



MAPPING THE FUTURE OF PHILANTHROPIC ADVISING

OCTOBER 2022
SAN FRANCISCO

THE AMERICAN COLLEGE
CENTER FOR
PHILANTHROPY
AND **SOCIAL**
IMPACT

GROUP AGREEMENTS

We ask all attendees to honor these agreements to ensure everyone is welcomed, encouraged to listen openly and speak honestly, and treated with respect.

Show our support—Each of us is balancing multiple personal and professional roles and commitments, some of which may involve loss and trauma. We'll all try our best to be fully engaged and give ourselves and each other grace when we aren't.

Own our impact and perspective—We'll speak respectfully and be willing to edit what we say so it comes across better. We'll use "I" statements and avoid speaking on behalf of others. And we'll avoid negative body language unless willing to talk openly about our reaction.

Listen for understanding—We listen earnestly to others for greater understanding of different and shared perspectives. We assume best intentions when others speak. We listen to truly understand why someone might think differently than we do.

The courage of being comfortable with discomfort—We may encounter conflicting viewpoints and difficult conversations, whether about competing business models, power dynamics in philanthropy and professional services, or inequities and divisions in society. We know thoughtful civil discourse can lead to greater understanding.

Take space, make space—If we typically are quiet, we practice speaking more. If we typically fill silence with our voice, we practice speaking less. Know that some ideas may be new for some attendees. Their questions may prompt the conversation group members need to learn and process the ideas.

No sales pitches—We've gathered to build a stronger field of philanthropic advising. We were invited more for the skills, perspectives, passions, and experiences we bring as individuals, and less as representatives of an organization or sector.

Stay curious and creative and have some fun—We'll probably challenge some norms in philanthropy, professional services, and donor/client engagement. Those norms can come from euro-centric, White, patriarchal, or privileged histories. We'll encourage each other to think differently, and ideally do so with some grace and humor.

SUMMIT

LOGISTICS

Primary contacts:

- Dien Yuen, cell (267) 637-2984, dien.yuen@theamericancollege.edu
- Tony Macklin, cell (317) 250-3805, tony@tonymacklin.com - contact Tony about the agenda and related materials
- Tyra Nickell, cell (515) 473-4085, tyra.nickell@theamericancollege.edu - contact Tyra about registration, hotel, and meal logistics



MAPPING THE FUTURE OF PHILANTHROPIC ADVISING

HOTEL NIKKO
222 MASON STREET
SAN FRANCISCO

Public health and safety: We will follow public health guidelines and expect all participants to be vaccinated. You will be able to choose a wristband color-coded to the level of contact you are comfortable with.

Casual/Comfortable Dress: Please dress comfortably. The West Coast has a more laid-back vibe, so business casual or casual is encouraged. Temperatures typically reach 70-71°F and evenings will be in the low-mid 50's.

Parking: Hotel Nikko offers valet parking only (the entrance is at 188 Ellis Street). For self-parking, please use Mason O'Farrell Garage (325 Mason Street, across from Hotel Nikko) or Union Square Garage (333 Post Street, 10 minutes walking distance from Hotel Nikko).

Summit Goals: We hope to create:

- Opportunities to build personal connections and trust that could lead to future collaborations and referrals
- Shared understanding of the field of philanthropic advising and trends shaping its future
- A collective vision for a stronger field, or even a recognized profession
- Goals for collaboratively developing new frameworks, programs, services, products, and more that can improve the field
- Knowledge of ways to improve your philanthropic services and attract and retain talent
- Action items for 2023 and beyond

LinkedIn: Don't forget to join our [LinkedIn group](#) to continue the conversation after the event and learn about follow-up activities.

