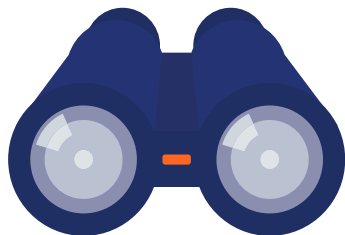


YPTC FOUNDATIONS SPECIALIZATION

CASE STUDIES: HOW YPTC SUPPORTS FOUNDATIONS AND THEIR GRANTEES



AT YPTC, our mission is to help as many nonprofits as possible grow stronger. Collaborating with foundations enables us to provide customized support for nonprofits of all sizes and stages of maturity at scale. We have helped hundreds of nonprofit grantees strengthen their accounting, financial management, and internal controls by working with foundations to deliver tailored education and direct support.

CASE STUDY: GRANTEE EDUCATION SERVICES FOR FOUNDATIONS STRENGTHENING COMPLIANCE WHILE BUILDING CAPACITY AND CONFIDENCE

THE CLIENT

A **CALIFORNIA-BASED FOUNDATION** that has distributed over \$300 million in funding to youth leadership and civic engagement organizations of all sizes and stages of maturity.

THE OPPORTUNITY

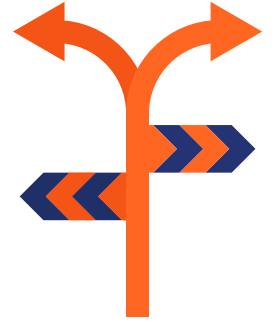
- **BUILDING** confidence and consistency among more than 250 grantees in managing grant funds
- **ADDRESSING** common desk audit pain points, such as grantees' inconsistent application of cost allocation methodologies
- **IMPROVING** internal controls within grantee organizations, including conflict of interest mitigation and proper segregation of duties in finance functions

OUR APPROACH

- **NEEDS ASSESSMENT:** Conducted surveys with both the foundation and its grantees to identify knowledge gaps and recurring compliance challenges
- **CUSTOMIZED TRAINING:** Delivered interactive webinar sessions on nonprofit finance and accounting best practices, focusing on the most frequently asked questions during the needs assessment phase. Topics included issues such as revenue recognition, grant tracking, cost allocations, internal controls, policies and procedures, and chart of accounts design.
- **ONE-ON-ONE COACHING:** Offered personalized coaching sessions for each grantee to address individual concerns and provided tailored takeaways, actionable recommendations, and curated resources
- **COMPREHENSIVE REPORTING:** Prepared a detailed summary report for the foundation, outlining training, outcomes, and next steps

THE RESULTS

- **STRONGER FINANCIAL PRACTICES:** Grantees reported increased confidence in designing accounting systems, implementing cost allocation policies, and strengthening internal controls.
- **ENHANCED REPORTING:** The foundation observed significant improvements in grantee financial reporting accuracy and timeliness.
- **CAPACITY BUILDING:** Organizations gained practical tools and knowledge to sustain compliance and financial health beyond the grant cycle.



THE IMPACT:

BY COMBINING EDUCATION WITH HANDS-ON SUPPORT, YPTC helped the foundation not only strengthen compliance but also empower grantees to build lasting financial capacity, ultimately advancing the foundation's mission.

CONTACT US with questions and learn more about our work with Foundations at www.yptc.com/foundations-specialization