

The Business of Philanthropy Advising: How far should we go?

Recommendations for Community Foundations in the UK

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The Business of Philanthropy Advising: How far should we go?

Introduction

As Community Foundations we are passionate about making a difference and achieving our social mission, distributing donated funds wisely and effectively with and for donors. We are unique and exceptional in the work that we do to ensure our communities are thriving. However, we have an array of competitors offering what may look on the surface to be a similar 'offer' to our own; a philanthropic journey via great advice. How do we compete confidently with them, demonstrating that we can offer the best philanthropic experience? And, at a time of transition in many places for Community Foundations due to recession, changes in Government policy and public funding cuts, how do we succeed? This Business of Philanthropy Advising recommendations report aims to provide some answers as we move develop in the field of philanthropy advice and take ground-breaking steps to formalising our work in the UK.

This report is a summary of work over a two year period, debating, consulting and developing our philanthropy advising offer with senior Community Foundation practitioners. It includes the results of two online surveys with responses from around 20 senior UK practitioners in summer 2013 and autumn 2014 that tracked their beliefs, wishes and best practice in Community Foundation philanthropy advising as well as the perceived competitors in the field. It also aims to complement the Philanthropy Advising Framework to be launched in 2015 for Community Foundations in the UK, developed by Community Foundation practitioners, including a Steering Group I have chaired since 2013, and CASS Business School via consultancy research. This framework will be a legacy to the Philanthropy Fellowship pilot during 2012 to 2014, funded by Esmée Fairbairn Foundation via UK Community Foundations.

This has been work in progress in this developing field since summer 2013 and as learning has been gained through this project it has been shared in order to contribute thinking and best practice with Community Foundations, including:

- At the Community Foundations of Canada Conference in Winnipeg in June 2013;
- At the UK Community Foundation Conference in September in Bristol 2013;
- Via the UK Steering Group for Philanthropy Advising since 2013;
- UK Community Foundations Symposium in November 2014 in London;
- CASS Business School for their consultancy on developing the Philanthropy Advising Framework in late 2014.

This report's findings will be shared with Community Foundation practitioners committed to developing a high quality philanthropy advising offer, especially via:

- UK Community Foundations, its 46 members and its Board, including at their conference in September 2015;
- Community Foundations of Canada and its 191 members, including at their conference in May 2015;
- Clore Social Leadership Fellows in the UK, including via their website;
- Visiting 2015 Senior International Fellows at City University of New York's (CUNY) Center on Philanthropy and Civil Society in March 2015.

This research has been funded by the Clore Social Leadership Programme (CSLP) as part of my work as a 2013 Clore Social Leadership Fellow until February 2015 in my specialist field of philanthropy.

My overall aim with this work is to support Community Foundations to formalise and establish high quality philanthropy advising as an accredited and universally credible offer to community philanthropists, enabling communities to be thriving and advisors to be formally recognised in their field as they are in North America.

Cathy Elliott BA (Hons) MInstCert

2013 Clore Social Leadership Fellow

Chief Executive of Community Foundations for Lancashire and Merseyside & Trustee of UK Community Foundations

2009 Senior International Fellow of Philanthropy & Civil Society Faculty, City University of New York

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Executive Summary

The work achieved in the Philanthropy Fellowship UK pilot, funded by Esmée Fairbairn from 2012 to 2014, led by nine Community Foundations in this county, working in collaborations with many others, has driven up standards in our offer to philanthropists. We as a Community Foundation movement are increasing in competence and capability in our philanthropy advice in the UK due to a greater focus on facilitating private funds, especially since the end of major Government programmes in 2011/12. In comparison to our competitors we continue to be best placed to expertly facilitate philanthropy due to our connecting role between philanthropists and communities. The creation of the Philanthropy Advising Framework by Community Foundations with CASS Business School, supported by UKCF is a legacy to the Philanthropy Fellowship UK and provides a milestone in our ambition to compete effectively in the advising market place. This report provides 14 recommendations to support this ambition.

