When you first meet a philanthropist, what are the things you want to know right away?

- Listening and understanding are key at the start of the relationship. I want to know what motivates and what matters to them. Every philanthropist has a unique journey - for some people there is a clear issue they want to address and for others they want to make a difference but are not sure how. I have also learned the importance of finding out about more practical issues such as how much time they have to give to their philanthropy as this will determine the pace and ambition of the work.

What are the various steps in an advisory process before advising the philanthropist which projects to support?

- A book we simply the process to four common steps:
  - clarifying the donor’s values, motivations and aspirations
  - helping them to choose a focus
  - designing a strategy, or roadmap for their giving
  - supporting its implementation

Alongside this is the learning journey where the advisor introduces the donor to different philanthropic approaches, the world of non-profits, and connects them with experts, communities, and peers.

Which other advisors does the philanthropist usually work with and how does the collaboration work?

- The philanthropist often has an ecosystem of support around them including wealth managers, tax advisors or a family office team. Sometimes everything is under one roof including philanthropic advice. More often, there is a need for the client or a lead advisor to bring in specialist support. It is hard for any one individual to be an expert in all areas so working together is key. For example, I am currently advising a client on which organisations to support and another advisor is helping them with some tricky family governance issues.

How big is your community in Europe? Are you a member of a network? Do you collaborate together?

- We don’t know how many philanthropists there are in Europe (or anywhere for that matter) but I do know it is growing. There is still work to do to convince other private client advisors of the value of philanthropy advice but the philanthropists themselves want this help and the market is responding. I am a member of two US networks and a global one and there is a huge appetite for collaboration – no one advisor can possibly know about every cause and every opportunity. We share resources and encourage our clients to do the same.

Could you tell us about any particularly successful episodes in your collaboration with philanthropists?

- I have worked with one family for many years. As their knowledge and confidence has grown they have given more and in ways that centre what non-profits need. The third generation are now actively involved in the shaping of the family foundation including lively debates about whether or not they should spend down or continue. The best part of the job is when I reach out to an organisation to explain that I have a client interested in supporting their work. Quite rightly, they don’t always believe me, and so it is great when they have checked I am legitimate and then after some conversations, they end up receiving a donation. Having worked in grant-making for so many years and knowing how much work goes into funding bids, it is a real treat to be able to support organisations without them having to spend much time on their asks.

Do you remember any particularly interesting happenings?

- Philanthropists are often criticised. The stereotype is that they are driven by ego and status and their giving is about getting others to do what they want in areas they don’t understand. My experience is nothing like this. The people I work with are deeply thoughtful and caring and keen to learn and contribute. They are also very private and so I am afraid I can’t share much in the way of detail.

What future do you see for this profession?

- I want the profile of the profession to rise and for philanthropy advice to become a mainstream offering for people with a range of budgets. I want to see more training and qualifications. I want to see more people become philanthropy advisors, from a diverse range of backgrounds including from non-profits and in global majority countries. I am sure we will see more advisors focusing on different types of donor, causes and approaches, for example, people advising younger philanthropists or emerging wealth, or specialising in collaborations, systemic change or culturally appropriate practices. The social and environmental needs are great and the complexity is overwhelming. Whilst philanthropy cannot solve all the world’s issues, philanthropy advisors do unlock private funds for public good. Just imagine what would happen if all advisors spoke to their clients about philanthropy and encouraged them to seek specialist support from a philanthropy advisor? Would I love to see giving as the norm for everyone with wealth and philanthropy advisors will be right there to support philanthropists to give more and in better ways.