

# UPSOURCE™

A Seamless Way to Elevate  
Your Foundation's Impact

MARIN  
COMMUNITY  
FOUNDATION



# The freedom to focus on what matters most.

You didn't start a foundation to push paperwork — you did it to change lives. So let's get you back to the *why* of your philanthropy, rather than the *how*. Partner with MCF and reclaim your time, clarity, and purpose. Trust our experienced team to handle every operational detail — from giving plan design and grant program management, to complex international grantmaking and administrative guidance, and everything in between — so that you can focus on changing lives.



“Working with MCF allows our donors and staff to focus on the mission in a way I have not experienced before. I’m surprised more funders aren’t taking advantage of this possibility.”

**Ralph Lewin**  
Executive Director  
Peter E. Haas Jr. Family Fund



# Proven expertise at the ready.

When you Upsource™ your foundation to MCF, you're not just outsourcing operations – you're aligning with one of the nation's most experienced and respected philanthropic partners.

Backed by four decades of expertise, we bring an operational infrastructure built for accuracy, speed, and efficiency. Our team of experts support you in every step of your work – from strategic advising and deep research, to board management and administrative support. With our intuitive online Giving Center and sophisticated grantmaking infrastructure, we ensure that due diligence, IRS compliance, grant execution, and tracking run seamlessly. Our systems and teams deliver detailed financial and grantmaking reports that keep you fully informed and in control.



As one of the largest community foundations in the U.S., we manage almost **\$4 billion** in assets and annually process over **6,500** grants, totaling more than **\$285 million**

# A true partner in your philanthropy.

At MCF, our dedication extends beyond seamless operations to elevating you and your mission through strategic partnership.

From day one, you're paired with a dedicated advisor who becomes an extension of your team – someone who listens deeply and understands your goals, so you'll never face a decision alone. We can facilitate conversations with your board, offer strategic counsel and thought partnership, help refine your giving plans or fundraising strategies, and provide thoughtful insight rooted in decades of experience. You'll also gain access to our local and national network of resources.

Your philanthropic vision deserves more than support – it deserves the momentum that comes from having an expert in your corner at every moment.



**Katie Redford**  
Executive Director  
Equation Campaign

**“Our capacity to focus on programming and impact has easily increased by 50% thanks to MCF’s phenomenally innovative, professional, and passionate team. They’re a joy to work with.”**

# Elevate your giving.

Access our suite of products that take your mission to a new level.

## Philanthropic Advisory & Grantmaking Services

- Assigned Senior Philanthropic Advisor to provide philanthropic advisory, strategy and implementation services
- Giving plan design and execution
- Client's proxy in communications and negotiations with grantees
- Site visits on behalf of or with client
- Requests for and review of grant proposals
- Grantee due diligence
- Grant processing (domestic grants are typically processed within 5-7 business days)
- International grantmaking, including due diligence
- Grant monitoring and evaluation
- Custom research, including landscape analysis and issue area research

## Financial, Legal & Wealth Management Services

- Complex gift acceptance
- IRS gift and grant compliance
- Quarterly fund statements
- Legal counsel access for philanthropic matters
- Consultant access on specialty topics

## Fund Management Services

- New fund onboarding
- 24x7 secure online management via MCF's proprietary Giving Center
- Grant history management
- Donor mail management



# One-of-a-kind offerings.

## Venture Impact Program

Leverage philanthropic dollars as seed capital for investments in high potential nonprofits and for-profits.

## The MCF Loan Fund

Activate latent investments with recoverable grants or low-interest loans to nonprofits.

## Strategic Consulting

Fee-based services for complex long-term or high capacity projects – locally or globally.

## Pooled Funds

Collaborate with likeminded donors and increase the potential for impact by leveraging a unified strategy.





[marincf.org](http://marincf.org)

Ready to Upsource?  
Let's start the conversation.



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