CASS Business School believes that Community Foundations are the biggest driver of philanthropy in the UK, and their consultancy research, including the creation of the Philanthropy Advising Framework, will enable Community Foundations to establish a formal philanthropy advising approach that does not exist as yet in the UK; they consider this to be simply “ground-breaking”.

“There are no other (known) frameworks documenting key competencies in the area of philanthropic advice in the UK, nor any specialist, practical training provision available to develop such skills.” CASS Business School, December 2014

As we take our next steps in the philanthropy advising field we must ensure the following for our future success:

- a) Be aware of our place in the marketplace, promote our Unique Selling Points in comparison to our competitors and ensure high standards in delivery;
- b) Ensure we are professionally confident in our offer to philanthropists, differentiating ourselves from the competition, due to our community knowledge and ability to at least offer monitoring, if not social impact reporting;
- c) Up-our-game in our advising offer, especially to increase our capability, competence and confidence, including training and professional development from within the Community Foundation movement and from external providers;
- d) Pilot, review and embed the Philanthropy Advising Framework, developing or creating essential tools to support all Community Foundations;
- e) Embed best practice over a number of years, working from the Framework, exploring the possibility of including practice standards in Quality Accreditation Five in 2019;
- f) Facilitation and support from UKCF to regularly review and develop the Framework.

The most important thing is to keep the Philanthropy Advising Framework alive and the exchange of best practice in the UK and with peers internationally in order for Community Foundations to compete effectively in the advising market place, offer consistently high standards and to continue to be relevant. This report aims to support this.

With Thanks

Thanks to the following people and organisations for their support and involvement in producing this report:

- The UK Philanthropy Advising Steering Group of Ronnie Brown, Sally-Anne Greenfield and Derry Nugent;
- Fiona Ash, Dr Peter Grant and Caroline Copeman of CASS Business School;
- Dame Mary Marsh and Liz Lowther of Clore Social Leadership Programme;
- Jane Humphries and Cindy Lindsay of Community Foundations for Canada;
- Stephen Hammersley and Mark Greer of UK Community Foundations (UKCF).

The Business of Philanthropy Advising: How far should we go?

Section 1. Mind The Gap: Looking at the Market Place

The market place for philanthropy advice is ever growing and there are a number of options available to philanthropists in the UK.

In the private sector there are offers from individual consultants, private banks, solicitors firms and other professional advisors

or bodies. In the social sector there are individual organisations such as Charities Aid Foundation, Institute for Philanthropy and the National

Philanthropic Trust. There are also organisations giving support to philanthropy advisors such as Philanthropy Impact, New Philanthropy Capital (NPC) and the Society of Trust and Estate Practitioners (STEP). In addition, traditional

charities, especially the big brands, are re-labelling their fundraising teams as 'Philanthropy' teams which appears to confuse the market place. So, in amongst all this Community Foundations need to stand out in this busy market place

and take up a gap in the market, otherwise we will lose out on delivering one of our key three roles which is philanthropy facilitation, alongside investing in communities and community leadership.



What does success look like in this area?

"Being recognised as a community focused organisation, where genuine philanthropic conscious people know our value." Community Foundation Practitioner Respondent in 2013

The Expert View

"Some causes are more substantial than others, and some charities and some interventions better than others. Also some ways of giving are better than others. So a key task is sorting out which are which and guiding donors to them. Perhaps Community Foundations (CFs) can do that: certainly their relationships make them well-placed to try."

A key difficulty is that many organisations 'vetted' and supported by CFs are tiny: too tiny to produce reliable evidence themselves on their effect; and often doing interventions which haven't been reliably assessed by anybody else.. So the challenge for CFs is to figure out a way of assessing organisations which is, on one hand, robust, but on the other, light enough that it doesn't unduly interfere with charities' work. There are also many issues which affect donor effectiveness other than which organisations they fund. Again, CFs are well-placed to advise on that, though there is a lot which currently nobody knows."

