



GRANTMAKING ADVISEMENT SERVICES

Caruso Consulting Corporation works with private and family foundations to bring strategic focus and structure to their charitable giving efforts. Our goal is to enable clients to maximize the impact of their philanthropy and to garner visibility for their contributions, if they so desire.

The firm's founder and president, Karen Caruso, worked for more than eight years as a consultant to the Oneida Nation Foundation and previously was the Director of Foundation Relations at New York University. Through her 23 years of experience in the nonprofit sector, Ms. Caruso enables clients to achieve clarity about their purpose and to focus on the outcomes of their philanthropy. Services include:

- **Mission Statement Development**
Working with a client to create a mission statement that reflects their values, interests and priorities.
- **Giving Guidelines Establishment**
Developing guidelines for contributions that articulate and advance the mission, and ultimately streamline the grantmaking process.
- **Strategic Planning**
Formulating a strategic plan to implement a client's goals and priorities, and lay out the long-range and short-term objectives and activities for achieving them.
- **Board Meeting Facilitation**
Collaborating with a client to develop a realistic and proactive agenda, and attending the board meeting to guide the discussion and decision-making process.
- **General Administration**
Establishing policies and procedures to provide a framework for the grantmaking process, including proposal review, grant awards and reporting requirements, and training administrative staff members. Also working to establish an online presence.
- **Program Evaluation**
Reviewing and analyzing programs to ensure that goals and expectations are being met and to measure impact.



KAREN CARUSO

As founder and president of Caruso Consulting Corporation, Karen Caruso has over 23 years of experience in the nonprofit sector. Since 2001, she has been an independent fundraising consultant to such clients as Sesame Workshop (*Sesame Street*), the Wildlife Conservation Society, the Trust for Public Land, and The After-School Corporation..

For more than eight years, Ms. Caruso also worked with the Oneida Nation Foundation to maximize the efficiency, impact and visibility of their charitable giving program. In addition, Ms. Caruso has an abiding interest in career development and a long history of advising individuals on career planning and job search strategies.

Prior to starting her consulting practice, Ms. Caruso spent eight years at New York University during its First and Second Billion Dollar Campaigns, working in foundation relations, major gifts and alumni annual funds. Previously, she handled corporate relations at the Police Athletic League and New York Blood Center.

Before joining the nonprofit sector, Ms. Caruso worked in Account Services at Grey Advertising. There she managed media planning, creative development, and broadcast and print production for such clients as Bloomingdale's, Playtex, and Remington. Prior to Grey, she worked in sales in the fashion industry.

Ms. Caruso served on the board of directors of Women in Development, New York (WID), and is a current member of WID and the Association of Fundraising Professionals. She received a B.S. in Marketing from St. John's University and a certificate in Adult Career Planning and Development from New York University.



CLIENT CASE STUDY: ONEIDA NATION FOUNDATION

- Charitable donations by tribal nations contribute to the local and national economies, just as their economic enterprises do. Tribes need to make sure they're getting credit for their generosity and that their gifts are making a difference.
- Initially, the Oneida Indian Nation made donations in response to requests as they came in. Donations were generally small, the process was burdensome, the Nation got little, if any, credit, and there was no way to follow up and measure impact.
- A Donations Committee was formed and the Oneida Nation Foundation was established. The Foundation brought in a consultant, Karen Caruso, to structure and professionalize the process and heighten recognition for its charitable giving. Working together, we accomplished a great deal.
- Developed guidelines and procedures to streamline the grants process. Set up a database to track donations and generate reports.
- Reduced workload for the Foundation Committee by training administrative staff to prescreen applications, maintain database, and prepare agenda items for monthly meetings.
- Created a web site to provide information on application guidelines and highlight charitable giving efforts.
- Focused grantmaking on a fewer number of larger gifts and made the process more proactive than reactive by pre-selecting charities for Foundation support.
- Attracted media coverage and heightened visibility by hosting two to three check presentation events annually, at which checks of \$1,000 were given to a group of organizations focused on a particular theme (e.g. children, health, or education).
- Produced a cumulative report on all the monetary and non-monetary donations made by the Nation over the years, which totaled over \$26 million – nearly \$16 million devoted to Indian Country and more than \$10 million to the local community.
- By partnering with Ms. Caruso, the Oneida Nation Foundation transformed a burdensome, time consuming and ad hoc grants process to one that was streamlined and proactive and gained recognition for the Foundation's charitable work.