

# A Guide to Working with Philanthropic Advisors

 **FIDELITY** Charitable®  
Make more of a difference

Fidelity Charitable® is dedicated to fostering strategic philanthropy and recognizes that some donors often need in-depth support that is best provided by specialists. We have collaborated with a group of leading philanthropic advisory firms to provide a resource for donors wanting to learn more about how to engage expert help to become more effective givers.



# A Guide to Working with Philanthropic Advisors

Most donors want their philanthropic dollars to be used effectively and to find joy and satisfaction from their giving. But navigating the world of philanthropy can be a challenge. Knowing how and where to give to maximize impact requires experience and expertise that many individual donors and families don't have, especially when first getting started. Even donors who've gained considerable knowledge about philanthropy may not have the time to develop and implement a strategy.

A philanthropic advisor can help. This guide provides answers to common and important questions about the role that philanthropic advisors play in supporting charitable planning and giving, as well as factors to consider before engaging an advisor.

This resource was co-created by Fidelity Charitable® and a group of leading philanthropic advisory firms to provide a resource for donors wanting to learn more about how to engage expert help to become more effective givers.

## What is a philanthropic advisor?

Simply put, philanthropic advisors are individuals or teams hired by a donor or family to navigate the how, what, and why of giving and to improve charitable outcomes. They can also help guide interested donors through social impact investing and how it may contribute to their philanthropic goals. But a good philanthropic advisor can be much more to a donor or family than this short definition suggests. Below are some specific ways a philanthropic advisor can help.



## What services can a philanthropic advisor provide?



### They help design a strategy or plan for giving.

Philanthropic advisors can help donors clarify their values, mission and goals. A philanthropic advisor will listen to donors' charitable interests and priorities and work with them to document and define an approach that meets their needs. This support gives shape and brings clarity to a donor's ideas and helps translate them to action.



### They support and facilitate discussions among families.

Giving together as a family can be a rewarding experience, but it's not always easy. Philanthropic advisors give families the tools to examine individual family member's interests and desires to participate in family philanthropy and then use that information to define each member's role in the family's philanthropy and to support them in deciding where and how they will focus their resources as a group and/or as individuals.



### They identify giving opportunities and carry out plans.

Some donors know what causes are important to them but still need assistance finding the right nonprofits and giving opportunities. Philanthropic advisors use their expertise as well as their professional relationships to match a donor's charitable vision with suitable organizations or projects—and they can help structure the funding agreements, too.



### They evaluate the impact of donor grants.

Results-oriented donors can rely on philanthropic advisors to help them understand how, and if, their giving is leading to the outcomes they hope to achieve.



### They identify other aligned funders or learning partners.

Philanthropic advisors can help donors who wish to make a bigger impact in a specific area to identify like-minded individuals with whom to meet and collaborate.



### They coordinate with investment advisors and financial planning experts.

Philanthropic advisors are less focused on tax and financial planning and more focused on matters related to the distribution of charitable assets. However, they may work with a donor's financial advisor, tax attorney, estate planner and other experts who play important roles in helping an individual determine which assets to give to charity and when, which giving vehicles are most appropriate, and how best to integrate charitable giving goals into broader financial plans.

## When does a donor need a philanthropic advisor?

Individuals and families decide to work with a philanthropic advisor for different reasons and at different stages of their lives. Here are some common situations where donors may look to an advisor for clarity and support.

### When philanthropy requires more time and focus than a donor can give.

People who've dipped a toe in financial planning know how time-consuming it can be—in fact it's one reason why many households hire financial advisors. Philanthropic planning can be equally complex. A philanthropic advisor can assist busy individuals and families with the research and evaluation of nonprofits, including deciding where to give, how much to give and over what length of time.

Many dedicated givers also feel overwhelmed by the number and frequency of requests they receive from nonprofits. Advisors can help by managing relationships with nonprofits, especially for donors who prefer to remain anonymous. They also can step in to help clients focus on the causes and issues that matter most to donors and support them in developing a tailored, proactive plan for their giving.

