



PHILANTHROPIC SERVICES TO FULFILL CHARITABLE GOALS

Cross-border giving is not always simple – donors must deal with compliance, tax and efficiency issues, as well as complex matters that are unique to each country. Donors need an expert that understands their philanthropic goals and can help them navigate through the process to achieve a lasting impact.

The Resource Foundation (TRF) is an expert at facilitating charitable giving from U.S. donors to the Americas the Caribbean. For 25 years, donors have relied on TRF's knowledge of the region's nonprofit organizations (NGOs) and their programs, and its tailored philanthropic services to safely and securely support effective NGOs in 28 countries. Through its experienced, multilingual staff, TRF provides donors with individualized services. Among these are the following:

- **Strategic Philanthropic Advising:** TRF works with you to identify programs, strategies and projects that meet your philanthropic objectives. Whether you want to support programs that target a specific population, issue or country, we can help you define a strategy that ensures your contribution has the greatest reach.
- **Grant Management Support:** TRF also helps donors perform many traditional "in house" functions. TRF manages, tracks, and can coordinate additional support related to donors' grantmaking through regular grant tracking updates, liaising with donors' local employees for the selection and management of funded projects, periodic communication with grantee to monitor progress, and preparation of articles and informational documents related to funded projects.
- **Comprehensive Due Diligence Processes:** TRF researches and verifies that the proposed foreign organization and project meet all U.S. laws and practices for international grantmaking. Due diligence is conducted for all proposed projects and all funded organizations on an annual basis. TRF also contacts in-country representatives for additional information.
- **Grantee Identification:** Through its network of 198 organizations from 28 countries, TRF helps donors identify effective organizations that meet their charitable goals. TRF can also identify organizations outside its network, and/or facilitate funding to an organization previously identified by the donor.
- **Diverse Programmatic Portfolio:** TRF's broad portfolio reaches underserved populations throughout the region. Local NGOs implement innovative programs in 10 development areas.
- **Monitoring and Evaluation:** All grantees are required to submit semi-annual narrative and financial progress reports to TRF. Reports are analyzed, translated and sent to donors. TRF may also make site visits where it deems appropriate, or at a donor's request.
- **Visibility:** TRF collaborates with donors and local staff to ensure that support is communicated to appropriate media outlets and highlighted in corporate communications materials.
- **Transparency and Accountability:** TRF maintains tight cost-controls. Over 90% of revenues are applied directly to programs and services. Charity Navigator has awarded TRF its highest rating of four-stars for efficiency and sound fiscal management in 2008, 2009, 2010 and 2011. TRF is independently audited on an annual basis and all financial statements are available for review.
- **Tax-Efficient Funds Transfer:** As a 501(c)(3) public charity, donations made to TRF are fully tax-deductible as allowed by law.



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The Resource Foundation

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