Proceed boldly.
Inspire social impact.
Make your difference.

Venture3 Philanthropy

What's Occurring Today in Philanthropy?

Donors, foundation executives, philanthropic organizations and the professional advisors who counsel them, are experiencing dramatic shifts throughout the philanthropic landscape.

Collective Impact
Mission Investing
Blended Value

Change – and a lot of it!

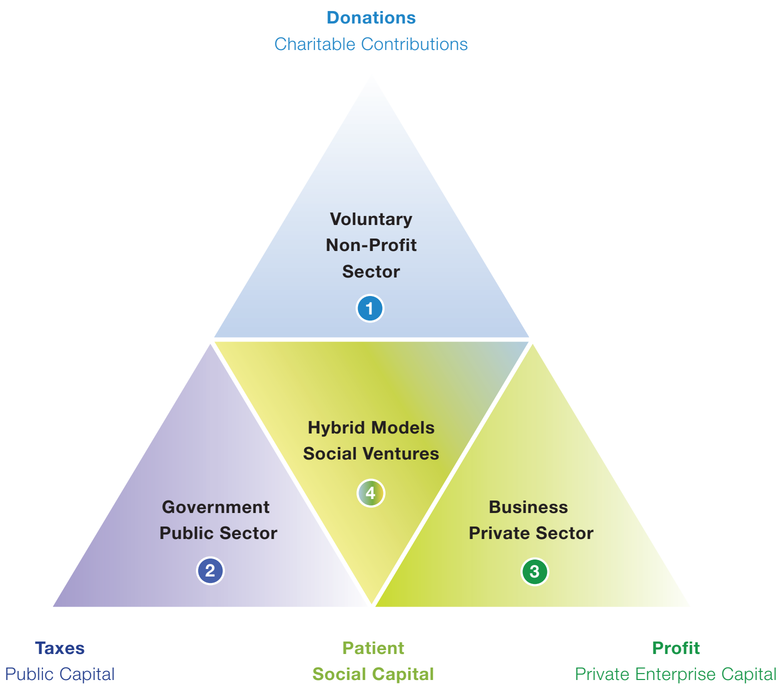
Philanthropy is evolving at hyper-speed in the new social economy. New solutions for social impact are occurring within all three sectors, no longer limited to the non-profit sector. Hybrid ventures for social engagement are surfacing at the intersection of the sectors, creating new, innovative models to maximize both financial and social returns. New terminology, approaches and players are fueling the excitement of philanthropy but also adding to the confusion of what it all means and how best to participate and make a real difference.

Capable leadership continues to emerge at this nexus, helping to navigate these complexities. Philanthropy Advisors have become increasingly the go-to specialists, partnering as trusting guides to help clients navigate the changing environment, design the strategies that achieve their philanthropic goals and help maximize the placement of their private wealth for the benefit of the greater-good.

Let us help you embark on this new undertaking, transforming your approach to philanthropy; changing the lives of others as well as your own.

Meet VENTURE3Philanthropy LLC
Proceed Boldly.
Inspire Social Impact.
Make Your Difference.

Cross-sector Snapshot of Today's "Philanthropy"



1

- Crowd Funding
- Donor Advised Funds
- E-Giving & Mobile Giving
- Giving Circles
- Program-related Investments (PRI's)
- Strategic Philanthropy
- Venture Philanthropy

2

- Social Impact Bonds/UK
- Social Innovation Fund (SIF)

3

- Cause-related Marketing
- C-suite volunteer Board engagement
- Employee Volunteerism
- PhilanthroCapitalism
- Social Entrepreneurship
- Socially-Responsible Investing
- Venture Capital

4

- Benefit Corporations (B-Corps)
- Collective-Impact Collaborations
- Corporate Social Responsibility
- Impact Investing
- Low-profit Limited Liability Corporations (L3C's)
- Micro-lending
- Public-Private Partnerships
- Social Entrepreneurship

Who is VENTURE3Philanthropy LLC

We are a leading philanthropy advisory firm serving at the nexus of all three sectors to inspire and support donors, professional advisors, foundations, and social entrepreneurs in designing and delivering new strategies for social impact.

