Most families give generously. Very few give strategically.

There's a difference. And it matters more than most people realize.

STRATEGIC PHILANTHROPIC PLANNING & IMPLEMENTATION

An introduction to Erdle Consulting Group and The Philanthropy Practice

Independent philanthropic advisory for families, foundations, and the advisors who serve them.

Erdle Consulting Group
Alexandria, Virginia | erdleconsulting.com

INSIDE THIS PACKET

A guide to giving with clarity, confidence, and impact.

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"The real question was never how much people give. It's how."

ALLISON ERDLE, FOUNDER

INTRODUCTION

Giving well asks for more than a check.

Most of the families I meet are deeply generous. They give every year. They give to causes they love. And many of them tell me the same thing: they sense their giving could be doing more, but they aren't sure where to start.

That isn't a failure of generosity. It's a gap in structure. High-net-worth families bring real discipline to how they build, protect, and transfer wealth. Their giving rarely gets the same care, even as more than $617 billion moves through private giving in the United States each year.[2] The result is reactive giving, idle donor-advised funds, family tension, and nonprofits left guessing from one year to the next.

Erdle Consulting Group exists to close that gap. Through The Philanthropy Practice, we help donors, families, and foundations turn good intentions into a clear, multi-year plan. We work alongside your wealth, estate, and tax advisors so your giving fits the rest of your financial life.

This packet explains who we are, what we believe, and how we work. It also walks through the moments when clients, and their advisors, most often realize they need a better plan. I hope it sparks a conversation. The first one is always complimentary.

Warmly,

Allison Erdle

Founder, Erdle Consulting Group

WHO THIS PACKET IS FOR

Donors & Families

You give generously and want your giving to reflect your values, engage your family, and make a measurable difference.

Foundations

You steward a shared mission through generational change and want governance and grantmaking that hold up over time.

Advisors

Your clients ask about giving. You want a trusted, independent partner who helps them well and reflects well on you.

ABOUT ERDLE CONSULTING GROUP

Elevating philanthropic practice.

Independent philanthropic advisory for families, foundations, and the advisors who serve them.

Founded in 2006 and based in Alexandria, Virginia, Erdle Consulting Group is an independent philanthropic advisory firm. We guide high-net-worth individuals, families, and foundations from philanthropic assessment to multi-generational legacy, toward giving that is intentional, values-aligned, and measurably effective.

Philanthropic strategy is its own discipline. It draws on finance, wealth management, and community knowledge, but it is a distinct, learned skill. Some clients need a focused plan for a single year. Others want a long-term partner as the family and its giving evolve. Either way, we help you move from overwhelmed to intentional, and from well-meaning to genuinely effective.

2006	Independent	30+ years	$25M
Founded	No fundraising. No asset management. Our only agenda is yours.	Across nonprofit, philanthropic, and advisory work	Family foundation led as Executive Director

WHO WE SERVE

Individual donors & business owners	Often navigating a liquidity event, retirement, or a transfer of wealth. Ready to give more, but wary of making a mistake or turning giving into a full-time job.
Families & family foundations	Working through generational transitions, a shared sense of purpose, and governance that has to outlast its founders.
Wealth, estate, tax & family office advisors	Looking for a trusted, independent partner for the philanthropic side of a client's financial life. You keep the relationship. We return your client with a plan that complements their wealth strategy.

WHY ERDLE CONSULTING GROUP

Independent by design

We don't fundraise and we don't manage assets. Your giving isn't limited by geography or shaped by anyone else's goals.

Rooted in your values

Every plan starts with what matters to you and your family, not with a menu of causes or someone else's priorities.

Coordinated with your advisors

We work alongside your estate, tax, and investment team so philanthropy never sits in a silo.

Built on real experience

Thirty-plus years on every side of the sector, and a best-practice method grounded in real transformation.

> *High-net-worth clients rank independent philanthropic advisors (23%) above their wealth, legal, and tax advisors (19%) for the most valuable giving guidance.*[7]

ABOUT ALLISON ERDLE

Every side of the philanthropy table.



Allison Erdle
Founder
Erdle Consulting Group

Allison Erdle has spent 30 years on every side of philanthropy: nonprofit professional, major gift fundraiser, international corporate giving, foundation executive director, and 4th-generation board member of her own family's foundation. She has worked locally, regionally, and internationally across education, health, safety net, and global development.

As Executive Director of the Washington Forrest Foundation, she managed a $25 million family foundation that granted more than $1 million each year to safety net, health, and education initiatives in Arlington, Virginia. She worked alongside the Arlington County Board, nonprofits, and private funders on locally defined priorities: youth out-of-school-time needs, marginalized communities, and the COVID response.

She founded Erdle Consulting Group in 2006. It is where she built the process at the heart of her practice: a structured way to turn good intention into a multi-year plan with real, measurable impact.

