JUNE 2019

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EVENT UPDATES

CONFERENCE ON PHILANTHROPY 2019: Responsive Philanthropy

The AIP Conference on Philanthropy 2019: Responsive Philanthropy, which took place May 22-24, 2019 in Washington, DC was a great success! A special thank you to all our attendees, speakers, and sponsors who made this event possible.

In the coming weeks, AIP will be sharing summaries from a conference session or special event. Be sure to check your email for this information or follow the link below to see summaries that have already been released. These summaries have been written by board and conference committee members. We hope these snapshots give you a better insight into the conference and we encourage you to save the date for our 2020 conference, which will take place in May 2020 in San Francisco (final date and location TBD).

Read summaries here.

UPCOMING WEBINARS

TUESDAY, JUNE 18, 2019, 3:00 pm ET - REGISTER
Sustainable, Impact, and ESG Investing in the Philanthropic Advisor World
Presented by: Jeff Gitterman, Co-Founding Partner, Gitterman Wealth Management
During this presentation Jeff will explain the essential differences between ESG (Environmental, Social, and Governance Investing), SRI (Socially Responsible Investing), and Impact Investing. He will also clarify the myths surrounding these investment strategies, and explain how big data has now made it more possible than ever before to engage in values based investing without sacrificing returns.

TUESDAY, JULY 16, 2019, 3:00 pm ET - REGISTER
How to Manage Competing Goals for Smarter Philanthropic Decisions
Presented by: Ian David Moss, CEO, Knowledge Empower
Philanthropic planning involves the complex interaction of numerous and sometimes competing priorities, including the impact the donor or family wants to have on the world alongside other motivations such as the desire for recognition or relationship preservation. Ultimately, donors need to weigh these factors against each other and come to a decision about how to move forward. This session will discuss a range of techniques to help clients consider the practical impacts of various options in a holistic way, integrating different types of philanthropic goals alongside other considerations important to the donor. Using case studies and interactive facilitation, we will explore fundamental concepts of decision analysis and how they apply to a philanthropic context.

TUESDAY, NOVEMBER 19, 2019 - REGISTER
Assessing Philanthropic Impact
Presented by: Wendy K. Schneider, M Ed., CFRE, Senior Advancement Officer, The National Judicial College
Is it important for philanthropic advisors to proactively manage donor giving expectations and impact? Experienced donors know how important it is to have reliable, relevant information about the programs they fund. Assessment, done in tandem with grantees, can provide this information. Without it, donors risk missing their planned giving outcomes. With it, they can orient their giving.

This session will review various ways to assess philanthropic impact and its importance in leveraging philanthropic impact. It looks at what assessment can accomplish and what it has difficulty measuring. It sets out a series of questions donors can ask as they consider how to proceed with their philanthropy. And finally, it details some of the limitations inherent in trying to understand exactly how donors’ dollars are working.
UPCOMING POWER CALLS

These conference calls are intended to be a space to create peer discussion, problem solving, and thought leadership. Each call is limited to 20 AiP members – ideally a mixture of those who have experience to share as well as those with a thirst for more knowledge. Save the date for these upcoming calls - additional details and registration coming soon!

- June 25
- July 30
- August 27
- September 24
- October 29
- December 3

RESOURCE LIBRARY

View member only resource library here.

WEBINAR and POWER CALL RECORDINGS

Members can view past webinars and listen to Power Call recordings here.

In future issues of AiP At-A-Glance we are hoping to include relevant case studies. If you have a cast study you would like to submit, please email admin@advisorsinphilanthropy.org.

UPCOMING CHAPTER EVENT

LA AIP

Tuesday, June 18, 2019

LA AIP: Wear Your Values: Making Fashion A Force for Good

The fashion industry valued at $3 trillion is one of the largest employers of women. In Los Angeles alone there are 45,000 garment makers, of which 60% are women. But with apparel production at 100 billion pieces a year to clothe just 7 billion people on the planet, the industry’s hyper growth has devastating impact on climate, water, natural resources and people. Join us for a solution focused conversation with experts on the front lines of advocacy, teach innovation and sustainable business models that are disrupting fashion’s reliance on over consumption to build an industry that does more good for women and our planet.

Learn more and register here.