

PROCEED BOLDLY
INSPIRE MERCY
MAKE HIS DIFFERENCE

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TODAY, MORE THAN EVER BEFORE, THOSE COMMITTED TO ADVANCING THE CATHOLIC FAITH AROUND THE GLOBE ARE WITNESSING A TRANSFORMATION IN CARING FOR THE COMMON GOOD THROUGH PHILANTHROPY.

CATHOLIC INDIVIDUALS, FAMILIES, AND FOUNDATION AND CORPORATE GRANT MAKERS ARE INCREASINGLY SEEKING MORE THAN JUST “MEANING IN THEIR MONEY...” THEY UNIQUELY DESIRE NOVEL, CREATIVE WAYS TO ANIMATE CHARITABLE GIVING FOR GREATER IMPACT BY DEEPENING THE CONNECTION OF THEIR GENEROSITY TO THEIR CATHOLIC FAITH VALUES AND EXPERIENCES; THEREBY GIVING GREATER GLORY AND PRAISE TO GOD.

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WHY CATHOLIC, FAITH-BASED GIVING?

“Catholic donors discover a higher joy, fulfillment and impact in giving when they connect their love of others with their love of God in action.”

WHY NOW?

Inspired as a consequence of a personal, life-long faith journey and passion for philanthropy, Pope Francis’s start of the rare, Extraordinary Jubilee Year of Mercy in our beautiful Catholic faith, has accelerated VENTURE3Philanthropy’s focus on serving Catholic donors and foundation grant makers.

Serving faith-based givers has led VENTURE3Philanthropy, now in it’s fifth year, to provide new ways to make philanthropy more central and evident to our Church’s mission to be witnesses of mercy – less judgmental; bringing more dignity, offering compassion and understanding; generously shared in a world longing for love.

Meet VENTURE3Philanthropy LLC

Seek Justice

Love Mercy

Walk Humbly with Our God

Micah 6:8

INVITATION TO PARTICIPATE IN CHRIST’S MERCY THROUGH PHILANTHROPY

”From the heart of the Holy Trinity, from the depths of the mystery of God’s love, the great river of mercy wells up and overflows unceasingly. It is a spring that will never run dry, no matter how many people draw from it. Every time someone is in need, he or she can approach it because the mercy of God never ends.” – Pope Francis, 2015

There exists today around the world a tremendous need and opportunity to give and receive greater support and mercy to one another. Animating the Corporal and Spiritual Works of Mercy in new and impactful ways is a philanthropic path worth exploring. The challenges of life lift up opportunities to help advance justice for others, meet head-on any indifference, remain open to the actions of the Holy Spirit, cooperate with others and help make life better for those in need.



Corporal Works of Mercy

Concern for the material needs of others

Feed the hungry.
Give drink to the thirsty.
Clothe the naked.
Shelter the homeless.
Visit the sick.
Visit the imprisoned.
Bury the dead.

Spiritual Works of Mercy

Concern for the spiritual needs of others

Instruct the ignorant.
Counsel the doubtful.
Admonish sinners.
Bear wrongs patiently.
Forgive offenses willingly.
Comfort the afflicted.
Pray for the living and the dead.

THE VENTURE3PHILANTHROPY ADVANTAGE

VALUE-ADDED DISTINCTION

Deep Philanthropic Expertise

Development professional, foundation grant maker, donor services leader, trustee, donor

Cross-sector Leadership Experience

In public, private, charitable, and social enterprise sectors

Independent Perspective Delivering Customized, Catholic Giving Experiences

Leading edge knowledge that shapes prayerful and purposeful impact for the common good

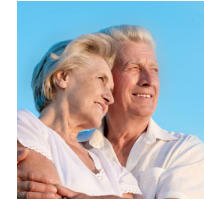
WHAT DRIVES OUR SERVICE?

Catholic Values & Guiding Principles

- Animate Faith - our philanthropic advising experience reflects the teachings of Christ
- Inspire Hope - we listen compassionately to empower and tailor solutions that honor giving intent and lift the dignity of others
- Advance Charity - we hold ourselves accountable to leverage and deliver results for desired impact

WHOM DO WE SERVE?

CLIENT SERVICE SEGMENTS



*Donors and their
Professional
Advisors*



*Multi-Generational
Families of Means*



*Catholic
Foundations and
Organizations*

SOCIAL THEME EXPERTISE

- Children and Families
- Education
- Healthcare
- Social Justice
- Visual and Performing Arts

GENEROUS DONORS AND COUPLES



Role Options

- Independent, Private Philanthropy Advisor
- Personal Private Foundation Advisor
- Donor-advised Fund Philanthropy Advisor

V3P Impact

- Deepen alignment between giving and the values of the Catholic faith.
- Favorite causes and largest gifts are thoughtfully structured to honor donor intent and animate the faith.
- Create a better understanding of the results from your generosity; a deep joy, new found humility in the experience of Catholic philanthropy.
- Services provided in a partnership, which help animate faith-based values and ensure giving intentions are dignified and achieved.