"Generosity, practiced well, with intention, dignity, and awareness has the power to change lives."

ALLISON ERDLE, FOUNDER

WHAT HER WORK HAS TAUGHT HER

Running a family foundation confirmed two things. First, the work nonprofits do is too vast and too vital to be absorbed by government if the sector fails. Second, what nonprofits see on the ground often differs from what funders assume the need to be. Allison holds the trust of nonprofits and the people they serve, and she connects community members, nonprofits, and donors so they can work together on the greatest local needs.

EDUCATION & EXPERIENCE

Education	BA in History, Davidson College | International MBA, University of South Carolina | Executive Certificate in Philanthropic Leadership, Georgetown University
Experience	International fundraising, Pan American Development Foundation | Angel investing fund experience | Works alongside advisors managing close to $100 million

THE PHILANTHROPY PRACTICE: OUR PHILOSOPHY

Philanthropy isn't a one-time event. It's a practice.

Like a sport, yoga, or a musical instrument, giving well is something we keep coming back to. We reflect. We adjust. We re-engage. The Philanthropy Practice is the name of our method. It is also how we believe giving should feel: deliberate, evolving, and joyful.

We believe communities flourish when philanthropy is practiced with intention. We have seen the value left on the table when donors give without focus, and the cost to the nonprofits, communities, and economies that depend on a healthy third sector. With one in three nonprofits facing government funding disruptions and demand still rising, strategic giving is no longer just an opportunity. It is a necessity.[3]

WHAT WE BELIEVE

- **The question is how, not how much.** The problem in philanthropy isn't a lack of generosity. It's a lack of strategy.
- **Proximity matters.** Nonprofit staff are closest to the roots of community need. Donors who get closer see more clearly and fund more wisely.
- **Consistency beats scatter.** Multi-year, trust-based partnerships let nonprofits plan, hire, and grow, instead of re-earning support every spring.
- **Philanthropy belongs in the whole plan.** Giving should work alongside your estate, tax, and wealth strategy, not apart from it.
- **Giving should bring joy.** There is real joy in knowing your giving is doing exactly what you hoped it would.

FROM OVERWHELMED TO INTENTIONAL

GIVING WITHOUT A PRACTICE	GIVING WITH A PRACTICE
Reactive, request-driven giving	**Focused giving aligned with your values**
The same grants renewed on autopilot	**Grants reviewed for fit and impact**
Donor-advised fund balances that sit idle	**A multi-year plan that moves capital with purpose**
Family members pulling in different directions	**A shared vision the next generation inherits**
Saying no feels personal and awkward	**A clear framework, and third-party validation, for declining what doesn't fit**
Never quite sure it's working	**Regular impact checks and room to adjust**

OUR APPROACH

Four areas. One strategic journey.

We bring the same discipline high-net-worth families apply to managing their capital to the way they manage their giving. It starts with an honest assessment across four areas.

01

Philanthropic Identity *Who you are as a giver.*

We start before strategy. We surface your values, what first drove your giving, your family's giving history, your risk tolerance, and the generational dynamics that shape any shared vision.

Why it matters: Givers without a clear mission default to reactive, relationship-driven giving with limited impact. Shared values make every later decision easier and more durable.

02

Operational Excellence *How you give, not just what.*

We examine the infrastructure behind your philanthropy: time, knowledge, structures, and family dynamics. That includes the plan for your donor-advised fund or foundation, and whether your approach unintentionally limits the organizations you're trying to help.

Why it matters: Chronic underfunding of organizational capacity is the single biggest driver of poor philanthropic outcomes. Donors who understand nonprofit funding become fundamentally better partners.

03

Strategic Grantmaking *Focus over scatter.*

We help you build a portfolio of purposeful giving. We identify real focus areas, build your knowledge of the issues, bring you closer to the communities you serve, and fund in ways that give nonprofits a genuine runway.

Why it matters: Most donors give small amounts to many issues. That means high scatter and low impact. Strategic focus, even starting narrow, dramatically increases the chance of meaningful change.

04

Impact & Vision *What does success look like?*

We anchor everything to a vision of real change, grounded in your values. Then we build the indicators, timeline, and accountability to know your giving is working, and to adjust if it isn't.

Why it matters: Impact isn't just a metric. It's a commitment to accountability and a discipline of learning. Donors whose vision of change comes from their own values create the most durable transformation.

HOW AN ENGAGEMENT WORKS

Assess. Plan. Integrate. Practice.

1
ASSESS

A point-in-time philanthropy assessment. We review values, risk tolerance, family engagement, administrative needs, grantmaking focus, and impact goals, and name the gaps and barriers.

2
PLAN

A written philanthropy plan across all four areas. You choose which priorities to tackle, with our support or on your own.

