



Philanthropic Advising Services

Fast-forward
to one year
from today!

What are the most important accomplishments you would like for your foundation in the next year?

- Clarify mission or program areas
- Find more effective grantees or achieve more tangible community impact
- Launch an entirely new program area
- Leverage money for your causes with other donors
- Evaluate the results of your past giving - so you can change direction as needed
- Work more smoothly as a family; change the board composition or the division of labor
- Resolve donor dilemmas: How do you gain expertise? Do you give anonymously? How do you provide information to the public? How do you say no?

Want help
making this
vision
a reality?

Philanthropy Vision can help make your foundation aspirations a reality. We can:

- Facilitate foundation meetings, retreats, or conference calls
- Lead you through a mission/vision clarification process
- Strengthen decision-making processes and governance structures
- Research new program areas or grantees - including under-funded areas and international giving
- Manage your grantmaking - or mentor a family member to do so more confidently
- Clarify family roles - resulting in more collaborative giving and positive experiences by all family members
- Connect you to other donors and experts
- Provide wilderness retreats for focus and fun

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How is
Philanthropy
Vision unique?

Philanthropy
Vision advisors

Sample Clients:

Bock Family

Changemakers

East Bay Community Foundation

Global Greengrants Fund

Hewlett Foundation

Resource Generation

Schregardus Family Foundation

Winch Family

Women's Funding Network

PV's advisors have had rich, extensive careers in the philanthropic and non-profit worlds. We have been family philanthropists, international givers, nonprofit executives, financial advisors, and entrepreneurs. We are closely tied to social change philanthropy movements nationally and internationally. Most importantly, we are trained coaches who infuse everything with a "coaching" perspective: We help you create a vision of where you would like to be, and then we help you to accomplish those goals in an experiential, inclusive, creative, fun, and efficient way.

Lisa Tracy

Lisa has over 20 years of experience in advocacy on human rights, the environment, women, health, microenterprise, prison inmates, and international giving. Lisa is a philanthropic advisor and a certified coach; she has also been a nonprofit executive, grantmaker, and financial advisor, and was among the first in the country to earn the Chartered Advisor in Philanthropy designation. She loves working with people who have a burning desire to change the world, young people, and family foundations exploring social change. Lisa brings passion, irreverence, truth-speaking, and a grassroots perspective to her work.

Miles Smith

Miles is a philanthropic advisor and coach specializing in donor engagement, family succession issues, community leadership, and sustainability. With over 15 years experience as a trustee for a family foundation and 10 years as an entrepreneur, he brings a unique blend of experience that emphasizes strategy, impact, creativity, and a passion for philanthropy. His foundation's approach to working with grantees as co-grantmakers has garnered national interest. Miles believes that philanthropy can be fun, collaborative, and impactful, all while feeding one's curiosity and passions.

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Philanthropy Vision

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