Caroline Fiennes, Director, Giving Evidence 'Advice on giving, based on evidence' and Independent Philanthropy Advisor

Recommendation:

- Community Foundations need to regularly review their philanthropy advising offer to understand continually their Unique Selling Points (USPs) in the busy field of philanthropy advising to establish their offer to philanthropists and attract them, especially those interested in working with communities. This includes our balanced offer of good donor care, extensive community knowledge and quality funding administration and monitoring;
- Community Foundation philanthropy advising needs to be offered at a high standard within our means, especially to compete with private sector offers that have more resources available, though having the edge on competitors due to at least funding monitoring, if not social impact reporting we can offer philanthropists.

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Section 2. Taking on the Big Guys: The Clear Competitors

In discussions with senior Community Foundation practitioners in 2013 and 2014 the clear competitors to Community Foundations in the philanthropy advising field were (in order of level of concern) Local Solicitors, Private Banks and then other Professional Advisors. The levels of concern in 2013 of these competitors threatening our work were moderate to high; 11% of practitioners were 'Very Concerned', 50% were 'Concerned' and 28% were a 'Little Concerned'. However, general levels of concern 18 months later appeared to reduced to 'A little Concerned' rather than 'Very Concerned' in 2013, assuming experience and initiatives such as the Philanthropy Fellowship have contributed to greater confidence in the marketplace.



Our competitive market place of philanthropy advising is one in which there is a large number of suppliers as mentioned previously, though not strongly differentiated for philanthropists which perhaps is the case due to the new, informal and unaccredited nature of the field currently in the UK. We are also competing with organisations in the private sector with resources and profile far beyond our means. Perhaps these are the reasons why we feel so concerned and not so confident in competing as survey respondents evidenced.

However, providing tax, investment and financial advice and going beyond our ethical code consistently over 18 months were seen as areas beyond our remit in Community Foundation advising which our perceived competitors can of course provide.

What does success look like in this area?

"CFs need to seek/gain the pole position in the market as 'the' place to go for the latest thinking on social impact and social investment." Community Foundation Practitioner Respondent in 2013

Recommendation:

- A regular competitor analysis needs to be undertaken to understand the ever-changing market place of philanthropy advising, especially any new competitor offers similar to a Community Foundation's, in order to be relevant to community philanthropists.

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Section 3. Being Best Placed: Upping Our Game

We do have a strong and different offer to our competitors as we are best placed to offer philanthropy advice in comparison to all those mentioned because we have the dual role of operating in communities, gaining vital knowledge and links via the social sector, and working with philanthropists and the private sector, understanding their motivations and aims with the overarching requirement of UKCF Quality Accreditation standards. No other player in this market place can claim that experience, skill, networks, knowledge and standards. Therefore, finessing and enhancing our philanthropy advisory offer is essential. The Community Foundation Philanthropy Fellowship UK pilot from 2012 -2014 and its legacy, the Philanthropy Advising Framework, developed with CASS Business School in 2014, are clear steps towards this goal of carving out our place in the market and taking on the competition.

The Expert View

"We have been really inspired by the way in which staff and managers across Community Foundations have taken to defining the competencies required for effective philanthropy advice. We knew we would be breaking new ground when we tendered for this exciting work, but hadn't quite appreciated how proud professionals within your network are of the knowledge and skills required to work with donors to really make a difference in your local communities.

Capturing this has been a huge challenge for us as it is so complex, but we are confident that the impact of the work will really make a difference to the quality of life in your local communities: through you, change will happen. Everyone we've met has grasped the task with rigour and vigour. We hope you see the work as a great opportunity to be even more impactful in the work you do - for your local community of course, but also for yourselves and your Community Foundation team."

Fiona Ash, Dr Peter Grant, Caroline Copeman, Cass Centre for Charity Effectiveness, November 2014

What does success look like in this area?

Success is a ..."professional approach, ... donors seeing you as a reputable partner, not just a charity."
Community Foundation Practitioner Respondent in 2013

Recommendation:

- Using the learning from the Philanthropy Fellowship UK and the development of the Philanthropy Advising Framework, Community Foundation philanthropy advising as a product offered at a local, regional and UK level needs to be developed for marketing in 2015/16, taking into account the full market place and our immediate competitors;
- Our marketing plan needs to include agreeing and articulating our USPs and building our credibility with our track record to date, such as advising high profile or high value philanthropists, in order to build our credibility and increase our work in advising and working with philanthropists.