Key Products, Services, and Experiences

- Lead a Strategic Charitable Planning Conversation - “Why do I give? What am I trying to accomplish? How best do I get started? How can I animate my Catholic faith through my giving? Are there favorite causes or organizations I care most about? How can I purposefully and prayerfully advance my faith experience and become a more effective and impactful giver?”
- Design and document a personalized Philanthropy Strategy - a vision, mission, guiding principles, funding themes and goals, and indicators of impact are captured to help shape and guide future giving.
- Help lift up the most effective charitable organizations as funding options - feature those that best align to donors giving strategy; provide due diligence, make funding recommendations based on best-in-class organizational effectiveness standards and faith-based values.
- Assist in the structuring of a new giving vehicle, a charitable gift or a multi-year grant - partner with the receiving charity and donors to properly structure and determine individual gift or grant purposes; prepare Philanthropic Agreements to permanently document donor intent.
- Design and document Donor Stewardship Experiences - provide regular follow-up to ensure donor’s desired outcomes and impacts are fulfilled - make a difference today and design a charitable legacy for tomorrow.

MULTI-GENERATIONAL (NEXTGEN) AND BLENDED FAMILIES OF MEANS



Role Options

- Independent, Private Philanthropy Advisor
- Personal Private Foundation Advisor
- Donor-advised Fund Philanthropy Advisor
- Family Office Philanthropy Advisor
- Family Philanthropy Retreat Facilitator
- Family Dynamics Coach
- NextGen Philanthropy Educator and Strategist

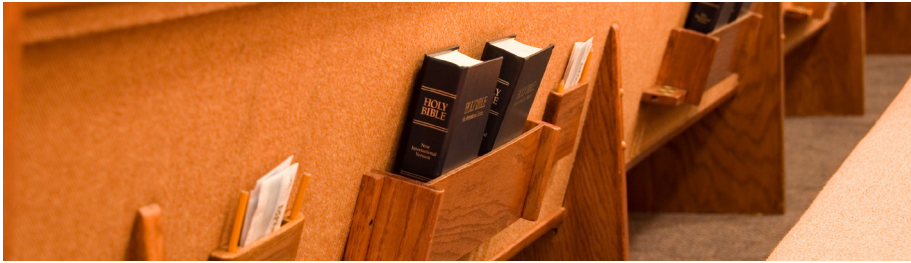
V3P Impact

- Renewed understanding of a larger financial and estate discussion, and family dynamics, in cooperation with professional advisors.
- Families who give together discover new respect for each other, their giving styles. Clarity for future actions allows both separate areas of giving, and collective giving through family unity in the faith.
- Many perspectives on philanthropy are better than one - illuminates distinct impact each person would like to make in caring for others.

Key Products, Services, and Experiences

- Coordinate with Professional Advisor or Catholic Community Foundation the family philanthropy desires as part of comprehensive wealth and estate planning.
- Customize a multi-family and/or blended family engagement and charitable planning strategy, addressing and respecting family dynamics.
- Design and deliver a family philanthropy retreat to lift up individual motivations for giving, and common family philanthropy values.
- Plan and deliver a purposeful and prayerful giving plan and giving vehicle(s) that animate family faith and collectively advance Catholic values.
- Create a Lasting Legacy by building philanthropy into estate plans; provide learning experiences to educate the NextGen to extend the family's philanthropic legacy.

CATHOLIC COMMUNITY FOUNDATIONS



Role Options

- Catholic Community Foundation Advisor
- Philanthropic Advisor to the Bishop and Diocese Office of Advancement
- Donor-advised Fund Philanthropy Advisor
- NextGen Donor/Philanthropy Educator
- Board Governance Leadership Advisor
- CEO/Executive Coach
- Organization Retreat Facilitator

V3P Impact

- Stronger awareness, consideration and preference for engagement by donors in their local or national Catholic Community Foundation.
- Novel programs for engaging and retaining the loyalty of donors who are eager to animate their giving thru their Catholic faith; thereby growing the foundation assets.
- Growth of a community of Catholic faith-based philanthropists who desire greater effectiveness with their generosity, grateful to give greater glory to God with and through others.

Key Products, Services, and Experiences

- Support Diocesan Leadership in the exploration of establishing a new Catholic Foundation.
- Strengthen existing Catholic Community Foundations with establishing or increasing new donor-advised funds and endowments, building up donor-relationships, giving impact and thereby increasing assets.
- Develop or renew an organizational strategy that advances the Catholic-based charitable mission; conduct “effectiveness check-up’s” from the voice of the “customer” to determine current development and fundraising strengths, future improvements, opportunities.
- Design and deliver outward-facing, inspiring donor-focused programs and faith-based giving series that educates and advances the Catholic ministry of expressing faithful and effective charity in action.
- Develop new customer-facing promotional strategies that raise greater awareness of the Foundation to acquire new and retain the loyalty of existing donors, resulting in a higher “likelihood to recommend others” given the strong relationship affiliation with the Foundation.

