

Stanford PACS Education for PHILANTHROPY PROFESSIONALS

As a philanthropic professional in a leading role within a family foundation or family office, you are in a unique position to guide your principal and execute on their vision for changing the world. In order to be successful, you must understand the principles and practices of effective philanthropy; navigate the principal's ideas, budget, and priorities; be familiar with trends and best-practices in the field; and continue your own career growth through professional development and networking opportunities.

The **Effective Philanthropy Learning Initiative (EPLI)** at the Stanford Center on Philanthropy and Civil Society (PACS) has developed a virtual, executive-style learning program delivered through six half-day sessions over three weeks. Cohort sizes will be limited to ensure in-depth, hands-on learning and opportunities to network with peers. The program will be taught by experienced EPLI faculty and staff and will include discussions with several guest speakers and Stanford professors on a variety of specialized topics.

This is offered in partnership with the **National Center for Family Philanthropy (NCFP)**. Given their expertise, NCFP leadership will teach a unit on Family Governance. In addition, program alumni will be offered steeply discounted rates to join NCFP so they can continue their philanthropy education, networking with similarly situated professionals, and much more.

WHAT THE COURSE WILL COVER

The program will include a review of the foundational principles and practices of effective philanthropy, as well as discussions of methods for applying them to your own practice. In particular, it will address:

- How to help align principal's values and focus areas
- Understanding social problems, their causes, and strategies for solutions
- How nonprofits solve problems and how to develop your own theory of change
- How to monitor and evaluate nonprofit progress
- Best practices for structuring gifts to organizations
- How to develop relationships with grantees



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FORMAT

Virtual | Part-time |

6 half-day sessions over three weeks

Capacity capped at 24 participants

DATES/TIMES

October Program 2021:

Day 1 & 2 Oct 14-15, 9:00am-2:00pm

Day 3 & 4 Oct 21-22, 9:00am-2:00pm

Day 5 & 6 Oct 28-29, 9:00am-2:00pm

(Pacific Time/West Coast USA)

The program will also cover a number of additional topics such as:

- A historical look at philanthropy from a traditional lens and through a look at African American philanthropy in America
- Contemporary trends in philanthropy
- Principles, policies, and practices of family foundation governance (delivered in partnership with the National Center for Family Philanthropy)
- Socially-motivated investing
- The relationship between philanthropy and democracy
- Participatory philanthropy
- Approaches to social justice work in the nonprofit sector
- How to engage in advocacy work from a grassroots perspective

WHO SHOULD ATTEND

- Senior executives at small-to-mid-sized family foundations or individuals managing charitable giving within a family office
- Philanthropy advisors or consultants who have taken on central roles supporting one or more individual philanthropist
- Family members playing a substantial role in directing their family's philanthropy through a charitable vehicle such as a foundation or donor advised fund

ABOUT THIS COURSE



This program is designed by the Effective Philanthropy Learning Initiative (EPLI) at the Stanford Center on Philanthropy and Civil Society (PACS). We are an interdisciplinary team working at the intersection of strategic philanthropy, the behavioral sciences, and design thinking to accelerate learning for donors and relevant support staff, advisors, and other intermediaries in the donor-support ecosystem—so they can make more informed and deliberate giving decisions, thereby increasing their impact.

APPLICATION

REQUIREMENTS

Prospective participants will be asked to complete a form application, respond to open-ended questions, and confirm their availability and commitment to the program

DEADLINE

24 September 2021

PROGRAM FEES

\$4500

Includes Tuition and Materials

CERTIFICATE AWARDED

Certificate of Completion

FOR MORE INFORMATION

Visit:

pacscenter.stanford.edu/epli

Questions? Contact:

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pacscenter.stanford.edu/epli

Education for Philanthropy Professionals – October 2021

Note: program information subject to change

SCHEDULE SUMMARY

Week 1	Week 2	Week 3
Day 1: Thursday, October 14, 9:00am-2:00pm PDT	Day 3: Thursday, October 21 - 9:00am-2:00pm PDT	Day 5: Thursday October 28 - 9:00am-2:00pm PDT
Welcome Session	History and Modern Implications of African American Philanthropy	Philanthropy in the Service of Democracy
Introduction to Effective Philanthropy	Due Diligence and Structuring Gifts	Risk in Philanthropy
Break	Break	Break
Find your Focus	Philanthropic Advocacy and Working with others	Cohort Councils: Participant led presentations and feedback - Part I
Strategies for Social Change I: Problems, Causes, and Approaches to Solutions		
Day 2: Friday, October 15- 9:00am-2:00pm PDT	Day 4: Friday, October 22 - 9:00am-2:00pm PDT	Day 6: Friday, October 29 – 9:00-2:00pm PDT
Strategies for Social Change II: Developing a Theory of Change	Foundation Governance: Principles, Policies, Practices, and Decision Making Part I	Cohort Councils: Participant led presentations and feedback - Part II
Monitoring and Evaluation	Foundation Governance: Principles, Policies, Practices, and Decision Making Part II	Participatory Philanthropy
Break	Break	Break
Contemporary and Historical Trends in Philanthropy	Case Study on Social Justice Funding	Socially Motivated Investing
		Program Reflection and Wrap Up
Independent Study - Week 1 Reading assignments	Independent Study - Week 2 Reading assignments	Implementation