*Donor example: An individual woman who is the sole inheritor to a family fortune comes from a family with a heralded philanthropic legacy, yet wished to remain out of the public eye. Arabella designed a team based on the family's culture and the individual's personality and working style. They guided the donor in developing mission, vision, and values statements and helped her focus her giving strategy on public education advocacy and humanities education. Her Arabella team developed and executed a plan that builds on her passions, respects the way she wants to engage in the family's philanthropy, and is realistic given the time she can commit. With Arabella's support, the donor was able to develop a grants portfolio driven by her and her family's values that promises to have great impact on the fields in which she is investing.*

*Donor example: A three-generation family that had been grant making for years decided to make their family giving strategy more transparent. As pleased as they were to lift up to prospective grantees their giving priorities and goals, they found that publicly communicating their giving priorities significantly increased the number and frequency of funding requests. VENTURE3Philanthropy was invited to design and develop a simple system for use by the family to track and review funding requests. Once the new, simple system was up and operating, the family was more aware of the status of all funding requests and what grant recommendations best fulfilled their giving strategy. With VENTURE3Philanthropy's support, the previous family feelings of being overwhelmed ceased, and the family's simple system of organization and communications produced more timely and effective decisions for grant recommendations that more closely aligned to their giving priorities. It helped ensure that the whole giving experience was one of joy, with deep personal meaning and desired social impact.*

### When a change in finances leaves a donor with more to give.

A philanthropic advisor can help individuals who have experienced a financial windfall and have more to give than in the past by working to clarify their charitable priorities and motivations. Having a well-defined plan in place allows donors to feel more confident in their decision making around giving, especially when giving at significant levels.

*Donor example: After Paul Carter (names changed) sold his company, he wanted to engage in philanthropy at a deeper level. Excellence in Giving recommended he start with their Discovery Process. They led a two-hour interview to guide Paul and his wife Rebecca in conversation about their backgrounds, interests and how they dream about changing the world. They explored their past to inform their future goals. While Paul and Rebecca could already verbalize many of their philanthropic goals, the process allowed them to consider the full scope of what they enjoy (and don't enjoy) about their giving. In the end, they defined goals and preferences. But more importantly, they effectively communicated family values and giving goals to their three teenage daughters who probably did not know much about the family's giving priorities and philosophies. The Giving Profile became a helpful tool to have new conversations about what the Carter family stands for and what their philanthropy is all about. Excellence in Giving now helps them execute their giving at significant levels with confidence, according to the values they documented.*

### When a donor wants in-depth information about a cause.

Philanthropic advisors use their expertise to research topics or issues a donor may be considering supporting. Advisors may look for key opportunities for philanthropic funding and identify high-impact organizations that are working in a particular sector or area.

*Donor example: Spurred by the changing political environment in the United States, a donor came to Rockefeller Philanthropy Advisors for help in developing a strategy for her grant making focused on civic engagement, freedom of the press and voting. RPA led her through a process to clarify her values and to develop a mission as well as giving guidelines for her philanthropy. To ensure that the donor had a thorough understanding of the existing landscape, RPA conducted research and analysis of the status of issues in which she was interested, including key funders and potential grantees. RPA also created a grants process, and ultimately supported her in making more than \$1 million in grants. RPA continues to be involved, introducing the donor to leaders in her issue areas, recommending learning opportunities and serving as a source of thought partnership on involving her children in her philanthropy.*

### When a donor wants to understand charitable impact.

A philanthropic advisor can help a donor track the impact of her giving by monitoring and evaluating the grants she has made to nonprofits. Following up with nonprofit staff and analyzing reports provided by organizations help an advisor determine if a donor's charitable aims are being met. This tracking also can inform discussions about potential adjustments to a giving strategy.