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Section 4. We are not perfect: Our Community Foundation Challenges

In our work in this developing field of philanthropy advising Community Foundations have a strong track record in offering advice, especially those of ten years of operating, but we still face challenges in this field. In 2013 practitioners shared that the challenges to Community Foundations delivering philanthropy advice were:

- No formal training
- No bench-marking
- No formal accreditation
- Increasingly competitive market
- Inconsistency of advice/service across some Community Foundations
- Odd moments of lack of CF confidence

In 2014 those top challenges for Community Foundation practitioners changed to:

- Inconsistency of service across Community Foundations
- Increasingly competitive market
- No formal (in-house) training

With other recognised general challenges being:

- No benchmarking on customer service or charging
- No formal accreditation in advising

These challenges continue to be very similar over an 18 month period which the Philanthropy Advising Framework will aim to resolve with UKCF's support.

The Expert View

“Our research shows that donors - especially newer/younger donors, are increasingly willing to seek professional philanthropy advice. The growth in the size of funds managed by CFs, and in the number of individual donors, underlines this point. This makes it all the more crucial that advisers are on top of the latest research and have had the opportunity to gain the skills and knowledge they need before working with a donor who has money to distribute. There are many ways to upskill the philanthropy advisory profession - including university-accredited courses, sector-provided training, mentoring and peer learning as well as the individual’ ongoing informal learning, such as reading the latest news and studies.

Community foundation staff will likely want to draw on these options at different stages in the advisor’s career, as well as signposting what is available so that individual staff can be pro-active in ensuring they are taking advantage of the latest knowledge. Having a CF book group to discuss the latest ‘best seller’ on philanthropy is an example of a no-cost way of keeping up-to-date.”

*Dr Beth Breeze, Director, Centre for Philanthropy
School of Social Policy, Sociology and Social Research, University of Kent*

What does success look like in this area?

*“To complete the goal, **CF staff need to gain more experience** with the skills of working with ...donors, coaching, and introducing donors to developing their own giving strategy.” Practitioner respondent in 2013*

Recommendations:

- To ensure development and training opportunities for Community Foundations in the UK to improve practitioner confidence in advising and set standards in advice, working from the Framework;
- To aim for the Framework to be supported by peer learning, exchanges across Community Foundations, UKCF facilitated professional development and the potential of a formal training programme, building on the Community Foundations Futures course from the Institute for Philanthropy during 2007 – 2010;
- To build in best practice in Philanthropy Advising in Quality Accreditation 5 in 2019, following pilots of the Framework in 2015 to 2016 in order to achieve consistency of practice and service across the UK movement of Community Foundations.

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Section 5. Formalising Philanthropy Advising: It is Ground-Breaking

The opportunity was welcomed via the Philanthropy Fellowship was for nine Community Foundations in 2012 to enhance their philanthropy advising offer and have more time with donors. This has led to 200 community philanthropists being more engaged in Community Foundation work across the UK and to those Community Foundations developing their skills in philanthropy advising, calling for a formalised framework in advising. Those Community Foundations have self-funded the emerging work with CASS Business School to capture existing best practice in order to develop our philanthropy advising offer, the skills of our employees and our offer to community philanthropists.



The Philanthropy Advising Framework

CASS Business School believe that Community Foundations in the UK are the biggest driver of philanthropy in the UK, and their consultancy research will enable Community Foundations to establish a formal philanthropy advising approach that does not exist as yet in the UK; they consider this to be simply “ground-breaking”.

The Competency and Assessment Framework has been developed for employees who provide philanthropy advice working in all local Community Foundations. The brief was to have a network-wide approach to developing the competency of staff within Community Foundations, which took account of:

- The full breadth of staff roles: the needs of specialist staff giving philanthropy advice, but not limited to these specific job roles, providing a menu of competence which could be undertaken by any staff member across a community foundation;
- Differing levels of organisational development and resources;
- The geographical spread of Community Foundations;
- The requirement for the active involvement of philanthropy advice practitioners and their managers in local Community Foundations.