Colleen D. Mitchell serves as the Founder and President of VENTURE3Philanthropy. Colleen's work has spanned nearly three decades throughout the public, private and non-profit sectors, leading donor engagement and stewardship, family foundation and corporate grant making strategy development, organizational effectiveness and operational change-management, as well as brand marketing and sales leadership.

Colleen has led several Foundations within the non-profit sector, including Whirlpool® Foundation, IMCERA Group Foundation and Global Giving Program, NorthShore University HealthSystem Foundation; worked in the public sector on Capitol Hill in research; served within the private sector as a marketing and sales executive, leading revenue and profit increases within several hundred million dollar, global P & L business units within KitchenAid® appliances, Bose® speakers and Jabra® Bluetooth® headsets.

Colleen's passion is helping clients venture philanthropy at the 3 crossroads.

The Venture3Philanthropy Advantage

Value-added Distinction

Deep Philanthropic Expertise
as grantmaker, trustee, fundraiser, donor

Cross-sector Experience and Leadership
in public, private and non-profit sectors

Creative, Leading-edge Perspectives
influencing strategies and practical examples

What Drives Our Service?

Values

- Building trusting relationships of mutual respect & integrity
- Inspiring creativity and innovation
- Delivering results through personal accountability

Guiding Principles

- We partner to create a service experience which delights our clients and delivers their desired results
- We keep our client engagement highly-confidential, personal, custom-designed and represent clients where we can add the greatest value
- We encourage the use of all tools in philanthropy – time, talent, treasure – to affect strategy and achieve client goals

Whom Do We Serve?

Core Client Service Segments

B2C

- Individual Donors
- Next Generation Family Members
- Private business owners
- Foundations – Family, Corporate, Community

B2B

- Professional Advisors – Private Wealth Management Firms, Estate Planners, Private Bankers
- Family offices
- National Donor-advised Fund Charitable Giving Programs
- Philanthropic Organizations
- Regional Association of Grantmakers
- University-based Centers for Philanthropy
- Social Entrepreneurship Programs

What Do We Offer?

Service Expertise

Philanthropic Core Services

- Private advisor
- Organizational strategist
- Innovative program creator & collaborator

Practice Areas

- Strategic planning and portfolio development
- Trustee and board governance
- Next generation learning and engagement
- Gift agreements and management
- Gift monitoring and creating stewardship experiences
- Signature initiatives and brand management
- Program research and development
- Organizational capability and capacity assessments
- Cross-sector, community collaborations

Specialty Interest Areas

- Healthcare
- Arts and culture
- Children and families
- Education
- Animals and nature
- Faith-based organizations

How Can We Work Together?

Venture3 Philanthropy Client Introduction

Initial Engagement

- Confidential review of high-level wealth plan to understand client goals and integration of philanthropy
- First client engagement of listening, learning, play-back and listen some more
- Early observations offered and service support options shared
- Align around client presenting need and philanthropy advisor role and desired outcomes
- Provide timely written proposal and letter of consulting agreement
- Create a project plan of work
- Client service experience begins!

Philanthropy Strategic Planning

Programs & Community Outreach

Social Investment Initiatives

What Results Can You expect?

Donors

"I have traditionally thought of myself as a "checkbook donor." But given my growing interest to understand the results of my gifts, particularly where I am serving on the Board, I am not sure what more I can do to generate more understanding and impact…"

Created a personalized, strategic framework reflecting donor values and vision. Translated giving intentions into a "portfolio" approach of funding priorities, approaches, tools, specific organizations and multi-year gift investments which express client's desire to create both a "Living" and "Lasting" Legacy. Designed gift stewardship meetings to help donor understand the gift outcomes and impact.

"I am anticipating a liquidity event with significant tax implications and impact to my estate plans… How do I bring my children into our family philanthropy, create a collective giving experience to introduce them to what's important to us without divulging the financial details of my estate?"

Co-designed with the family foundation founding trustees, a family retreat to introduce the founder's giving intentions for the family and the greater community. Supported the exploration of a new grant, made by a collective, family giving experience. Facilitated the family's engagement through the entire grantmaking experience.