*Donor example: The directors of the Urban Action Fund (UAF) were proud to be completing their first decade of grant making for social science research. As they reached this milestone, they were eager to know the degree to which the fund was fulfilling its mission and what adjustments they might make in their future decision making. They had evidence that their grants had led to major policy changes and benefits for communities, but they wanted to know more about what had led to successful outcomes and where organizations faced challenges. UAF asked GMA Foundations to lead them in an impact assessment. GMA's research both confirmed the impact of their grant making and also identified key characteristics that led to the success or failure of the funded projects. The report helped the directors refine the fund's review process and communication with applicants.*

### When important life events impact a family.

When a family experiences a liquidity event or significant life event, such as a marriage, birth or death, the responsibilities and activities of those involved in the family's giving may also experience transition. Sometimes this change is best navigated in multigenerational families by an independent party, such as a philanthropic advisor. An advisor can support the conversations and provide guidance around the family's giving choices and how those may be continued or altered.

An advisor can also help a family that's just getting started in charitable giving by making sure members are answering important questions about the roles, level of involvement and extent of collaboration expected from everyone. Cooperation at the beginning of philanthropic planning can pave the way for greater agreement and more impactful giving decisions as the months and years pass.

*Donor example: From the start, a family foundation in Boston (which is actually a donor-advised fund used by a family to structure their philanthropy) has been deeply rooted in social justice in Greater Boston and some other parts of the world. The donors—a couple with strong ties to the city and strongly held philanthropic values—knew they wanted to pass down their legacy and foundation to the next generation. However, turning toward the future to create a multigenerational legacy can be daunting. During family meetings, the couple found themselves sharing their grant recommendation process and grantee information without much involvement from the next generation. After making their daughter, two sons, and two daughters-in-law trustees, they agreed it was time to create a philanthropic plan. The family needed structures in place that would not only allow them to grow as a foundation but would also involve each trustee as a thoughtful, strategic and collaborative partner. They*

*turned to The Philanthropic Initiative (TPI) during this period of great change. TPI guided the family through crafting a donor legacy statement, curating guidelines for grant making and creating a philanthropic plan. TPI interviewed each trustee to ensure all thoughts and ideas about the future of the foundation were being heard. By undergoing a strategic planning process, the family has been able to ramp up their giving to achieve high-impact philanthropy. The donors now spend family meetings engaged in deep, thoughtful conversations that lead to joint decisions regarding the future of the fund.*

*Donor example: A sophisticated tech entrepreneur found the family's philanthropic resources growing rapidly as a result of their business success. The donors had substantial knowledge in their fields of philanthropic interest, yet sought an advisor who could bring additional resources to the table and help them implement and grow the grant-making programs that they envisioned. The family wanted to remain out of the public eye, so they established multiple donor-advised funds and approached Brown Philanthropy Advisors to oversee and develop the grant programs, recruit experts in the field as advisory board members, develop a website for communication of grant information, research potential grantees, and manage the application, review, and evaluation process. In its first two years, one of those programs has awarded 15 grants supporting 32 researchers at 10 federally designated cancer centers and their associated universities. The donors are clearly having an impact and anticipate significant increases in giving going forward.*

### When a donor wants help to design and manage significant legacy gifts.

Philanthropic advisors can provide accompaniment to ensure that legacy gifts have long-term benefits to the organizations they choose to support.

*Donor example: A sophisticated donor with significant charitable assets wanted to gift the bulk of her wealth in her lifetime to a set of selected organizations. She understood the need to build the capacity of these organizations in order for them to absorb and maximize the power of a large legacy gift. Dietel & Partners has been working over the past few years to act as liaison between select organizations and the donor, design and negotiate staged capacity building grants, and provide strategic thought partnership for legacy gift decisions. The donor has increased confidence in deploying large tranches of charitable capital and enjoys seeing the organizations she cares deeply about becoming stronger and more adept.*



## What should a donor consider before working with a philanthropic advisor?

In the right circumstances, a philanthropic advisor's expertise can elevate a donor's charitable giving. Here are a few important elements that donors should consider as they think about hiring a philanthropic advisor to make sure they make the most of the relationship.

