



National
Philanthropic
Trust



Support for Donor Collaboration at National Philanthropic Trust

DONOR COLLABORATIVES are rapidly growing in popularity as philanthropists increasingly see the value of partnership. Collaboratives allow like-minded individuals, families and institutions to pool their charitable resources to have a more substantial impact on the issues that matter most to them.

At National Philanthropic Trust, we know from experience that launching and sustaining an effective donor collaborative requires both strategic thinking and a reliable infrastructure. We offer donors a deep bench of expertise in both. Our philanthropic experts can advise on how to optimize a donor collaborative to ensure impactful programs, sustain stakeholder engagement and maintain a powerful communications strategy to help the collaborative realize their vision.

With more than 25 years of experience in the philanthropic sector, National Philanthropic Trust has become well-known for our versatile donor-advised funds (DAFs). DAF structures are well-suited to host donor collaboratives. With ample opportunity for customization, we can help you evaluate specific needs for your project and provide the mechanism for your collaborative to thrive.

Advised Funds as a Collaborative Vehicle

Just as donor-advised funds are a simple solution for individual donors and their families, *advised funds* work well for collaborative funding projects championed by foundations or corporations.* These giving vehicles are the ideal solution for institutional and individual donors whose primary goal is to pool contributions in a single entity, out of which they can make grants to qualified charitable organizations. Advised funds are a cost-effective alternative to private foundations and offer the benefit of a neutral vehicle in which fund partners may pool resources.

As the charitable sponsor, NPT handles all of the administration, including accepting and receipting contributions, liquidating gifts of complex assets, managing investments, recordkeeping, tax filing and grantmaking. This comprehensive service model allows funders to focus on stewarding their donor communities and pursuing their shared charitable objectives. Donors can also access the expertise of NPT's Philanthropic Services team to develop and execute donor stewardship, communications or giving strategies.

- **Foundation-Advised Funds**

Private foundations aren't ideally suited to accepting incoming contributions from multiple outside funders. By doing so, they may increase their payout obligations while limiting the tax deductibility of the gift for the funders. Advised funds provide a simple solution: a neutral vehicle that allows foundations and other donors to pool resources toward common goals. Anchor donors may serve as advisors for these flexible structures, leaving ample room for other funders to stay engaged and involved.

- **Corporate-Advised Funds**

For companies pursuing corporate social responsibility programs, a corporate-advised fund offers powerful grantmaking capacity and a tax-deductible vehicle without the time commitment or expense of managing a corporate foundation. Companies can appoint a primary advisor to direct grantmaking based on the organization's charitable focus areas. A corporation may also use an advised fund to mobilize other funders around a particular issue area.

ADVISED FUNDS



BEST FOR:

Groups looking for an easy, cost-effective way to channel their collective grantmaking.

CASE STUDY

The **FUND FOR GLOBAL HEALTH & DEVELOPMENT** (FGHD) was launched in 2012 to reduce inequities in health and save lives by advancing strategies to combat AIDS, TB and malaria, to increase women's access to family planning services and to put an end to polio. Since its inception, it has made grants totaling \$556 million to health organizations around the world. More than 1 billion doses of polio vaccine have been distributed through FGHD grants, impacting countless lives and bringing us closer to a polio-free world.

In 2013, the Bill & Melinda Gates Foundation set up FGHD as a foundation-advised fund to be administered by NPT and NPT Transatlantic, our US-UK dual-qualified affiliate, in order to meet the needs of a truly global group of partners. Through our advised fund model, FGHD is able to accept gifts of cash in both domestic and foreign currencies, as well as complex assets that NPT quickly liquidates to make funds available for global grantmaking. The collaborative model allows individual and institutional contributors from the U.S., Southeast Asia and the Middle East to pool their resources, creating greater impact with minimal administrative burden, and driving transformative global health outcomes.

* *Advised Funds are technically donor-advised funds and are subject to all tax rules applicable to DAFs.*

Strategic Guidance

When you choose NPT to host your donor collaborative, it's important to know that you have an experienced team you can turn to when you need assistance. NPT's Philanthropic Services team can help you hone your donor stewardship strategy, convene your partners, communicate your project's impact and build your growth strategy. Your donor collaborative can access our expertise when you need support, ensuring a comprehensive, fully integrated solution for your charitable goals.

WHAT TO EXPECT WHEN YOU WORK WITH NPT

Since our founding in 1996, we have become nationally recognized leaders in philanthropy. Drawing on decades of experience, NPT will help you identify the best structure for your charitable partnership, and will offer a custom suite of services to help you achieve your philanthropic goals. When you work with us, you can expect:



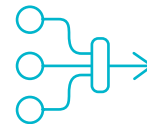
VERSATILITY

We offer several charitable vehicles and countless ways to customize them. We will make sure your structure best advances the goals of your collaborative partners.



EXPERIENCE

We have been sponsoring collaborative donor projects for nearly 20 years. Our past successes afford us a depth of expertise in fostering effective partnerships.



GUIDANCE

You have the vision and the insight to pursue your charitable goals. In those moments when you need strategic advice, you can access NPT's experts to amplify your collaborative's impact.

GET STARTED

Making progress on complex issues requires partnership and sophisticated tactics. Through a customized, seamless solution, NPT offers your team both the operational structure and the strategic guidance you need to have the greatest impact with your donor collaborative.

To learn more about how NPT can support your donor collaborative, please contact Andrea Rush, Senior Vice President of Philanthropic Services, at arush@nptrust.org or at (215) 277-3022. We would be honored to be your partner in giving.

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