

Xelay Foundation 2018 Annual Report

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1. Introduction

Established in 2015, Xelay Foundation was created to:

1. Focus our ongoing internal commitment, investment, and programs (social responsibility)
2. Broaden our outreach and breadth of involvement in our local communities
3. Dedicate resources to advance our operations, finances, and relationships

As part of the Xelay Acumen family, our mission has always been to deliver extraordinary results through the development of high potential team members. In line with Xelay Acumen's core values, addressing Challenging Issues and pursuing Engagements That Matter enables us as an organization to create significant step changes in people's lives and society. The social responsibility to contribute back has always been the driving force behind each of our engagements and the creation of Xelay Foundation allows us to expand on our ability to positively contribute to society.

The Foundation works closely with Xelay Acumen, the leading healthcare strategy and management consulting firm, to create long lasting impact through social responsibility. We support local non-profits through multiple types of support and develop our people through opportunities to engage in philanthropy. Our values of Engagements That Matter, Challenging Issues, and Develop Our People lead to contributing broadly in value added ways through the servant leadership model – to lead by serving others.

2. 2018 Accomplishments

Programs

Our programs enable our team to participate in philanthropic opportunities and engage with local nonprofits. Our programs are designed to ensure we cover all types of support that charities may require: hands-on support, internal infrastructure support, and financial support. In 2018, we organized 16 engagements across our 5 programs.

- I. **Volunteer** – Organize opportunities for (1) our team members to engage and learn about different types of issues and (2) provide hands on support to local organizations
- II. **Consulting** – Develop our people through engaging on a deeper level with different charities while helping organizations strengthen their strategic planning, infrastructure, and internal processes
- III. **Grant** – Provide financial support to empower organizations to implement decisions
- IV. **Match** – Encourage Xelay team members to donate back to the communities they care about and support the causes they care about
- V. **Pooled** – Leverage the team to increase our ability to provide greater financial support

I. Volunteer Program

We coordinate monthly volunteer events for Xelay staff to provide hands on support to local organizations. By working in teams, we efficiently complete large projects that provide high impact to the charity. For our team, we are able to learn about different issues through the organizations we support, connect with the community, and improve staff bonding.

In 2018, the Foundation organized 7 volunteer events to contribute to corporate engagement in the Bay Area community:

- **Children:**
 - Samaritan House –
 - Back to School Drive: Organized and filled dozens of school bags with supplies for children
 - Holiday Toy Drive: Wrapped, sorted, and distributed holiday gifts for the Samaritan House Holiday Event
 - San Mateo County Health Foundation – Helped assemble 41 care packages for newborn babies and their mothers
- **Animal:** Family Dog Rescue (FDR) – Socialized the dogs, influenced people to adopt/foster the dogs, and increased awareness of FDR
- **Food Access:**
 - Samaritan House Kitchen – Prepared lunch boxes and sorted donations from food drives
 - Hope's Corner – Set up and served breakfast for people in need of help
- **Environment:** San Mateo Stewardship Corp – Helped restore native habitat by planting California-native species (evening primrose, willow dock, hedge nettle, cow clover, and sneezeweed) at Junipero Serra Park



II. Consulting Program

The Xelay Foundation offers pro-bono consulting services to potential partner 501(c)(3) organizations. We problem-solve key organizational challenges organizations face, such as long-term strategic planning and operations. These areas are crucial for the growth of nonprofit organizations; however, organizations often lack the funding to do so. Our pro-bono consulting services aim to alleviate some of this gap in the nonprofit sector.

This year, we improved internal processes for pro-bono consulting services by defining:

- What consulting services we provide
- How to prioritize the projects based on our capabilities, resources, and alignment with our objectives
- How we approach executing pro-bono consulting projects

III. Grant Program

We award general operating grants to qualifying 501(c)(3) organizations that fall within our areas of interest to encourage Xelay Team Philanthropy, Develop Our People, and Engage Locally. We prioritize partner organizations by their alignment to our approach of Empowering Communities, Listening to Empathize, and Providing Feedback. This year, we were able to support 5 organizations for a total donation of over \$37,800!

- Samaritan House
- Cambodian Children's Fund
- Massachusetts Institute of Technology Association
- Nueva School
- Odyssey School

IV. Match Program

Through Xelay Match Program, we contribute a 1:1 match for qualifying charitable donations our Xelay Acumen team members make during the year. Together we are able to make a greater impact and support the causes our team cares about. In 2018, we donated a total of \$700 to support 4 organizations:

- University of California Berkeley, Biology Scholars Program Fund
- Social Justice Fund
- KQED
- Rx Art

V. Pooled Program

Xelay Foundation matches pooled contributions of Xelay team members. By leveraging the team and support of Xelay Foundation through group giving, we are able to achieve a larger impact for the organizations we support.

This year, we developed an application and streamlined the review processes to increase efficiency for our team to apply for the pooled program.

Networking

As a foundation, it is critical for us to continue to connect and develop relationships with nonprofit organizations in the Bay Area to:

- Spread awareness of our Foundation and the programs that we provide
- Learn from the experiences of foundations and nonprofits in the field
- Learn about the nonprofit landscape in the Bay
- Identify and support partners
- Increase awareness of our team around a range of issues

This year, we continued to develop our relationships with other nonprofit organizations through 4 events:

- **Service Providers:**
 - Samaritan House Volunteer Recognition Dinner – Celebrated the wonderful work the community has done over dinner
 - Kitchen Table Advisor –
 - Farm Tour: Attended farm tour with Kitchen Table Advisors at Markegard Family Grass Fed Farm in Half Moon Bay and learned how they support local farmers
 - Grazing at the Kitchen Table: Celebrated women in sustainable agriculture while enjoying local fare and learning about the food being served directly from the farmers who produced it
- **Associations:** Northern California Grantmakers Holiday Party – Networked with ≥ 10 philanthropic and grant-making organizations in the Bay Area that focus on equity and justice



3. Infographics

Xelay Foundation has significantly contributed to our community this year through our 5 programs. We aim to continuously dedicate our resources and expand our outreach to empower our communities.

Xelay Foundation Made Significant Strides Through Programs and Networking in 2018

Volunteer

140 Hours



Provided Hands-On Support Through 7 Events

Grant

\$37,800



Donated Grants to Support 5 Organizations

Match

\$700



Matched Donations to 4 Organizations

Training

7 Processes



Created Training on Processes for 5 Programs

Networking



65

Professionals Connected Through 11 Events



4

New Organizations Engaged with