### Level of openness and receptivity to help

As with any consultant who assists individuals with their goals, a philanthropic advisor can be a powerful partner—but only if donors are receptive to advice and make themselves available to their advisor. Willing discussion is critical in working together to plan and achieve charitable aims.

### Role for other family members and advisors

That essential ingredient in the advisor-donor relationship—a willingness to accept help—extends to other individuals involved in a donor's decision making around giving. In many situations, the work will be most effective if family members and additional professional advisors engaged by a donor, such as financial planners, are supportive of the effort and available to participate in the process as appropriate.

### Priority areas and needs

There are several approaches to working with a philanthropic advisor and several ways an advisor can help. To make the most of the investment of time and resources with an advisor, donors should be clear on the nature of their needs and their priorities and structure the engagement accordingly.

#### Short term

Many individuals engage a philanthropic advisor for a single, limited project, such as to define a giving plan or to prepare for a family transition that will alter giving roles. An advisor serves as a short-term consultant in these scenarios to assist with a temporary need.

#### Long term

Some donors require a philanthropic advisor's assistance for an extended amount of time, such as to support the management and execution of a long-term giving plan that requires consistent assessment and attention. In this case, the advisor may serve as an alternative to hiring staff to support one's philanthropy.

#### Occasional

Dedicated givers who have ongoing but undefined needs may engage advisors to provide occasional counsel. These advisors can serve as a sounding board when working through questions related to specific gifts, family dynamics or other challenges that arise.



## How can donors find and evaluate a philanthropic advisor?

When a donor has established her reasons to engage expert help in charitable giving, the next step is to locate a philanthropic advisor who speaks to both her needs and her operating style. These tips will guide donors in that process.

### Research the right fit and qualifications

#### Reputation

Donors are wise to investigate the background and experience of the firm or individual they are considering for philanthropic help, just as they would any other type of consultant. It's crucial to confirm that advisors are trustworthy and have a successful track record. Speaking with references can be particularly useful when evaluating the quality and experience of a philanthropic advisor.

#### Chemistry

A philanthropic advisor should have a style, approach and philanthropic philosophy that aligns with the donors', so spending some time talking with an advisor and getting a feel for how he works before formalizing an engagement just makes sense. References also are helpful here. Donors should be comfortable sharing any personal challenges or goals with their advisor and feel confident that an advisor has the expertise to do the work asked of him; they should also get a sense that he will listen to all parties involved in giving. An advisor must be able to work well with all the people and entities that have a hand in a donor's charitable giving.

#### Experience

It goes without saying that an advisor should have demonstrated experience working in philanthropy—and in the areas where a donor needs assistance, whether that means working with families or structuring complex international gifts. Experience as a grant maker and existence of networks in the communities where the donor is trying to make change are also very valuable. Philanthropic advising encompasses more than simply disbursing gifts; it includes providing thoughtful strategic input, creative problem-solving, and knowledge of and appreciation for the dynamics between grant maker and grant recipient.



## Look in the right places

The landscape of professional philanthropic advisors includes both individual consultants and firms, general advisors and deep subject-matter experts, and practices with both diverse and more specific services. Choosing which type of advisor to engage depends on a donor's needs, both immediately and in the future. If a complex giving strategy involving many sectors and multiple vehicles is anticipated, a donor might prefer a firm with a broad range of advisors and services. If a donor prefers to work with one expert or has a narrow charitable focus, an individual advisor may be a more suitable option.

There are several ways to identify experienced philanthropic advisors. Reaching out to a respected financial advisor, a local community foundation or a trusted peer can be a great place to start. Donors can also consult a directory of philanthropic advisors, like those listed below, and continue the appropriate background research from this starting point.

