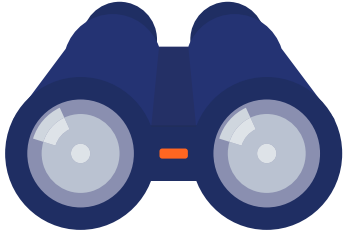


YPTC FOUNDATIONS SPECIALIZATION

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: DIRECT GRANTEE SUPPORT SERVICES FOR FOUNDATIONS RESTORING FINANCIAL HEALTH

THE CLIENT

A **TEXAS-BASED FOUNDATION** supporting arts and culture organizations

THE OPPORTUNITY

THE FOUNDATION IDENTIFIED SIGNIFICANT CONCERNS regarding the financial health and reporting quality of one of its museum grantees. The museum's initial state revealed critical gaps:

- No established accounting systems or processes
- Absence of accounting software for transactions and reporting
- Limited staff financial expertise and minimal board-level engagement
- Restricted funding significantly outpacing unrestricted funding
- Two years behind on audit compliance

OUR APPROACH

YPTC PARTNERED WITH THE FOUNDATION to provide **three years of direct support** to the museum, transforming its financial operations from baseline to best practice.

YEAR ONE: BUILDING THE FOUNDATION

- Designed and implemented detailed processes for the entire accounting function
- Introduced accounting, donor management, ticketing, and gift shop software
- Conducted internal controls assessment and implemented improvements

YEAR TWO: DEVELOPING FINANCIAL LITERACY

- Trained staff on budgeting and forecasting techniques
- Educated staff and board on interpreting financial reports
- Guided management and board on making informed decisions based on financial data

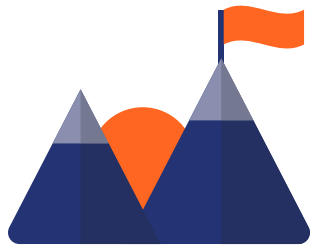
YEAR THREE: BUILDING THE FOUNDATION

- Assisted in hiring and onboarding a qualified CFO
- Provided ongoing oversight and mentorship to ensure confidence in financial leadership

DEVELOPING FINANCIAL LITERACY throughout the engagement, YPTC facilitated **quarterly check-ins** with both the museum's executive director and the foundation's program manager, ensuring transparency and alignment.

THE RESULTS

- **A FULLY PROFESSIONALIZED** grantee organization equipped with robust financial systems and software
- **A CONFIDENT MANAGEMENT TEAM** and engaged board capable of strategic financial decision-making
- **NEED-BASED ALIGNMENT** of restricted and unrestricted fundraising efforts through improved financial reporting and transparency
- **SIGNIFICANT IMPROVEMENT** in financial reporting to the foundation



THE IMPACT:

THROUGH SUSTAINED, HANDS-ON SUPPORT, YPTC transformed the museum from a financially vulnerable organization into a fully professionalized entity with strong systems, knowledgeable leadership, and sustainable practices. This partnership not only improved compliance and reporting but also advanced the foundation's mission to strengthen arts and culture by ensuring the long-term viability of its grantee.

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