)

[Setting Up a Small Foundation Office](#)

[Working With Consultants](#)

[Creating a Foundation Website](#)

[Employment-Related Taxes](#)

[Going Paperless in a Small Foundation Office](#)

### Boards & Governance

[Bringing on the Board: Steps for](#)

[Orienting Board Members](#)

[Effective Governance for Unstaffed Foundations](#)

[Policymaking Made Clear](#)

[Recruiting Foundation Trustees](#)

[Trustee Compensation for Small Foundations](#)

[Annual Board To-Dos](#)

[Facilitation](#)

[Foundation Bylaws](#)

[Keeping Trustees on the High Road](#)

[Setting an Agenda](#)

[Twelve Activities That Require Extra Oversight](#)

### Family Philanthropy

[Connecting to Your Family's Foundation](#)

[Involving Children in Philanthropy](#)

[Making Plans for Succession](#)

[Engage the Next Generation in Giving](#)

[Multigenerational Engagement in Philanthropy](#)

### Grantmaking

[Awarding Grants to Individuals](#)

[Basics of Proposal Review](#)

[Communicating With Grantees](#)

[Disaster Grantmaking](#)

[Funding and Engaging in Advocacy](#)

[International Grantmaking](#)

[Investing in Nonprofit Leaders](#)

[Strategic Uses of Donor Advised Funds](#)

[Twenty Ways to Make a Difference](#)

[Using Site Visits](#)

[Working With Community Foundations](#)

[Disaster Relief](#)

[Engaging Stakeholders for More Effective Grantmaking](#)

[Funder Collaboratives](#)

[General Operating Support](#)

[Grant Tracking](#)

[How Grantmakers Can Help Address Key Financial](#)

[Challenges Facing Nonprofits](#)

[Program Related Investments](#)

[Supporting and Engaging in Networks](#)

[Supporting Nonprofit Collaboration](#)

[Understanding Nonprofit Financials](#)

[What Makes an Effective Nonprofit?](#)

### Impact & Evaluation

[Getting to Impact Discussion Guide Series](#)

[Getting to Impact Through Evaluation](#)

[Getting to Impact Through Planning](#)

[Getting to Impact: Why Evaluation Is Key](#)

[Focusing Your Giving: A Key to Impact](#)

[Impact Is Worth It](#)

[Using Evaluation to Become an Effective Learning](#)

[Organization](#)

### Investments

[Creating a Strategy and Plan for Your Foundation's](#)

[Investing](#)

[Getting It Done: The Who and How of Investing](#)

[Leveraging Your Assets With Loans and PRIs](#)

[Mission Investing for Small Foundations](#)

[Principles of Foundation Investment Management](#)

### Tax & Legal

[Closing Shop](#)

[Filing the Form 990-PF](#)

[How to Avoid Self-Dealing](#)

[Legal Essentials for Small Foundations](#)

[Closing Shop](#)

[Expenditure Responsibility](#)

[How to Avoid Tipping a Public Charity](#)

[It's Not Enough to Know Your Grantee Is a 501\(c\)\(3\)](#)

[Supporting Organizations](#)