

Support ‘Engaged Philanthropy and Impact Investing’

| Course Overview

Philanthropy is the desire to promote the welfare of others, expressed especially by the generous donation of money, time and resources to worthy causes. It is both a personal and collective knowledge journey. As an individual, you want to ensure your philanthropic journey resonates with your passions. As a collective, or family, your skills sets or management will have a profound impact on the time that you invest, the talent you can add, your financial contributions, the confidence you engender, and the network that you engage.

Engaged philanthropy matters because it creates opportunities. Philanthropy itself supports initiatives that may be unpopular or too controversial to garner widespread public or government support. As such, philanthropy is a vital to a democratic society. Philanthropists answer to neither government nor the public, so they can freely choose which individuals and projects receive their support.

Family Enterprise Foundation and Wider Sense are developing Engaged Philanthropy and Impact Investing for Entrepreneurial Families, a five-unit online course, for business families dedicated to using their knowledge and resources to make a meaningful impact on their communities, their countries and internationally.

Upon introducing key concepts, the course will focus first on establishing the values, vision and mission of the family’s philanthropic purpose, and techniques to fully engage next-generation family members. Course participants will then take a deeper dive, exploring specific resources needed, and how best to deploy them, for **maximum philanthropic impact**. The course will analyze operations, investments, board structure and roles needed to clarify your philanthropic vision and mission. We will investigate **Strategic Philanthropy** planning through the management of grants and investments. Finally, the course will probe key elements of **Impact Investing** through the triple lens of evaluation, learning and communication.

Core Areas – Philanthropy, Impact, Giving Back, Family Purpose

| Course Structure

- **Introduction** – What is Philanthropy and what impact has it had?
- **Unit 1** – Philanthropy Overall: Values, Vision, Mission and the Next Generation
- **Unit 2** – Your Philanthropic Resources
- **Unit 3** – Envisioning your Family’s Active Philanthropy in Practice
- **Unit 4** – Getting Ready to Give
- **Unit 5** – Philanthropy Best Practices Impact Investing
- **Conclusion** – What’s Next? Applying Course Concepts

| Impact of Funding

- Complete the course up to Family Enterprise Foundation's world-class standards
- Create Blended Learning collateral (Facilitation Guide)
- Translate course into French

| Course Experts

- **Sharna Goldseker** – Founder and Vice-President, 21/64 (USA)
- **Sharilyn Hale** – President, Watermark Philanthropic Counsel (Canada)
- **Michael Alberg-Seberich** – Managing Partner, Wider Sense (Germany)
- **Michael Colson** – Program Director, Edmond J. Safra Foundation (Switzerland)
- **Pieter Stemerding** – Philanthropy Advisor (Netherlands)

Expected Development Cost to Complete the Course: \$100,000

| Donor Recognition and Naming Opportunities

Family Enterprise Foundation welcomes the opportunity to extend **donor recognition through naming rights** of its assets to those individuals, corporations, foundations or organizations whose generous support make the establishment or enhancements of FEF programs aimed at supporting family enterprises possible.

This unique course is in development. Help us get over the finish line. Please **contact us** to learn more about this vital area of support and how you can make an impact.