The framework aims to:

- Provide for three levels of competency (Emerging, Established, Expert) for giving philanthropy advice, showing linkages to dependent/supporting roles;
- Outline evidence of competency and an assessment approach for each level of competency, supporting those involved in providing philanthropy advice and foundations (boards and leadership teams) to set expectations and manage performance and development accordingly, through a structured process;
- Offer a learning and development menu providing a basis for development planning with a range of potential opportunities.

Recommendation

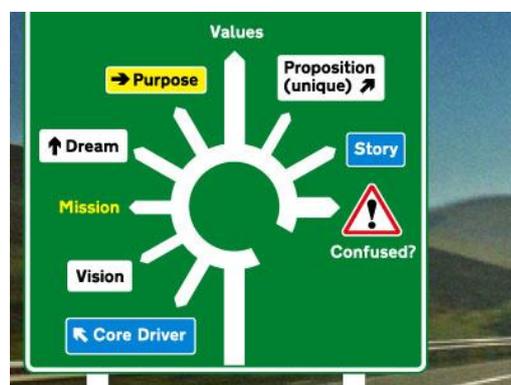
- Compliance with the competency framework should not be mandatory currently as part of the quality accreditation process for membership for Community Foundations of UK Community Foundations. Instead, Community Foundations should be encouraged to see adoption of the framework to be the start of a change journey for those who may be interested in becoming specialists in the area of philanthropy advice.

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Section 6. So, What Next?

Delivering Philanthropy Advice Collectively and Collaboratively

Having identified our opportunities and challenges, having tested the Philanthropy Fellowship during 2012 to 2014 and now developed the Philanthropy Advising Framework with CASS Business School we are in a strong position as a movement in the UK to move forward in formalising our advising offer.



Key Elements of our Philanthropy Advising Offer

Measuring results, demonstrating impact and communicating effectively continue to be seen as success factors which must be included in the planning for the use and development of the Framework. Skills and abilities required for philanthropy advising have been identified as follows:

Priority Skills & Abilities

- Ability to listen
- Ability to meet the donor where they are and take them on a journey

Supporting Priority Skills & Abilities

- Passion & Enthusiasm
- Knowledge of Community Groups
- Being non-judgemental

Investment knowledge was rated to be of low importance. These priority elements have been included in the Philanthropy Advising Framework. The following four tools were rated to be of equal importance by survey respondents: Monitoring Social Impact, Project Visits, Strategic Planning with Philanthropists and Time Spent with them. These priority elements have been included in the Philanthropy Advising Framework.

Recommendation: In relation to advising there is development work required to enhance strategic planning, monitoring and project visits and new work required to create social impact tools.

6.1 Using the Philanthropy Advising Framework

Senior practitioners who are involved in philanthropy advice provided responses in the 2014 online survey (November 2014) which will help to guide the delivery of the Framework and our overall advising offer as Community Foundations in the UK. Outlined below are elements to consider in the piloting, delivery and evaluation of the use of the Framework.

Main Priorities for use:

- Professional development of staff
- Donor care processes and procedures
- Customer service development

Other Priorities for use:

- Develop a Community Foundation's Board and Staff Team
- To deliver funding more effectively to communities
- Social impact reporting using Theories of Change
- Recruitment and induction
- Staff Performance Reviews

Recommendation: In the 2015/16 pilot of the Framework it is recommended for participating Community Foundations to pilot against their Recruitment & Induction process, Appraisal and Professional Development process or Strategic Delivery & Review process.