AGENDA

WEDNESDAY, OCTOBER 12

- 5:00-6:30 pm Welcome Reception (optional)
Hotel Nikko Kanpai Lounge, 1st floor
- 7:00 Dine-Around Groups (optional, no-host)
- [Bartlett Hall](#) - upscale bar bites and gastropub
242 O'Farrell St (one block walk)
- [Bota Tapas and Paella Bar](#) - authentic Spanish style
490 Geary St (2 block walk)
- [Burma Love](#) - modern Burmese cuisine and shareable plates
8 Mint Plaza (.3 mile walk)
- [Miyabi Sushi](#) - relaxed space specializing in Yakitori grilling
115 Cyril Magnin St (one block walk)
- [Sam's Grill & Seafood Restaurant](#) - historic seafood and martini joint
374 Bush St (.6 mile walk)

THURSDAY, OCTOBER 13

- 8:15 am Registration and Breakfast
Peninsula Room, 25th Floor
- 9:00 Opening
Golden Gate Room, 25th Floor
- Creating new connections; sharing the interests, skills, and philanthropic passions we bring.
 - Welcome and setting the stage.
- 9:45 Context and Trend Mapping Activities
- What do we know about the emerging field of philanthropic advising and consulting? What trends will influence our work in the next 10 years?
 - Voices from the field: What pain points are we facing?
- 10:30 Break
- 10:45 Vision for the Philanthropic Advising Profession
What should a thriving field of philanthropic advisors and consultants look like in 2030? What would you and your firms need to succeed in that vision?

THURSDAY, OCTOBER 13

- 11:45 Lunch
Golden Gate Foyer, 25th Floor
- 1:00 pm Small Group Idea Labs Creating Concept Posters
Peninsula and Bay View Rooms, 25th Floor
Should we, and how might we...
A. Increase visibility, understanding, trust, and demand for philanthropic advising by donors and their advisors?
B. Attract and retain a pipeline of talent that reflects our nation's changing demographics and expectations of philanthropy?
C. Develop shared expectations of competencies (attributes, skills, knowledge) and scale the related professional development?
D. Increase access to shared tools and insights to scale our work and impact?
E. Develop shared and transparent frameworks for ethical standards? Potentially create accountability around them?
F. Create a more visible and connected profession, able to advocate for itself?
G. Solve other pain points and hopes the group creates in the morning?
- 2:15 Break
- 2:30 Repeat Idea Labs (rotate to new lab)
Peninsula and Bay View Rooms, 25th Floor
- 3:45 Bring concept posters, reconvene - *Golden Gate Room*
- 4:00 Concept Contest - *Golden Gate Room*
Which parts of which concepts stand out for the group? Which are actionable soon? Who wins for the most creative or bold ideas? (Prizes will be awarded!)
- 5:00 Break
- 6:00 Group Dinner sponsored by The American College
888 Restaurant at [China Live](#), 644 Broadway, San Francisco
• Meet there at 6:00 pm drinks, 6:30 pm dinner
• Welcome by George Nichols III, President and CEO, The American College of Financial Services

FRIDAY, OCT. 14 AGENDA

- 8:15 am Registration and Breakfast Available
Peninsula Room, 25th Floor
- 9:00 Opening
Golden Gate Room, 25th Floor
Checking in: What's on your radar from yesterday? What are we missing about the future of this profession, what future clients will need from us, the communities we serve will need from us?
- 9:30 Deeper Dive Conversations (co-creating change)
Golden Gate, Peninsula, and Bay View Rooms, 25th Floor
Fleshing out a few priority concepts from Thursday, honing them to solve pain points in the profession, and helping you prepare for what comes next.
- Clarifying competencies, qualifications, and education and professional development pathways
 - Tools to grow the base of clients/donors using philanthropic advisors, help them identify needs and navigate options
 - Other items the group prioritizes
- 10:30 Break, Check-Out
- 11:00 Action Planning to Achieve our Vision
Golden Gate Room
What are low-cost wins? What should happen in 2023? By 2025? Who will we involve in planning and implementation? What data do we need?
- 11:45 Closing Activities and Lunch
Golden Gate Foyer
What action items will you take back to your work? What connections do you want to strengthen next? Who should be involved in future versions of these conversations and where could they be held?
- 1:00 pm End

