

**SKILLS FRAMEWORK FOR FINANCIAL SERVICES  
TECHNICAL SKILLS AND COMPETENCIES (TSC) REFERENCE DOCUMENT**

<b>TSC Category</b>	Customer Relationship and Stakeholder Management					
<b>TSC</b>	Philanthropy Advisory (New)					
<b>TSC Description</b>	Coordinate, plan and advise on philanthropic framework and objectives as part of overall wealth planning goals					
<b>TSC Proficiency Description</b>	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b> <b>(To be updated with TSC code)</b>	<b>Level 4</b> <b>(To be updated with TSC code)</b>	<b>Level 5</b> <b>(To be updated with TSC code)</b>	<b>Level 6</b>
			Support the identification of philanthropic objectives as part of overall wealth planning goals	Support the implementation and establishment of appropriate philanthropic structure/vehicle as part of overall wealth planning goals	Oversee the establishment of philanthropic structure/vehicle as well as the implementation framework/methodology and processes to achieve philanthropic goals	
<b>Knowledge</b>			<ul style="list-style-type: none"> <li>Questioning techniques to identify philanthropic needs</li> <li>Basic knowledge of scenarios, keywords that signal philanthropy opportunities</li> <li>Broad knowledge of relevant global themes and development goals in relation to philanthropic goals</li> <li>General knowledge of types and trends of Philanthropy concepts (e.g. foundations, NPOs, charitable donations, grant-making, in-house programs, social entrepreneurship, impact investing) and actionable methods</li> <li>General knowledge of types of philanthropy vehicles</li> <li>General knowledge of key stakeholders for philanthropy planning (internal and external, e.g. lawyers, tax advisers) and beneficiaries of various philanthropic activities</li> <li>General knowledge of philanthropy ecosystem, networks, collaborative platforms, regional organisations</li> <li>Differentiate general investing from impact investing and understand the role of both for philanthropists</li> </ul>	<ul style="list-style-type: none"> <li>Broad knowledge of different structures (e.g. foundations, donor-advised funds, trusts, NGOs, blended finance, corporate philanthropy) and capital allocations to enable client's philanthropic objectives</li> <li>Tax, regulatory requirements and restrictions across geographies</li> <li>Communication techniques around Philanthropic ideas and impact assessment frameworks (e.g. theory of change)</li> <li>Broad knowledge of relevant global themes and development goals</li> <li>Framework to conceptualise and structure solutions to help achieve philanthropic objectives</li> <li>Impact measurement techniques on outcomes</li> <li>Broad knowledge of philanthropy trends, opportunities, collaborative platforms, Non-Profit Organisation (NPO) field and beneficiaries</li> <li>Due diligence, project appraisals and selection of NPO projects.</li> <li>Methods for monitoring of NPO projects, issue resolution and termination</li> </ul>	<ul style="list-style-type: none"> <li>Advanced knowledge of the NPO field and structures (e.g. foundations, donor-advised funds, trusts, NGOs, impact investing, corporate philanthropy)</li> <li>Advanced knowledge of relevant global themes and development goals</li> <li>Changes and trends in donor's philanthropic interests/objectives across geographies relevant to Asian clients</li> <li>Roles and accountabilities for various stakeholder groups</li> <li>Facilitation methodologies to work with clients and relevant stakeholders</li> <li>Knowledge of research gaps to spearhead advancements in Philanthropy</li> <li>Strategies to create awareness among the community in philanthropy</li> <li>Key considerations in formulating client's needs on social impact versus financial return in social investing</li> <li>Reporting standards on Key Performance Indicators for Philanthropy</li> <li>Advanced understanding of impact assessment frameworks and implementation</li> </ul>	

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<p><b>Abilities</b></p>		<ul style="list-style-type: none"> <li>• Articulate common philanthropic objectives</li> <li>• Connect common philanthropic structures to philanthropic objectives</li> <li>• Identify basic philanthropic objectives based on donor's value/family legacy system, professional background/business nature, history of philanthropy in family, and structured probing during review with donor</li> <li>• Work with relevant advisors and subject matter experts to advise on and support donor's philanthropic aspirations</li> <li>• Participate in due diligence of potential beneficiary NGOs</li> <li>• Participate in delivery of in-house philanthropy programs</li> </ul>	<ul style="list-style-type: none"> <li>• Research and provide updates on any new developments in Philanthropy</li> <li>• Manage onboarding and acceptance of stakeholders and beneficiaries</li> <li>• Support the implementation of philanthropic objectives</li> <li>• Articulate performance measurement of common philanthropic objectives of private clients</li> <li>• Monitor in-house managed philanthropy programs and outsourced philanthropy programs</li> <li>• Perform quality assurance on periodic reviews of philanthropy projects</li> <li>• Conduct research and gather industry standards on various philanthropy initiatives</li> <li>• Manage and oversee development of a framework to achieve philanthropic goals</li> <li>• Enable or oversee philanthropic objectives</li> <li>• Alignment of philanthropic goals with local regulatory requirements</li> <li>• Oversee measurements of philanthropic outcome</li> <li>• Review measured data on philanthropic outcome against client's stated objectives</li> <li>• Maintain and develop NPO network by performing due diligence, non-profit project's appraisals and selection</li> </ul>	<ul style="list-style-type: none"> <li>• Determine an effective framework to assist, monitor and manage internal and external stakeholders in achieving philanthropic goals</li> <li>• Envisioning and design of new philanthropy programs for in-house delivery or outsourced delivery</li> <li>• Source appropriate NGOs and initiatives to meet donor interests</li> <li>• Oversee stakeholder relationships to ensure positive and effective engagement between donor and all stakeholders.</li> <li>• Spearhead outreach, networking and engagement with donors, NGOs and stakeholders</li> <li>• Drive thought leadership and awareness in philanthropy</li> <li>• Analyse and report on changes to client's philanthropic interests/objectives</li> <li>• Apply market and industry knowledge relating to impact investing and/or corporate philanthropy sector</li> <li>• Formulate policies and guidelines around Philanthropy for private clients and institutions</li> <li>• Develop reporting standards on appropriate Key Performance Indicators for Philanthropy</li> <li>• Develop methodology to translate client's needs for social impact versus financial returns into actionable philanthropic strategies and measurable outcomes</li> </ul>	
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