### Directories of Philanthropic Advisors

- **Exponent Philanthropy Directory of Advisors**  
<http://www.exponentphilanthropy.org/resources/directory-of-advisors/>
- **National Network of Consultants to Grantmakers**  
<http://www.nncg.org>
- **21/64 Directory**  
<https://2164.net/certified-advisors/>
- **Fidelity Charitable referral network**  
<https://www.fidelitycharitable.org/private-donor-group/philanthropic-guidance.shtml>

## How do donors structure an engagement and assess fees?

The contract structure and associated fees for an engagement with a philanthropic advisor will depend primarily on the specific nature of the work requested. For example, using a philanthropic advisor to organize a family retreat for charitable planning will have a different scope and fee structure than defining, building and providing support for a multi-year giving plan. However, any engagement with a philanthropic advisor should have a well-defined plan, including deliverables and a timeline, to achieve the donor's goals.

### A few common pricing models include:

#### Project-based fees

The advisors' fees are fixed and tied to a defined scope of work. This model may be most helpful in cases where the advisor is being hired to conduct specific research or facilitate a meeting or set of meetings.

#### Retainer model

The advisor is available to help a donor on an ongoing basis; this model is often useful for donors who need support across many different areas of giving, and over a long period of time, but don't need a full-time staff member.

#### Hourly fees

This model is most helpful if a donor wants the greatest flexibility in working with an advisor, allowing the donor to engage the advisor on an ad hoc and as-needed basis to support a donor's learning process, support a strategic planning process that may evolve over time, serve as a sounding board, answer specific questions, or assist in other ways.

## Other helpful resources

### From Arabella Advisors:

- <https://www.arabellaadvisors.com/blog/5-ways-to-overcome-challenges-of-individual-and-family-giving/>
- <https://www.arabellaadvisors.com/blog/philanthropists-advisors-talking/>
- <https://www.arabellaadvisors.com/blog/begin-next-generation-engagement-by-defining-why-then-how/>
- <https://www.arabellaadvisors.com/audience/families-individuals/>

### From Dietel & Partners:

- [https://static1.squarespace.com/static/5a78e75bcf81e03e104449e5/t/5aa2f62724a694a64be2a595/1520629288336/Dietel-and-Partners\\_Checklist\\_g.pdf](https://static1.squarespace.com/static/5a78e75bcf81e03e104449e5/t/5aa2f62724a694a64be2a595/1520629288336/Dietel-and-Partners_Checklist_g.pdf)

### From Excellence in Giving:

- <http://excellenceingiving.com/case-studies/>

### From GMA:

- <https://www.gmafoundations.com/family-donor-advised-fund-grantmaking-strategy/>
- <https://www.gmafoundations.com/family-foundation-life-cycle/>
- <https://www.gmafoundations.com/agreeing-on-guidelines-for-meaningful-giving/>
- <https://www.gmafoundations.com/remain-anonymous-family-giving/>

### From Rockefeller Philanthropy Advisors:

- <https://www.rockpa.org/philanthropy-roadmap/>
- <https://www.rockpa.org/guide/finding-focus-philanthropy/>
- <https://www.rockpa.org/guide/operating-impact-choosing-giving-vehicle/>
- <https://www.rockpa.org/guide/impact-investing-introduction/>

### From TPI:

- <https://www.tpi.org/learning-center/strategic-philanthropy-a-primer-on-roles-and-strategies>
- <https://www.tpi.org/learning-center/raising-children-with-philanthropic-values>
- <https://www.tpi.org/learning-center/giving-together-a-primer-for-family-philanthropy>
- <https://www.tpi.org/learning-center/making-a-difference-evaluating-your-philanthropy>
- <https://www.tpi.org/learning-center/ramping-up-your-foundation>

### From 21/64:

- <https://www.ncfp.org/blog/2018/jan-what-next-gen-want>

### From Venture3Philanthropy:

- <https://www.forbes.com/sites/krisputnamwalkerly/2017/07/10/how-to-choose-the-right-philanthropic-advisor/#3d91a31b41bd>
- <https://www.insidephilanthropy.com/home/2017/2/21/advice-for-philanthropists>

## Additional Information about Co-authors



### Background

Arabella Advisors was founded in 2005 to provide strategic guidance for effective philanthropy. Since then, we've helped hundreds of clients representing more than \$100 billion in assets increase their philanthropic impact. Our network of clients and partners spans the giving sector and includes leading thinkers, government officials, business leaders, and foundations large and small—as well as many of the country's most innovative and effective individual and family philanthropists. The latter work with specialists from our Family and Individual Philanthropy team, a small group of experienced guides who understand the unique challenges and opportunities of family and individual giving. Using Arabella's vast network and platform, these specialized guides help our clients realize the greatest possible returns on their philanthropic investments, both in terms of their personal experiences with giving and in terms of the impact they create.