Learning and Development Opportunities with the Framework

Top requests for Learning and Development opportunities are:

- Sessions at UKCF Conferences & Symposiums
- Case studies and research on an online hub
- Action Learning Sets for peer learning

Other general requests for Learning and Development opportunities are:

- Mentoring from more experienced staff from other Community Foundations
- Buddying with staff in other Community Foundations at the next level up
- Training courses at Basic, Intermediate and Advanced levels
- Induction of new staff
- Exchanges with Community Foundations internationally working in this area

Recommendation: Many of these Learning and Development opportunities can be created, delivered and evaluated within the UK movement of Community Foundations as self-facilitated by participants or by UKCF. A training programme to support the Framework needs to be developed to support this work as it develops and practitioners become more sophisticated in their work, though certificated training is not currently seen as top priority.

To note, the following Learning & Development rated low and so not so relevant:

- Buddying with staff in other Community Foundations at the same level
- Guidance on work based learning for a Community Foundation to facilitate in-house

Use of the Framework Externally

Priority planned use:

- Enhance the donor benefits package
- To raise the Community Foundation's profile

- To be more competitive in the marketplace of philanthropy advising
- To attract new donors and funders
- To offer consultancy

The opportunity to charge more fees for work was not rated as a priority for external use.

What Community Foundations are willing to offer in order to deliver the Framework

Primary offer:

- To work collectively with Community Foundations to develop and review the Framework each year
- To work with other Community Foundations to market the philanthropy advising offer to donors
- To be a member of the UK Steering Group to lead the Framework's development

Secondary offers:

- To contribute to delivering training in a region or nation primarily and sometimes at a UK level
- Members of staff from Community Foundations to buddy or mentor staff in other Community Foundations

Only a small number of people offered to train as Action Learning Set (ALS) facilitators in order to run Sets. This needs to be explored as these Sets as a professional development opportunity were rated highly as a peer learning opportunity.

Recommendation: There is a need to decide as to whether Community Foundations and/or UKCF pay for training to have a selection of ALS facilitators within the movement to facilitate sessions in regions or nations or have a preferred list of external ALS facilitators who are paid for sessions. In terms of support requested from UKCF a list of preferred ALS facilitators was requested as a priority by respondents – see below.

Support Requested from UKCF and/or CASS Business School

Primary Requests:

- Toolkit to guide delivery
- Case studies on effective delivery
- Approved ALS facilitators to facilitate peer learning sessions
- Face to face sessions with other Community Foundation practitioners

Secondary Requests:

- Accredited learning and training from CASS or other similar bodies

Approved mentors, conference call briefing sessions, an accredited qualification and webinars were low priority in terms of requests. The credibility of CASS having created the Framework is thought to support with profile raising, though seems not important in terms of a qualification.

Recommendations:

- There is a need to explore a mentor and buddying scheme that supports professional development led by the practitioner without having an approved list.
- There is a facilitating role required from UKCF to support the regular review and development of the Framework.

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Section 7. So, Yes, What is Next? A Summary

We operate as Community Foundations under our governing documents to provide public benefit for our communities, operating in collaboration with community philanthropists to facilitate effective giving for them for communities. Due to this approach we wish to offer the best quality and highest standards in philanthropy advice in the UK as we are best placed with our connecting role between philanthropists and communities.

There is a willingness and commitment in at least a quarter of our UK movement already to 'up our game' in our philanthropy advising offer to philanthropists which provides a robust starting point, supported by UKCF. Our aim is to pilot the Framework in 2015/16, working towards Quality Accreditation Five in 2019 as a potential point when the majority of Community Foundations offer philanthropy advice against the Framework which will have been finessed and enhanced by then; perhaps a target should be 50% of the UK network to adopt the Framework by 2017/18. The Framework should aim to complement other collective and collaborative work in the movement, such as Vital Signs.

Our progress needs to be assessed on an annual basis, informed by the live experiences of staff in Community Foundations who offer philanthropy advice and the overall benefits and learning gained by Community Foundations involved to ensure continued development of the Framework and Community Foundation use of it.

As Community Foundations we are passionate about making a difference and achieving our social mission, distributing donated funds wisely and effectively with and for donors. We are unique and exceptional in the work that we do to ensure our communities are thriving. As mentioned, this Business of Philanthropy Advising recommendations report has aimed to provide some answers as we move develop in the field of philanthropy advice and take ground-breaking steps to formalising our work in the UK.