OFFERINGS HIGHLIGHTED BY CLIENT SEGMENT

NATIONAL AND REGIONAL CATHOLIC ORGANIZATIONS



Role Options

- National Catholic Membership Organization Advisor
- National or Regional Catholic Charitable Organization Advisor
- NextGen Donor/Philanthropy Educator and Strategist
- Board Governance Leadership Advisor
- CEO/Executive Coach for Organizational Effectiveness
- Organization Retreat or Strategic Planning Facilitator

V3P Impact

- Independent, efficient, leading-edge philanthropic expertise, rooted in Catholic values.
- Leadership sounding board for executive brainstorming, testing and piloting new ideas and programs.
- Additional staff support in lean organizations to extend customer engagement.

Key Products, Services, and Experiences

- For Members or Donors who have Catholic-based giving strategies already in place, provide opportunities to listen and review the effectiveness of current giving, help identify new ways to honor individual donor intent, create opportunities for peer-to-peer donor and partner engagement.
- Focused on Organizations who want to utilize an independent perspective to update strategies, conduct “Listening Tour” of Members; offer new perspectives to shape and pilot meaningful new engagement strategies that improve Member loyalty, increase “likelihood to recommend” to grow overall donor base
- Conduct an organizational “Capacity and Capability” (OCC) Review and Analysis that includes a “pulse” of Member engagement, including board and staff feedback; provide “tune up” of current state, prioritize future program improvements, identify new opportunities for growth
- Design and deliver a platform of programs that offer new inspirations for animating Catholic generosity; lift up the Extraordinary Jubilee Year of Mercy through focused philanthropy toward the Corporal and Spiritual Works of Mercy; highlight the Lives of the Saints as examples of generous philanthropists; highlight Christ’s guidance for philanthropy in sacred scripture
- Create a global Catholic Giving Pledge, encouraging a giving commitment by the world’s most wealthy Catholic individuals and families to set aside a large portion of their estate for Catholic philanthropy.

PROFESSIONAL ADVISORS



Role Options

- Partner Philanthropy Advisor
- Partner Private Foundation Advisor
- Donor-advised Fund Philanthropy Advisor
- Family Office Partner and Philanthropy Advisor
- Family Philanthropy Retreat Facilitator
- Family Dynamics Coach
- NextGen Philanthropy Educator and Strategist

V3P Impact

- Knowledgeable and leading-edge charitable planning, in partnership with a professional advisor, generates sound income and tax advantages.
- Successful integration or philanthropy into the overall wealth plan from the start increases the client's potential desired giving impact in a manner that also deepens the client faith experience for those "seeking more meaning in the money."
- Strengthen client relationships by promoting and providing strategies, vehicles, tools and solutions in effective, faith-based philanthropy.

Key Products, Services, and Experiences

- Partner throughout the firm by educating and demonstrating how professional advisors can start the philanthropy planning conversation, particularly when the client is eager to place their faith in action through philanthropy.
- Participate in introductory client conversations with Professional Advisors: explain the role of philanthropy in the overall wealth plan, why give, listen to client preference for giving amount, current charitable giving relationships and causes clients care most about; look for intersections with their faith.
- Design series of client conversations to discover client faith and motivations for giving, intentions for future legacy.
- Host and facilitate a philanthropy retreat to structure a highly engaging way to lift up client motivations why give, personal generosity values, current giving desires and future legacy intentions; share sacred scripture as framework for organizing future charitable action options.
- Document faith-based Giving Plan and support its implementation, including designing donor and gift stewardship experiences to ensure client and nonprofit partners understand the consequences and impact of client generosity.

WHO IS VENTURE3PHILANTHROPY LLC?

We are a leading, national philanthropic advising firm that partners with others to design and deliver new giving strategies for social impact. We have evolved our firm's focus to help *advance Catholic generosity globally, by animating love of neighbor and acts of mercy to give greater glory to God.*



Colleen's leadership occupations in philanthropy have inspired the Catholic service vocation of VENTURE3Philanthropy.

Colleen Durbin Mitchell serves as the Founder and Principal of VENTURE3Philanthropy LLC. Colleen's professional career has inspired three decades of service throughout the public, private and social sectors. Colleen's independence and expertise as a philanthropy advisor is distinct in its multi-lens, donor-focused approach to charitable gift planning, grant implementation and stewardship, multi-generational donor family engagement, foundation brand awareness-building, organizational effectiveness, and measuring the impact of grant making.

Colleen has led several private and operating foundations within the social sector, including Whirlpool Foundation, IMCERA Group Foundation, and NorthShore Foundation. Her extensive multi-sector experience includes public sector work on Capital Hill in the bi-partisan Congressional Arts Caucus; and service in the private sector in sales and marketing leadership roles; leading revenue and profit increases within several hundred-million dollar corporations, including global P & L of Whirlpool and KitchenAid, Bose Corporation and GN Store Nord.

WHERE CAN YOU LEARN MORE?

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CURRENT AFFILIATIONS

- International Association of Advisors in Philanthropy (AiP)
- National Council of Catholic Women (NCCW)
- National Network of Consultants to Grantmakers (NNCG)
- Association of Fundraising Professionals (AFP)
- Council of Michigan Foundations (CMF)
- West Michigan Estate Planning Council
- St. Patrick's Catholic Church Parnell, MI
- 21/64 National Staff Consultant and NextGen Trainer

THANK YOU.



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