



NATIONAL CENTER

FAMILY
PHILANTHROPY

Pursuit of Excellence:

A self-diagnostic tool for planning and renewal in family foundations

Do you sometimes feel your family's philanthropy has yet to reach its **full potential**?

Are you preparing for **key transitions** - adding new board members, hiring a CEO, or launching a new grantmaking initiative?

Do **important questions** on governance, management, and mission linger on the board's agenda meeting after meeting without resolution?

Could you use a **simple, cost-effective tool** to quickly pinpoint the areas that need added attention?

The POE Self-Diagnostic Tool is for you!

Benefits

- Results in a comprehensive report providing instant insight into strengths and weaknesses, and areas where perceptions of effectiveness differ
- Requires just 10-15 minutes for board members and staff (optional) to complete
- Produces an action plan for the future

How it Works

- Review the list of POE-trained consultants
- Meet with the consultant of your choice regarding the process
- Complete the 15-minute POE questionnaire
- Review the results as a board for areas of agreement and difference.
- Create a plan for moving forward

Cost

- \$2500 for the POE tool; \$2000 for NCFP Friends of the Family (includes all reports and one year access to Family Philanthropy Online resources)
- Consulting fees to be negotiated with POE consultant



"The Pursuit of Excellence Self-Diagnostic Tool is straightforward, comprehensive, and, most importantly, useful. In the short term it helped our board to guide the evolution of our grantmaking. Over the longer term it has helped guide the recruitment of new board members and develop our understanding of the responsibilities we accept."

-- Bill Graustein, Lead Trustee, William Caspar Graustein Memorial Fund

***Interested in learning more?
Contact the National Center for Family Philanthropy at 202.293.3424.***