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PERSONAL ACTION PLAN

<p>A-Ha's</p> 	<p>What 3 ideas or conversations stuck with you?</p>
<p>Connections</p> 	<p>Who do you want to know better or follow up with? What do you want next from those relationships?</p>
<p>Personal Growth</p> 	<p>What do you want to learn or do next to improve as a philanthropic advisor? What about your work might need to be challenged or modified?</p>

<p>Team Growth</p> 	<p>What do you want to do next to improve your team's philanthropic advising work? (e.g., skills, knowledge, cultures, biases, business models, resources, connections)</p>
<p>Client Growth</p> 	<p>What from this Summit do you want to explore with current clients or use to grow or change your client base?</p>
<p>Field Building</p> 	<p>How might you or your employer help implement ideas from this Summit to strengthen the philanthropic advising profession?</p>

**Other To-Do's
& Reflections**





OUR WORK IN THIS MOMENT OF NEED

The field of philanthropy is evolving faster than ever, with new knowledge and innovation, hazards, and even harmful practices to avoid. The events of 2020 created urgency in philanthropic responses, shed light on the incredible growth of donor-advised funds and sparked conversations on how to achieve greater impact. Increased awareness of issues such as structural inequities, climate change, and civic engagement offer opportunities for meaningful conversations and collaborations with donors and advisors across for-profit and non-profit sectors.

Our Center is designed for this moment of need, change, and action. Our strength is in philanthropic advising and designing professional development programs delivered in models that are accessible for donors and advisors. We believe in delivering a fresh and rewarding lifelong journey for our audience, building on the momentum of CAP® and Purpose School, and finding our niche on the “edges” of philanthropic advising.

We believe it is time to match the challenges we face today with renewed ambition for making a difference. That potential is what the Center is built for – to discover new possibilities, know-how, meaning and an intentional network.

We invite you to join us and co-build a Center to advance our profession and community!



Dien Yuen, JD/LLM, CAP®, AEP®
Executive Director
Center for Philanthropy & Social Impact
Blunt-Nickel Professor of Philanthropy

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“Purpose School was just the right mix of ideas and people at the right time. It opened my eyes to new possibilities and I connected with Fellows, along with family and friends, in new ways. It's already informed decisions I've made.”

- Purpose School Fellow, 2021

OUR WORK



Interest in social action is high, and there is a gap among high net-worth executives and entrepreneurs who have been very successful but have yet to devote significant amounts of time and effort to social change. **Purpose School** is designed for those looking to take their practice and social impact to the next level in any number of directions. Drawing on new friendships, conversations with world-class experts, and a PS360 Notebook, Purpose School Fellows discover new ways to make a difference in various parts of their lives.



The **Advisors of Color** initiative supports the changing face of the philanthropic advisory profession. Advisors are a part of the communities and want to make their world a better place. They are also key players in the civil society conversation as they help families explore purpose and significance - and deploy resources - within the family and/or to the community. The lack of diversity in the philanthropic advising profession contributes to communities being underserved in the advisory space. This can lead to negative economic and social impacts for individuals, families, and local communities.



Philanthropic advising has become institutionalized, professionalized, and credentialed with new networks and tools created for advisors. As the profession continues to mature and the field evolves, further research is needed to identify opportunities that will position advisors to increase philanthropic impact in their communities in the years ahead. **The Impact Lab** allows us to conduct research into the field, gain a current and objective understanding of who advisors are, how to support them, and create the tools required for their work. We aim to provide fresh insight into the career paths, challenges, successes and the overall growth of the philanthropic advising field.



The **Advanced Practitioners Series** targets senior advisors who wish to master their craft and learn from respected practitioners in the field. Designed as opportunities to dive deeper into a topic with a small group of like-minded practitioners, these sessions foster new connections and encourage multi-disciplinary teamwork as the participants work on case studies and activities together. Our goal is to offer the space and opportunity for senior advisors to join a community of practice, engage in lively discussions, and apply what they have learned immediately to further the philanthropic conversation.

THANK YOU TO OUR SUPPORTERS

**CHRIS BLUNT AND
GRETCHEN NICKEL**



LEON A. LEVY

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