### Locations

We help philanthropists create impact across the nation and around the world. We have offices in:

- Washington, DC
- New York, NY
- Chicago, IL
- San Francisco, CA

### Overview of Services Provided

Arabella provides a full suite of advisory and implementation services for philanthropists. We meet you where you are, help you think through options and opportunities, and always look to deliver exactly the set of services you need to achieve your mission.

- **Strategy and Program Planning:** We can help you develop a mission and vision, identify issues to focus on, deepen your issue knowledge and uncover grantees, identify strategic partnerships, and construct evidence-based giving strategies.
- **Grants Management:** We can manage the entire grant-making process, enabling you to participate without administrative hassles.
- **Governance:** We can plan and facilitate board meetings and communications, create and maintain foundation policies and records, and more.
- **Engaging the Next Generation:** We can help you engage multiple generations in your family's philanthropy.
- **Impact Investing:** We can work with your family and advisors to design and evaluate mission-aligned impact investing strategies.
- **Fiscal Sponsorship:** We can help you launch, incubate and support innovative nonprofit projects through four fiscal sponsorship organizations we manage.



### Background

Brown Philanthropy Advisors specializes in providing philanthropic advice and consulting to individuals and families seeking to achieve change, solutions and sustainable impact with their philanthropic dollars. We are entrepreneurial in approach and have 40 years of management and consulting experience and knowledge to help donors achieve meaningful goals. We understand the challenges facing nonprofit organizations that depend upon philanthropic dollars as well as the diverse motivations of donors and funders who provide those dollars. Our desire as advisors is to facilitate the two to make this a better world.

### Firm Locations

Brown Philanthropy Advisors is based in New Hampshire

### Overview of Services Provided

Our specialized experience and expertise is greatest in the areas of oncology; physical, mental and behavioral health care; housing; employment; and education.



### Background

Dietel & Partners is a women-owned family business that grew out of the Dietel family's collective experience in the giving and receiving sides of philanthropy. One of the firm's co-founders was president of the Rockefeller Brothers Fund for two generations; the Dietel family is in the fourth generation of their own inherited wealth; and the entire team has deep roots in nonprofit work. Today, three partners and a full-time team provide counsel and support to their clients. Together, Dietel & Partners has almost 80 years' experience nurturing longtime relationships with some of America's most influential families who have trusted their approach to philanthropy.

Dietel & Partners tailors their advisory services to fit the wants and needs of each client. One size does not fit all. They are experienced helping a variety of donors—those new to philanthropy or seasoned givers, those with inherited or earned wealth, clients with family offices and grant-making infrastructures or those with none.

### Locations

- Yarmouth, ME
- Flint Hill, VA
- Seattle, WA

### Overview of Services Provided

- **Full-Service Philanthropy:** If you want to retain your anonymity and/or outsource your philanthropy, services include strategic planning, customized grant making, capacity-building, co-funding, stewardship and refinement.
- **Strategic Advisory Partner:** If you're interested in participating actively in your philanthropy but lack the time to dedicate to it, Dietel & Partners offers seasoned expertise to lead you.
- **Philanthropist-In-Training:** If you want to learn how to become an effective philanthropist, Dietel & Partners customizes your education and experience until you're self-sufficient.
- **Multigenerational Family Philanthropy:** When the responsibility of philanthropy is shared among family members and generations, Dietel & Partners delivers a positive process for its development.
- **Resource Enhancement:** If your establishment foundation wants to reimagine how it can create even greater impact, Dietel & Partners can help you leverage your efforts.



