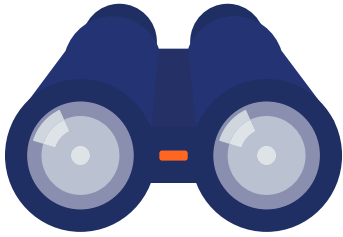


YPTC FOUNDATIONS SPECIALIZATION

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 TAKING SMALL NONPROFITS FROM REACTIVE TO RESILIENT

THE CLIENT

NATIONAL FOUNDATION receiving federal funding and regranting the funds to various small nonprofit organizations in their network.

THE OPPORTUNITY

THE FOUNDATION FACED SIGNIFICANT COMPLIANCE RISKS due to gaps in their sub-grantees' financial infrastructure.

KEY CHALLENGES INCLUDED:

- Small sub-grantees lacked the systems and processes required to manage federal funds in accordance with government standards (Uniform Guidance).
- As the primary grantee, the foundation had a greater risk of non-compliance stemming from their small sub-grantee deficiencies.

OUR APPROACH

TO ADDRESS THESE CHALLENGES, YPTC launched a **pilot program** with five grantee partners most in need of support.

Services included:

- **ACCOUNTING SYSTEM SETUP:** Implemented QuickBooks Online and provided hands-on training
- **GRANT TRACKING:** Established expense tracking systems and trained staff on proper usage
- **PROCESS AUTOMATION:** Connected bank accounts to accounting systems for efficiency
- **POLICIES AND PROCEDURES:** Developed and implemented foundational financial controls

THE RESULTS

THE PILOT PROGRAM DELIVERED MEASURABLE IMPROVEMENTS:

- **GRANTEES GAINED THE ABILITY** to manage federal funds independently after initial setup and training.
- **AUTOMATED PROCESSES** streamlined accounting and improved accuracy.

- **COMPLIANCE RISK** for the foundation was significantly reduced, while operational efficiency improved.
- **THE SUCCESS OF THE PILOT** enabled the foundation to secure additional funding to expand support to larger cohorts.

THE IMPACT:

BY EQUIPPING SMALL GRANTEES with essential systems, training, and policies, YPTC strengthened compliance and built financial capacity across the network. This initiative not only mitigated risk for the foundation but also empowered grantees to manage federal funds confidently, positioning the foundation to scale its impact and secure future funding.



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