CONFERECE 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.

Over the last month AIP has been sharing summaries from a conference session or special event. We hope you’ve enjoyed these summaries and here is the latest....

Disaster Philanthropy: Thinking Strategically About the Worst of Times

Presented by: Robert G. Ottenhoff, Center for Disaster Philanthropy

Here in the Pacific Northwest, we are known for our rainy winters and springs. The persistent dampness and temperate climate is what gives Washington State, where I live, its name, The Evergreen State. But in the past two years, I’ve witnessed the emergence of a new time of year, wildfire season.

Epic drought for the past several years has left the entire west coast parched and on the verge of ignition. Of all the horrible fires last summer, nothing was as devastating to human life as the Camp Fire which killed at least 85 people. The 2018 wildfire season was the deadliest on record.

Though wildfires are prominent in the West, the summer months are also known for hurricanes in the South and tornadoes in the Midwest. But not all disasters are due to weather. They also include mass shootings, the refugee crisis and other man-made atrocities. All are horrible to witness and tug at our heartstrings. Calls for action are urgent and our instinct is to lend a hand. We want to help victims. We want to support first responders. So, we give.

In May, I attended the Advisors in Philanthropy Conference in Washington D.C. where I went to a plenary session on giving in the wake of disasters, and it was an eye-opening experience.

Robert Ottenhoff, CEO of Center for Disaster Philanthropy (CDP) gave an impassioned presentation to the advisors in the audience about what is truly helpful in natural and man-made disasters. He told of how emergency responders classify emergencies as Sudden Onset (Hurricane Harvey, Pulse Shooting), Slow Onset (Ethiopian famine), or Complex (Syrian refugee or Southern border crisis) and how the nature of response is different for each. Developing intentionality around funding disasters is getting greater attention after a seemingly incessant spate of epic events due to the climate crisis and gun violence.

He spoke about how funders are (re)considering their role in preparation for and in response to disasters, what we have learned from some of the recent, large events, and finally, how we can best respond in ways that are proven to be beneficial, both in the short-term and long-term. Mr. Ottenhoff’s presentation shared useful tips and approaches for donors about how best to incorporate disaster giving in their charitable portfolio.

He began with the numbers of how we currently give. In the US, disaster giving is quick off the mark and reactive:

- 1-4 weeks following a disaster: Over a third of private giving is complete
- 1-2 months following a disaster: Two-thirds of private giving is complete
- After 6 months: All giving stops, yet full recovery often takes YEARS.

About a third of all US households gave to disasters giving an average of $81, but the vast majority of that giving is in the immediate days of the tragedy. What we don’t often hear in the media is the still dire needs of a community once the tragedy has moved out of the news cycle. Consider this from CDP:

When disaster drives people from their community, it can result in:

- Increased taxes
- Loss of school revenue and teachers
- More public debt shared by fewer taxpayers
- Increased utility costs
• Homelessness
• Loss of workforce and business development opportunities

And for those who stay, they often face . . .

• Mental health issues (e.g., loss of hope, increased despair, PTSD, etc.)
• Increased suicides, divorce, drug and alcohol abuse, early death
• Lack of community trust

As these events become more regular, it’s crucial that individual donors, and especially corporations and foundations, be more thoughtful and strategic in their giving. But the challenge in doing so is obvious. When disaster hits, the flurry of urgent appeals on social and traditional media can be overwhelming; leading many to donating the wrong things to the wrong non-profits at the wrong time. One striking anecdote that Mr. Ottenhoff shared was the number of coats and jackets sent to Hurricane Harvey victims (in Texas), which not only could they not use, but they also had to spend precious resources finding a way to store, then donate them elsewhere.

The CDP is a specialist in the area and they play an important role in helping funders go from being reactive to strategic. He concluded by reminding us that all funders are disaster funders and that catastrophic events tend to fall outside of normal grantmaking guidelines for the average donor. With that said, the aftermath of emergencies reach far and wide affecting housing, vulnerable populations (low income, seniors, people of color), education, health, and more. It is crucial that all donors consider the full arc of disasters and the full scope of their needs for an effective recovery.

While it is common to think of them as discrete events with fixed beginnings and ends, emergency first responders generally think of disasters in “cycles” that happen before, during, and after a devastating event: mitigation, preparedness, response, and recovery. Understanding what is needed in each phase can help the donor decide where they can provide the greatest need by the strategic deployment of their time and treasure.

Mr. Ottenhoff left the group with key takeaways for effective disaster philanthropy: Give cash. Fund local. Fund long-term. Fund medium-to-long-term recovery efforts. Learn from others.

Stephanie Ellis-Smith, CAP®, Phila Engaged Giving
AIP Board Member

Read all summaries here.

UPCOMING WEBINARS

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, AUGUST 20, 2019 • Save the Date, registration opening soon!

TUESDAY, SEPTEMBER 17, 2019 • REGISTER

Revolutionized Philanthropy: A Bank, a Foundation, and a Millennial Walk Into a Bar

Presented by: Vivienne Hsu, Founder and CEO, LENDonate

Join this webinar to learn about a unique solution to address the age-old challenge in philanthropy: If I am already near my maximum donation allocation, how can I continue to financially support the causes/nonprofits that are important to me? Packed with use cases and practical actionable steps so you can better help your clients achieve and maximize their social impact goals.

Philanthropy and impact investment are two approaches with the same objective - to yield positive social impact - but have primarily stayed in their separate lanes. What if these two outcome driven disciplines were integrated to create a holistic solution in supporting nonprofit missions? A structured collaboration amongst banks, foundations, and individuals could provide a more efficient way to improve funding for affordable housing, the arts, the environment, and more. Speaker will give recent examples of individuals using this holistic approach to achieve social program expansion, “program rescue”, and growth acceleration.

This collaborative ecosystem enables creditworthy nonprofits to secure financing from previously untapped sources while receiving attractive loan rates and donations in a streamlined process. Socially minded investors choose the interest rate they wish to offer; they can choose to include a donation now, or later by converting the loan to donation. Such an ecosystem allows capital to flow more freely in the social sector by developing an expressive marketplace that connects affordable capital with impactful projects.
THE SON WHO NEVER FORGOT...
Presented by: R.J. Kelly, Founder & Chief Visionary Officer, Wealth Legacy Group®

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!

- TUESDAY, AUGUST 27, 2019 - REGISTER
- TUESDAY, SEPTEMBER 24, 2019 - REGISTER
- TUESDAY, OCTOBER 29, 2019 - REGISTER

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
AIP OC
Thursday, August 15, 2019: Member Appreciation and Educational Event

For this Orange County Advisors in Philanthropy (OC AIP) Educational Event, Kyle Casserino, Charitable Planning Consultant at Fidelity Charitable will share insights on how he has implemented Charitable Planning Essentials, Gifting Illiquid Assets, Family Philanthropy, and Impact Investing with his clients.

Fidelity Charitable® is an independent public charity that has helped donors support more than 278,000 nonprofit organizations with nearly $35 billion in grants. The mission of Fidelity Charitable® is to grow the American tradition of philanthropy by providing programs that make charitable giving accessible, simple and effective, Mr. Casserino assumed his current role in 2019, and has been with Fidelity Charitable® across multiple roles since 2013.

More Information