Thanks for reading.

Summary of Recommendations

Looking Externally to Reach High Standards & Be Competitive

1. Community Foundations need to regularly review their philanthropy advising offer to understand continually their USP in the busy field of philanthropy advising to establish their offer to philanthropists and attract them, especially those interested in working with communities. This includes our balanced offer of good donor care, extensive community knowledge and quality funding administration and monitoring;
2. Community Foundation philanthropy advising needs to be offered at a high standard within our means, especially to compete with private sector offers that have more resources available, though having the edge on competitors due to at least funding monitoring, if not social impact reporting we can offer philanthropists;
3. A regular competitor analysis needs to be undertaken to understand the ever-changing market place of philanthropy advising, especially any new competitor offers similar to a Community Foundation's, in order to be relevant to community philanthropists;
4. Using the learning from the Philanthropy Fellowship UK and the development of the Framework, Community Foundation philanthropy advising as a product offered at a local, regional and UK level needs to be developed for marketing in 2015/16, taking into account the full market place and our immediate competitors;
5. Our marketing plan needs to include agreeing and articulating our Unique Selling Points (USPs) and building our credibility with our track record to date, such as advising high profile or high value philanthropists, in order to build our credibility and increase our work in advising and working with philanthropists;

Looking Internally to Increase Competence, Capability and Confidence in Community Foundations

6. Ensure development and training opportunities for Community Foundations in the UK to improve practitioner confidence in advising and set standards in advice, working from the Framework, supported by UKCF;
7. Aim for the Framework to be supported by peer learning, exchanges across Community Foundations, UKCF facilitated professional development and the potential of a formal training programme, building on the Community Foundations Futures course from the Institute for Philanthropy during 2007 – 2010;
8. Build in best practice in Philanthropy Advising in Quality Accreditation 5 in 2019, following pilots of the Framework in 2015 to 2016 in order to achieve consistency of practice and service across the UK movement;
9. Compliance with the competency framework should not be mandatory currently as part of the quality accreditation process for membership for Community Foundations of UK Community Foundations. Instead, Community Foundations should be encouraged to see adoption of the Framework to be the start of a change journey for those who may be interested in becoming specialists in the area of philanthropy advice;

Piloting, Implementing & Reviewing the Philanthropy Advising Framework

10. In relation to advising there is development work required to enhance strategic planning, monitoring and project visits and new work required to create social impact tools;
11. In the 2015/16 pilot of the Framework it is recommended for use against Community Foundation Recruitment & Induction process, Appraisal and Professional Development process or Strategic Delivery & Review process;
12. Many Learning and Development opportunities can be created, delivered and evaluated within the UK movement of Community Foundations as self-facilitated by participants or by UKCF. A training programme to support the Framework needs to be developed to support this work as it develops and practitioners become more sophisticated in their work, though certificated training is not currently seen as top priority;
13. There is a need to decide as to whether Community Foundations and/or UKCF pay for training to have a selection of ALS facilitators within the movement to facilitate sessions in regions or nations or have a preferred list of external ALS facilitators who are paid for sessions. In terms of support requested from UKCF a list of preferred ALS facilitators was requested as a priority by respondents;
14. There is a need to explore a mentor and buddying scheme that supports professional development led by the practitioner without having an approved list.

FURTHER INFORMATION

The Business of Philanthropy Advising: How far should we go? Recommendations for Community Foundations in the UK February 2015

Methodology

The approach to compiling this report has been as follows:

