

FOUNDATION MANAGEMENT

VALUEworks is a leading philanthropy adviser and provides state-of-the-art foundation management, with a holistic, values-based approach to its global clients.

VALUEworks supports philanthropists and foundation boards with comprehensive, professional administration. We assist you in setting up your charity and implement sound governance practices. We help increase your foundation's efficiency and reduce administrative burdens. With our guidance, you can meaningfully engage project partners and boost the impact of your foundation's giving. Together, we can **DO GOOD BETTER!**

Foundation Administration & Management

- Setting up foundations incl. drafting of statutes and by-laws and obtaining tax exemptions
- Development of a donation strategy
- Research on mission-aligned themes, and evaluation of organisations and tailor-made projects both locally and abroad
- Preparation of board meetings, and file keeping
- Handling of all correspondence
- Development of criteria for impact measurement
- Project monitoring, including on-site visits and coordination with partner organisations

Finance & Reporting

- Support in defining a sustainable, mission-aligned investment strategy
- Bank selection and investment monitoring
- Cash-flow management and fee negotiations
- Invoicing and payments
- Bookkeeping services (Swiss GAAP FER 21), including payroll accounting and social security
- Audit preparation and coordination
- Reporting to supervisory and tax authorities
- Supervision of use of grants made and regular financial reporting to the Board