

Tailored Solutions for Effective Giving

Run your foundation with confidence. Leave the complexity to us.



Greater Houston Community Foundation provides comprehensive, outsourced support to help private foundations operate efficiently while maximizing their philanthropic impact, without adding staff or administrative burden. As a trusted extension of your team, we partner closely with your board and advisors so you can focus less on operations and more on advancing the causes that matter most.

A Strategic Partner for Your Giving Journey

Thoughtful philanthropy requires clarity, insight, and perspective. Our Client Advisory team helps you make confident decisions by aligning your values with effective giving strategies. You gain objective guidance grounded in deep local knowledge and philanthropic expertise, so your giving is intentional, informed, and impactful.

- We support you by:
- Clarifying or refining your mission, vision, and values
 - Planning annual grant cycles and long-term philanthropic goals
 - Designing grantmaking strategies that reflect your priorities
 - Aligning your focus areas with relevant community needs
 - Interpreting giving trends and providing nonprofit landscape insights
 - Crafting Board roles and responsibilities for maximum joy and impact

Comprehensive Foundation Management

Financial Stewardship

Your foundation deserves rigorous oversight and peace of mind. You can trust that your foundation operates responsibly, transparently, and efficiently.

- Day-to-day bookkeeping; maintaining financial ledger for reporting
- Professional, outsourced investment management
- Clear, quarterly financial reporting
- Coordination of 990-PF tax filings with CPA firm
- Audit preparation and support, if necessary
- Seamless collaboration with your investment, CPA, and legal advisors

Board Meeting Coordination & Governance Support

Strong governance strengthens long-term impact. We help your board operate smoothly and stay focused on strategic leadership.

- Annual meeting planning and goal tracking
- Agenda development and materials preparation
- Meeting logistics and communications
- Take meeting notes and minutes for board review
- Track Board member and officer terms
- Steward Board member nominations process
- Conduct Board orientation and onboarding

Grant Management & Administration

A thoughtful grantmaking experience matters, to you and to the organizations you support. We manage the entire process with care, accuracy, and efficiency. Your grantmaking remains organized, coordinated, and well-documented, and delivers a positive experience for grantees.

- Serve as liaison between the client and nonprofits
- Grant application tracking and receipt
- Verification of nonprofit tax status
- Proposal review and due diligence
- Prepare grant proposal summaries
- Track Grant Agreement process and reporting metrics
- Award and denial processing
- Payment tracking and grant installment reporting
- Grant report collection and dissemination
- Review grant report(s) and prepare summary
- Historical grant analysis and future grant projections

Operations Support

Back-office tasks shouldn't interrupt executing your philanthropic vision. We handle the details so your board can focus on leadership and driving impact through your mission. The result: fewer distractions and more time for strategic grant-making.

- Annual operations coordination
- Foundation and grant-related communications support
- Business mail and general inquiry handling
- Secure document management and records retention

Specialized Consulting to Support Growth & Legacy

As your philanthropy evolves, we're here to support both near-term decisions and long-term planning. We adapt our services to meet you where you are—today and in the future.

Philanthropic Strategy

- Defining mission, vision, values, and purpose statements
- Create guiding documents reflecting grant making priorities and style
- Grantmaking design, implementation, and refinement
- Issue area research and analysis
- Philanthropic professional development and peer-group affiliation(s)

Planning

- Strategic planning and goal alignment
- Board training and orientation
- Teaming for strength and effectiveness
- Succession and multigenerational planning
- Legacy documentation and history preservation

Impact & Learning

- Grant history and giving trend analysis
- Executive summaries and/or impact reporting for grantees
- Grant report measurement and evaluation support
- Site visits, community engagement, and learning opportunities

Explore Greater Flexibility in Your Giving

Donor Advised Funds: An Option Worth Exploring

In some situations, a donor advised fund can be an appealing way to simplify giving while maintaining focus, flexibility, and purpose. Whether used on its own or alongside a private foundation, this structure can reduce administrative demands and make it easier to respond to opportunities as they arise—without sacrificing thoughtful, values-driven philanthropy.

Key advantages many donors appreciate include:

- Significantly reduced administrative complexity and operating responsibilities
- Attractive tax advantages, including fair market value deductions for certain contributed assets
- Flexible grantmaking timing and the ability to respond quickly to community needs
- Options for privacy or anonymity when desired
- Streamlined continuity and long-term planning
- No distribution minimums allow for more flexible grantmaking

Our Client Advisory team can help you evaluate whether maintaining, modifying, or transitioning your current structure best supports your long-term goals.

Your Philanthropic Partner

With Greater Houston Community Foundation as your partner, complexity gives way to clarity. We strengthen operations, streamline workflows, and support thoughtful family and/or Board engagement, so your philanthropy remains purposeful, effective, and enduring focused on what matters most.

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Foundation Services Client List



Apex Heritage Foundation
Annunziato Family Foundation
Barbara Bush Houston Literacy Foundation
Bill and Sara Morgan Real Estate Foundation
Butcher Fund
Comiskey Foundation
Connective (formerly Harvey Home Connect)
Cyvia and Melvyn Wolff Family Foundation
Frank Liu Jr. Foundation
Frankel Family Foundation
Golf For Greater Houston Fundraising
Great Southwest Equestrian Foundation
Herman H. Fleishman Foundation
Hope Biosciences Research Foundation
Houston Nursing Education Foundation
John R. Eckel, Jr. Foundation
Leon Jaworski Foundation
Lewis Family Charitable Foundation
Perry Family Foundation
St. Albert Trust
Raymond and Ola Mae St. Germain Foundation
The Cullen Trust for Higher Education
The Cullen Trust for the Performing Arts
Virani Family Foundation

Greater Houston Community Foundation is a proud member of:

- 21/64
- Center for Effective Philanthropy
- Charitable Gift Planners of Houston
- Dasra
- Exponent Philanthropy
- Grantmakers for Effective Organizations
- Greater Houston Grantmakers Forum
- National Center for Family Philanthropy
- Philanthropy Southwest
- The Philanthropic Initiative
- Women in Philanthropy