### Background

Excellence in Giving provides customized solutions to help donors set and achieve their charitable giving goals.

In 2002, Excellence in Giving founder, Al Mueller, combined his past experiences as a private wealth manager, nonprofit board member and personal donor to provide conflict-free giving advice to high-capacity families.

Over the last two decades, we have built a team of philanthropy experts in offices around the country to help donors find more joy and impact in their charitable giving.

### Locations

Excellence in Giving serves philanthropists across the country from offices in:

- Colorado Springs, CO
- Dallas, TX
- DC-Metro Area
- Boston, MA
- Newport Beach, CA

### Overview of Services Provided

Excellence in Giving provides customized philanthropic advisory services to support a donor's grant making, including:

- Defining giving strategy
- Facilitating giving meetings,
- Sourcing new giving opportunities
- Managing grant requests,
- Evaluating grantees,
- Post-grant reporting
- Organizing site visits and service trips
- Multigenerational family philanthropy

Our research team also provides solutions-based projects using proprietary tools and processes to help donors ensure future giving decisions are made with confidence and joy. Research projects include:

- Nonprofit evaluations
- Topical research
- Geographic assessments
- Impact measurements



## Background

GMA helps donors define and reach their philanthropic goals with expert advice and comprehensive services. We are an employee-owned firm, driven by our belief in the transformative nature of philanthropy.

Our full range of services—from strategy and program design to financial management and administration—is designed to help our clients achieve greater impact, build stronger connections, stay efficient and compliant, and chart a clear path to success.

GMA President Mary Phillips co-founded the firm in 1982 to help foundations achieve greater impact through more effective grant making. Today we serve as ongoing staff and consultants to a wide range of foundations and giving programs, focused on communities across New England, the USA, and the world.

## Locations

GMA Foundations is based in Boston, MA

## Overview of Services Provided

GMA customizes services based on your priorities. We can work with you to define and focus on your mission, build community ties, serve as your point-of-contact, structure your grant-making process, collaborate with other donors, understand your impact, and realize the potential of your giving.

GMA advisors, working on a project or ongoing basis, help navigate transitions and shape the future. We are frequently asked to:

- Identify high-impact funding opportunities
- Launch a new foundation or giving program
- Prepare for a change in leadership
- Research a field of interest
- Assess current strategy and impact
- Contemplate a change in focus
- Support philanthropic identity



## Background

Rockefeller Philanthropy Advisors (RPA) is a nonprofit that partners with individuals, families, corporations and major foundations to help make philanthropy more thoughtful and effective. Continuing the Rockefeller family's legacy of thoughtful, effective philanthropy, RPA remains at the forefront of philanthropic growth and innovation, with a diverse team led by experienced grant makers with significant depth of knowledge across the spectrum of issue areas. Since our founding in 2002, we have facilitated more than \$3 billion worldwide in grant making, establishing ourselves as one of the world's largest and most trusted philanthropic service organizations.

## Locations

RPA facilitates thoughtful and effective philanthropy in over 60 countries. Our offices are in:

- New York, NY
- Chicago, IL
- San Francisco, CA
- London, UK

## Overview of Services Provided

We advise established and aspiring philanthropists, foundations and corporations; manage innovative, early-stage nonprofits; and share insight and learning with our clients, our community and the sector. Our services include:

**Strategy and Consulting:** Whether you're just starting out in your philanthropic journey, hoping to explore new issues or approaches, or simply needing to step back and take a fresh look at your efforts, our thoughtful planning, thorough research and practical guidance give you the power to bring your philanthropic vision to life.

**Management and Implementation:** Our management services allow you to focus on your favorite aspects of giving and let us take on the rest. Whether conducting due diligence on a new nonprofit or facilitating a board meeting, our team can handle any and all aspects of grant making so that you can focus on your overall vision.

