

A HERITAGE OF EXCELLENCE SERVING INDIVIDUALS, FAMILIES AND FOUNDATIONS

ABOUT ROCKEFELLER PHILANTHROPY ADVISORS

Rockefeller Philanthropy Advisors helps donors create thoughtful, effective philanthropy throughout the world. The organization, a 501(c)(3) nonprofit, was developed by the Rockefeller family as its private philanthropy service, and traces its antecedents to John D. Rockefeller, Sr., who in 1891 began to professionally manage his philanthropy “as if it were a business.” Rockefeller Philanthropy Advisors represents the cumulative knowledge and experience of more than a century of high-quality professional service to America's most philanthropic family.

Rockefeller Philanthropy Advisors currently serves more than 160 donors in facilitating and advising on almost \$200 million in annual gifts and grants to more than 60 countries in Africa, Asia, the Caribbean, Europe, Latin America and North America.

Rockefeller Philanthropy Advisors provides research and counsel on charitable giving, develops philanthropic programs, and offers complete program, administrative and management services for foundations and trusts. It also operates a charitable gift fund (The Philanthropic Collaborative) through which clients can make gifts outside the United States, participate in funding consortia, and operate nonprofit initiatives. Rockefeller Philanthropy Advisors is one of the world's largest philanthropy services, with 40 full-time staff in our New York, Los Angeles and San Francisco offices.

SAMPLES OF OUR RECENT WORK

Rockefeller Philanthropy Advisors has worked closely with many leading foundations, nonprofit and governmental organizations in providing a full range of regranting, program evaluation, special project management, fiscal sponsorship and strategic planning services. What follows are samples of recent work we have done in these areas for a variety of foundations and community-based organizations.

I. Family Philanthropy – Strategic Development and Ongoing Management

Rockefeller Philanthropy Advisors helps individuals and families with their philanthropy in a variety of ways, from creating and implementing large, complex grantmaking programs, to negotiating and structuring major legacy gifts.

For example, Rockefeller Philanthropy Advisors developed and implemented a grantmaking strategy for a family foundation interested in making a difference in the U.S., the UK, and Israel, in the areas of higher education, World War II history, and healthcare. Rockefeller Philanthropy Advisors developed five program areas, including Environment and Clean Energy, Arts, Education, Medical Research, and Family Legacy, and identified goals and strategies for each area. We also oversaw the hiring of an investment consultant, auditor, and website developer and created comprehensive operating principles and procedures. We continue to manage the foundation's grantmaking work with a team of advisors with issue area expertise.

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In addition, Rockefeller Philanthropy Advisors has helped individuals and family foundations make large, complex, legacy gifts which required significant planning, measurable objectives, and continued oversight. These gifts include large gifts to universities for the creation of new programming, fellowships, and a loan forgiveness program.

II. Field Research and Program Evaluation

A grant program was designed in partnership with the W.K. Kellogg Foundation to empower emerging donor communities – notably the African American, Latino, Asian American, Native American and underserved immigrant communities – to lead, develop and grow philanthropic resources that address community causes. In 2007, its pilot year, RPA awarded over \$2.5 million to more than 20 nonprofits across the United States. RPA’s services included field research, collaborative facilitation of field discussions on the issues of community philanthropy and full launch and implementation of the grant program.

III. Philanthropic Knowledge Leader

Rockefeller Philanthropy Advisors has published monographs and reports on the topics of diversity, family philanthropy, venture philanthropy, and the arts, among others. In 2008, RPA released *Philanthropy’s New Passing Gear: Mission-Related Investing*, a comprehensive, practical guide that translates the concepts, ideas and philosophy of mission-related investing (MRI) into useable policies and practices for foundation trustees. *Philanthropy’s New Passing Gear* includes 12 case studies that reflect the diversity of approaches used by organizations currently practicing MRI. The guide and its appendices also contain tools and templates for creating and executing MRI strategies.

IV. Regranting Programs

In 2005, the New York State Music Fund was created by settlement funds resulting from a series of investigations by the New York State Attorney General’s Office of major recording and broadcasting companies that had violated state and federal laws prohibiting “pay for play” (also called “payola”). RPA designed a program that would benefit the audiences and music community of New York State by addressing the access issues at the heart of the settlements. The grants program consisted of a massive statewide open application system which reviewed over 700 applications, and awarded almost 400 grants totaling over \$36 million within 18 months from inception. Intensive statewide outreach and technical assistance workshops and consultations were offered to ensure successful applications addressing underserved rural and minority communities.

V. Fiscal Sponsorship and Special Projects Management

Rockefeller Philanthropy Advisors served as the fiscal sponsor for the Strong American Schools initiative, a nonpartisan public awareness and action campaign aimed at elevating education to the top of the list of our nation’s priorities through a vigorous and detailed discussion of the issue by the presidential candidates in 2008. This was a \$60 million campaign funded by the Bill & Melinda Gates Foundation and the Eli & Edythe Broad Foundation. RPA provided comprehensive management and administrative services and was responsible for all activities of the campaign, from hiring of staff and consultants to oversight of on-the-ground events. RPA’s fiscal sponsorship capability allows it to provide a sophisticated infrastructure for complex nonprofit initiatives.

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