

# Philanthropy Advice Course

Initiative for Strategic Philanthropy and Intelligent Resources in  
Central and Eastern Europe

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## Course A

**Session 1: 23-25 March 2015, Sofia, Bulgaria**

**Session 2: 07-09 October 2015, Croatia**

## Course B

**Session 1: 09-11 June 2015, Warsaw, Poland**

**Session 2: 08-10 February 2016, Budapest, Hungary**

INSPIRE is initiating two further courses on philanthropy advice. The courses are intended to enable the philanthropy advisors to build an internal capacity in order to address donors' philanthropy needs.

According to research, majority of donors recognize the need for expert advice on philanthropy. Yet, the majority of wealth managers feel they are not adequately trained to discuss philanthropy with their clients.

Efforts to standardize services become more important for supporting donors in their steps in the philanthropic journey. Better networks are the key to developing the sector and standardizing philanthropy advice services. Therefore INSPIRE organizes the Philanthropy Advice Courses to support thought leadership, to build best practice approaches and to extend philanthropy advisors' capabilities.

By attending the course, philanthropy advisors will acquire the necessary skills and knowledge to ensure a first level of support within their organizations for advising donors regarding their philanthropic expectations.

The training course covers the following aspects:

- the characteristics of strategic philanthropy; solving problems at their root, identifying how to leverage change
- a strategic framework for philanthropy: defining problems, setting goals, theories of change, evaluation, communication strategy
- step by step in donor advising: establishing norms, eliciting areas of interest, introducing the donor to strategic philanthropy, teaching due diligence, reaching decisions about funding, evaluation and donor satisfaction
- conducting site visits - observations and learning
- donor communications
- role-plays and donor interviews.

We look forward to welcoming participants from your organization.

## Program structure

An intensive five-day course, split into two modules (1. Essentials of Philanthropy Advice and 2. Sharing the Experience), will equip participants with the skills to build dynamic donor networks, and with a deeper understanding of how to partner with donors and family foundations to make a significant contribution within their communities.

The goals of the modules are:

- To introduce participants to the elements of strategic philanthropy and advanced thinking on working with donors and
- To demonstrate to participants how they can work with donors to help donors be strategic and effective.

Summary of hoped for aims/benefits

- increased confidence in working with donors;
- a client-centric approach which is appreciated by donors (and their professional advisers);
- a strategic approach to philanthropy and the creation of grant portfolios for client funds;
- better donor facilitation, education and networking, and ultimately...
- increased revenues into the communities that they serve.

## Who should attend?

The course is intended mainly for chief executives and senior fund development staff of philanthropy support organizations and community foundations from Albania, Belarus, Bosnia Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Kosovo, Macedonia, Moldova, Montenegro, Poland, Romania, Russian Federation, Serbia, Slovakia, Turkey and Ukraine.

The course is also open to other professionals who advise clients with charitable intent.

## Registration

To enroll for any of the two Courses (A or B, depending on your availability) please complete the attached application form and submit it by the **26<sup>th</sup> of January 2014** at [stefan@arcromania.ro](mailto:stefan@arcromania.ro). An international evaluation committee will assess the applications. The successful candidates will be announced in the beginning of February 2014.

## Agenda for the first workshop

Combining the expertise of prominent professionals in the sector, this 5-days program will give the opportunity to create a link between theoretical knowledge and implementation. The agenda for the first module is presented here, while the agenda for the second module will be finalized and sent to participants after attendance of the first module.

### Day 1

9.00am - 9.45am	Charity versus Strategic Philanthropy
9.45am - 1.00pm	Strategic Framework (includes 20 minutes break)
1.00pm - 2.00pm	Lunch
2.00pm - 4.30pm	Case Study Discussion

### Day 2

9.00am - 6.00 pm	Living Case Study Day (study visits to 3 organizations active in the health field to understand their theory of change and experience similar work with the donors as a part of the donor advice process).
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### Day 3

9.00am - 10.20am	Step By Step in Donor Advising
10.20am - 1.00pm	Working with donors: role plays (includes 20 minutes break)
1.00pm - 2.00pm	Lunch
2.00pm - 3.30pm	Discussing assignment and plans till the next workshop. Evaluation and closing.

## Trainer

### Fenella Rouse, expert in donor services and philanthropist

Ms Rouse is Senior Advisor at the Institute for Philanthropy. She is also a volunteer at the School for Social Entrepreneurs, where she co-ordinates mentoring and at the Crossroads Women's Centre, where she works with women seeking asylum in the UK. She is a member of The Funding Network and the Network for Social Change, two donor giving circles in the UK. Until 2000 Fenella was CEO of two New York based family foundations (1991-2000 ) and before that an attorney with and then Chief Executive for two national US non-profits for a period (1984 - 1991) that included their merger. Fenella has advised individuals and families on philanthropy in both the UK and the US; she is a trained mediator and a member of the New York State and US Federal bars, educated at Columbia Law School, US (JD) and the University of Exeter, UK (BA).

## Coordination and financial support

This initiative is coordinated by the Association for Community Relations, Romania in partnership with the Bulgarian Donors Forum, Akademy for Philanthropy Poland, Catalyst Balkans and in cooperation with several other philanthropy support organizations and networks in the region. INSPIRE benefits from the financial support of C.S. Mott Foundation.

The course fee is \$1,200 for attendance of two course modules, plus transport, accommodation and meals at the training venue. If you or your organization cannot pay for the course, you can request financial support. In case of financial support being approved for your application, we are looking for a minimum contribution of \$250 towards transport, accommodation and meals costs.

## About INSPIRE

### Who we are

INSPIRE is a community of philanthropy development leaders, practitioners and thinkers from Central and Eastern Europe who contribute with their experience, resources and connections to the advancement of the strategic philanthropy field.

### Our Mission

The mission of INSPIRE is to provide a forum for leading thinkers, advisors, and philanthropists. We provide opportunities to engage in dialogue to increase the effectiveness, collaboration, and visibility of philanthropy in our local community and more broadly in the region of Central and Eastern Europe.

### Our Objectives

- To encourage and inspire philanthropy in our community, within each of us, and with donors.
- To provide a regional network of philanthropically oriented advisors who expanding the personal resources and collaboration capabilities of members so they may promote philanthropy in their practices
- To provide opportunities for learning about philanthropic practices broadly that relate to improving our communities and society

### Our Approach

INSPIRE is based on decentralized leadership, with CEE initiatives supporting further local and national initiatives. Also, it stimulates initiatives and contribution from diverse community members and encourages leadership from a variety of countries, forms of organization and levels of work (local/national, community, private, issue based foundations, networks and associations, service centers).

### Join in

INSPIRE seeks to engage visionary, committed, autonomous, resourceful and reflective individuals who would like to join us and each other on the journey of building stronger strategic philanthropy close to home.

**General contact for INSPIRE:**

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**Contact for course applications:**

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