**Fiscal Sponsorship:** For donors whose funding goals require a neutral but professionally managed fiscal home, RPA offers comprehensive fiscal sponsorship services that can help you make an impact quickly and efficiently. Our staff can provide program, administrative and management support as needed, in strategy and capacity building, finance, tax and accounting, human resources, risk/liability, grant making and advisory services.



### Background

The Philanthropic Initiative (TPI) is a strategic philanthropy advisory practice that helps individuals, families, foundations and companies increase the impact of their giving locally, nationally and globally. TPI was founded on the belief that philanthropy has the power to transform. We continue to fuel the growth of high-impact philanthropy around the world through philanthropic consulting work as well as cutting-edge research, philanthropic education programs and initiatives with key allies. Since 1989, we have worked directly with hundreds of clients, serving as consultants and thought partners to ambitious donors and foundations that embrace innovative thinking in their efforts to find levers of change. The starting point for our work is the funder’s philanthropic vision, mission, values and goals. As thought partner or staff, TPI works across the continuum from visioning and strategy through implementation and evaluation.

### Locations

TPI’s headquarters are in Boston, MA, with staff located in the San Francisco Bay Area and North Carolina. TPI works with all types of funders throughout the United States and beyond.

### Overview of Services Provided

TPI’s broad range of services includes:

- Creating philanthropic strategic plans, including plans to ramp up in size or achieve greater impact
- Executing and assessing philanthropic programs, including grants programs, scholarship and college success programs, or other philanthropic initiatives
- Facilitating giving of families, companies, and other types of funders, including articulation of philanthropic goals, engaging the next generation, strengthening governance and supporting other needs
- Conducting in-depth research scans on social issues
- Supporting cross-border giving around the globe



### Background

Established in 2002, 21/64 has evolved from a program within the Andrea & Charles Bronfman Philanthropies into an independent nonprofit practice providing multigenerational advising, facilitation and training for next-generation engagement, especially within family philanthropy and other family enterprises.

Over the past 16 years, 21/64 has expanded its work with next-gen donors to help families and advisors with effective multigenerational governance. 21/64’s approach includes a mix of experiential learning and purposeful skill building, all keenly designed with insight about each generation. We specialize in serving families with funds in a client-centered, interactive and action-oriented way so that multiple generations can work, give and govern together more effectively.

### Locations

21/64 is based in NYC

### Overview of Services Provided

21/64 works on multigenerational engagement and decision making, offering:

- Facilitation to provide multigenerational advising on next-generation philanthropy and engagement
- Convening of next-gen peer groups to explore identities, legacies and philanthropic values
- Speaking to engage top thought leaders on next-generation philanthropy, multigenerational advising and family philanthropy
- Training for advisors and philanthropic leaders to learn to work more effectively with the next generation
- Tools to catalyze and advance conversations around purpose, vision and mission in family philanthropy and next-generation engagement



VENTURE3 PHILANTHROPY

## Background

As a leading, global philanthropic advisory practice, VENTURE3Philanthropy is committed to delivering an outstanding custom service experience of benefit to each client.

Our clients are those who share our passion for philanthropy: individuals, couples and multigenerational families; philanthropic institutions; and enterprises.

Responding to a greater service calling, our clients also include faith-based or personal spirituality and giving perspectives, as well as Catholic foundations and organizations committed to justice and mercy in their focus to serve the needs of others.

## Locations

VENTURE3Philanthropy is based in Michigan

## Overview of Services Provided

VENTURE3Philanthropy is primarily invited to serve in three key roles: as a philanthropic advisor in giving strategies and implementation; as an organizational partner co-designing programs and facilitating meetings and conversations; and as an executive leader strategist in executive search, onboarding, and executive coaching and mentoring.

Our unique, client-centered approach reflects a successful leadership track record spanning three decades of experience, serving all three aspects of civil society—the public, private and philanthropic sectors.

Our passion remains the same—helping clients venture the nexus of all three sectors in ways that uniquely animate generosity for deeper meaning and transformation, motivated to “give while living,” and prepare clients to create a “lasting legacy” for those who personally mean the most.



**Private Donor Group**

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