- Results and analysis from an online survey in summer 2013 with 20 senior Community Foundation practitioners from the UK responding out of 48 Community Foundations in the UK (42% response rate by Community Foundation) on their thoughts on their levels of competency in philanthropy advice, their current competitors in the field, essential tools for advising and success factors for the future for Community Foundations in this field;
- Testing of the summer 2013 survey results and overall concept with around 70 senior Canadian practitioners at a tailored workshop delivered by me at the Community Foundations of Canada Conference in June 2013;
- Testing of the summer 2013 survey results and overall concept in a 'Ted Style' talk at the UK Community Foundation Conference in September in Bristol 2013 with over 250 Community Foundation practitioners in the UK, gaining informal feed-back afterwards;
- Sharing of the summer 2013 survey results via the UK Steering Group for Philanthropy Advising in 2013/14 to inform thinking for advising tools for Community Foundations and research work with CASS Business School to create a Philanthropy Advising Framework;
- Liaison with CASS Business School from September to December 2014, sharing summer 2013 survey results, report content and overall concept to inform their consultancy research on developing the Philanthropy Advising Framework by December 2014 with the above Steering Group;
- Results and analysis from an online survey in autumn 2014 with nine senior Community Foundation practitioners from the UK responding out of 48 Community Foundations in the UK (19% response rate by Community Foundation) on their thoughts on the progress to date in the field of philanthropy advising for Community Foundations, current competitors and how they would use the forthcoming Framework;
- Sharing autumn 2014 survey results, testing overall concept and announcing CASS Business School framework in a 'Ted Style' talk at the UK Community Foundations Symposium in November 2014 in London to around 100 Community Foundation senior practitioners, signing-up 12 Community Foundations (25% of the UK Network) to the Framework pilot in 2015/16.

The findings of this report will be shared at the Community Foundations of Canada Conference in May 2015 and UKCF Conference in September 2015 to disseminate findings with Community Foundation practitioners.

About Clore Social Leadership Programme

This research report is published as part of my Clore Social Fellowship. As part of the Clore Social Leadership Programme, each Fellow is required to undertake a piece of practice-based research. The purpose of the research is to help develop Fellows' skills as critical users of research, and to help develop the evidence base for the sector as a whole. The research focus, methodology and output are all chosen by the Fellow.

More information can be found at: www.cloresocialleadership.org.uk

FURTHER INFORMATION

**The Business of Philanthropy Advising: How far should we go?
Recommendations for Community Foundations in the UK
February 2015**

Author's Biography

Cathy Elliott is the Chief Executive of Community Foundations for Lancashire & Merseyside in the UK and a Trustee of UK Community Foundations. Within her Community Foundation work in the UK she leads two key initiatives as Chair of the Philanthropy Advising Steering Group since 2013 which has led to the creation of the Philanthropy Advising Framework with CASS Business School and as Founding Chair from 2010 to 2013 and now Co-Chair of the UK Vital Signs Steering Group since 2014/15.

Cathy was trained as a philanthropy advisor in 2007 by Dr Sal La Spada and Fennella Rouse, then of the Institute of Philanthropy and formerly of the Rockefeller Foundation. She advises philanthropists on their giving, such as businessman Sir Terry Leahy and former footballer and Sky Sports presenter, Jamie Carragher. She also advises regional and national companies in the UK on their corporate citizenship, including Shop Direct, including Littlewoods and Very.com, and Santander. Cathy is Chair of the Philanthropy Fellowship North West which is a philanthropy education programme for nearly 50 philanthropists in the North West of England.

Cathy is a 2013 UK Clore Social Leadership Fellow and a 2009 CUNY Senior International Fellow of the Philanthropy & Civil Society Faculty, revisiting CUNY as a Guest Speaker for Senior Fellows in 2015. She is also degree graduate of University of Manchester, specialising in Film and Politics. Cathy has won a number of local and regional senior leadership awards in the North West of England, including with the Institute of Directors. She has won a Director of Social Change award and was short-listed for a Sheila McKechnie Foundation Campaigner of the Year award for her work on Merseyside Young Transformers, a youth diversionary programme in 2008.

Cathy has worked within the UK Community Foundation movement since 2007, and before then worked for eight years in fundraising, marketing and campaigning for the disability movement, the arts and a hospice. She is a Trustee of the youth-led, Manchester-based charity, RECLAIM and a volunteer with a number of grassroots charities in the North West.

For queries about this report Cathy can be contacted at cathy.elliott@cflm.email