Professional Advisors

"I have a client whose relatives left them far more money than they can spend in their lifetime. They have decided to donate a significant portion to charity. Our firm has worked with them to set up the giving vehicles that are best suited for their goal of capital preservation and provide for support to issues they care about. Now they need help devising a giving strategy…"

Partnered with client and co-designed the steps the family could take, for a thoughtful and personalized philanthropy strategy, consistent with their values and the pace at which they wanted to take. Helped educate the client about philanthropy, the variety of vehicles, tools and approaches, so decisions suited the client. Developed a Philanthropic Gift Agreement to clarify and document their giving goals, intentions and stewardship expectations, prior to gift transmittal.

"Our firm is growing, with more and more of our clients asking us about philanthropy. We include philanthropy into the service mix of our firm but want to make sure our partners have a good handle on today's changing philanthropic environment "

Designed a conversational, lunchtime Partners Overview, highlighting current trends in philanthropy and mission investing. Partners became more knowledgeable generally about the evolving field and approaches to become more proficient in responding to questions their clients might ask as it relates to philanthropy planning, integrated as part of an overall wealth management plan.

Private Foundations

"How do I integrate our company foundation with our global giving program into one cohesive, philanthropic strategy?"

Designed a global corporate citizenship strategic plan, process and operating framework, aligned to company growth goals and global community needs. A new Global Giving Strategy resulted after significant engagement with Foundation President, Company CEO, global corporate executives, sustainability leadership and employees. Recast the general funding priorities into specific funding goals with targets and metrics. An aligned corporate citizenship and foundation program resulted which identified significant global social risks and opportunities for "blended value creation" throughout the client's key international communities.

"After several decades of operation and new trustees recently elected to our Board, we need help updating our governance role and grantmaking strategies."

Planned a trustees retreat with the Chair of the Board which encouraged new discussion and exploration for how best to add value in a more generative manner. Trustees retreat also clarified organizational vision, mission, values, and guiding principles which served as the basis for updating their grantmaking program.

What Results Can You expect?

Social Entrepreneurs

"How can we introduce foundation trustees and staff to the evolving for-profit entities that are now offering social impact, separate from the traditional non-profit models? How can we excite and inspire our trustees to want to learn more?"

Co-designed a Learning Seminar for a Regional Association of Grantmakers to educate their Trustees and CEO on the changing landscape of Mission Investing for social impact. Designed a continuum of approaches and options within the landscape of social impact. Provided definitions and examples of foundations who are actively pioneering and piloting innovative ways for social engagement.

"There's a pipe fill gap in the Midwest of entrepreneurs leading enterprises attempting to solve important social issues, as well as interest impact investors to provide important and timely capital for early-stage support."

Invited to join the founding Advisory Committee to help create, launch and sustain a new business accelerator for social enterprise in the Midwest. Helped source prospective investors and mentors to support the new start-ups that have the capability and capacity for delivering a double-bottom line: social impact and profitability.

What Results Can You expect?

Philanthropic Organizations

"It has been several years since we last completed an organizational review – we need help understanding our current and future capabilities and capacity to take our organization to the next level of performance; understanding our customer's priorities and point of view to help shape our future direction."

Designed an Organizational Capacity & Capability Review (OCC) process and report, which captured the feedback from 40 organizational stakeholders – including trustees, staff and members – to identify key learning's, recommendations and implications to shape and inspire the organization to the next level of greatness and effectiveness.

Where Can You Learn More?

Contact Us

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Current Industry Professional Affiliations

- Member & Advisory Cabinet - Council of Michigan Foundations (CMF)
- Associate Network member - Donors Forum, IL
- Member - International Association of Advisors in Philanthropy (AIP)
- Member - National Network of Consultants to Grantmakers (NNCG)
- Primary Research Investor – Dorothy A. Johnson Center on Philanthropy, GVSU, MI
- Founding Advisory Committee – Impact Engine (IE), LLC
- Collaborator - Mission Throttle, L3C, MI

Thank You.

Venture3 Philanthropy