3
INTEGRATE

We align the plan with your estate plan, wealth strategy, foundation or DAF structure, and tax timing, working directly with your advisors.

4
PRACTICE

We implement, measure, and adjust. Plans can cover a single year or evolve with your family across generations.

WHAT YOU WALK AWAY WITH

- **Clarity.** A written statement of your philanthropic identity, values, and what you want your giving to do.
- **A benchmark.** An honest assessment of where your giving stands today, measured against effective practices.
- **Focus.** A defined portfolio of priorities and a multi-year grantmaking framework.
- **Structure.** Governance, decision-making, and giving-vehicle recommendations that fit your family.
- **Accountability.** Impact indicators and a timeline, so you always know whether your giving is working.
- **Coordination.** A plan your estate, tax, and wealth advisors can build around.

EFFECTIVE PRACTICE CAN BE SIMPLE

It might be a family agreeing on how they will decide before debating what to fund. Or committing to a nonprofit for five years instead of asking it to re-earn support every spring.

THE ECONOMIC CASE FOR PHILANTHROPIC PLANNING

Why how families give matters far beyond charity.

Philanthropy isn't struggling because people care less. It's struggling because the system runs on good intentions instead of strategy. Reactive, relationship-driven gifts leave nonprofits guessing year to year instead of building for the long term. And when the nonprofit sector is weakened, local and regional economies feel it directly.

THE HIDDEN MARKET

$1.5T
Annual economic contribution of U.S. nonprofits, over 5% of GDP.[1]

14M+
People employed by nonprofits, the third-largest private workforce in the country.[1]

$617B
Given to U.S. charities in 2025, the first year above $600 billion.[2]

We would never manage a $617 billion industry the way we manage charitable giving. Unless that industry was philanthropy.

We can do better.

Giving has shifted dramatically over the last 25 years, from a mostly transactional, top-down practice toward something more strategic and relational. Not every donor has caught up. Giving decisions are still made one request at a time, often with no written plan, no shared family vision, and no way to know what's working. Layered governance and long-standing board habits rarely change quickly, even with the best of intentions.

A SECTOR UNDER STRAIN

1 in 3
Nonprofits that faced a government funding disruption in early 2025.[3]

81%
Of nonprofits say raising funds that cover their full costs is a challenge.[4]

85%
Of nonprofits expected demand for their services to rise in 2025.[4]

Government funding to nonprofits is roughly three times the size of all foundation giving.[3] Philanthropy cannot replace those dollars on its own. It can make every private dollar work harder: funding with focus, committing for more than a year at a time, and covering the real cost of the work.

CAPITAL IS ACCUMULATING FASTER THAN IT IS DEPLOYED

$89.6B
Contributed to donor-advised funds in 2024, a five-year high.[5]

$64.9B
Granted out of donor-advised funds the same year.[5]

$326B
Now held in donor-advised funds, up from $250B a year earlier.[5]

A donor-advised fund is a useful tool. It is not a strategy. Advisors often recommend one at a liquidity event, the tax benefit is captured, and no one builds the plan for what the money is for. Meanwhile, $124 trillion is expected to change hands through 2048, including $18 trillion directed to charity.[6] Much of it will arrive through vehicles that were drafted, not designed.

THE DEMAND IS THERE. THE CONVERSATION ISN'T.

80%
Of high-net-worth clients say their advisor should raise philanthropy. 58% of advisors fear doing so.[7]

23% vs. 19%
Clients rank philanthropic advisors above their professional advisors for the most valuable giving guidance.[7]

6x
More given by self-described expert donors than by novices ($28,350 vs. $4,466). Only 4% consider themselves experts.[8]

Confidence, not sophistication, is what's missing. Only 20% of affluent donors actively monitor the impact of their gifts.[8] Families who are disciplined about every other part of their financial lives are often giving without a framework. The clients whom advisors already serve are under-asking for something on which they are under-served, and a proactive, expert-led offer wins the relationship.

> *"Philanthropy is one of the most powerful, underleveraged levers in our economy."*
>
> ALLISON ERDLE, FOUNDER

WHAT BETTER PLANNING RETURNS

- **Communities.** Stronger nonprofits mean more jobs, more services, and more civic infrastructure.
- **Families.** A shared vision for what wealth is for, with every generation holding a real stake.
- **Donors.** Giving that is measurably effective, and more satisfying over time.
- **Advisors.** A trusted partner, deeper client relationships, and a connection to the next generation.
- **Nonprofits.** Less energy chasing unpredictable dollars. More energy on the mission.

WHEN CLIENTS NEED US MOST

Ten real-world moments for advisors and families.

They haven't asked. That's not the same as not needing it.

Wealth advisors, estate attorneys, CPAs, financial planners, and tax attorneys excel at the disciplines in which they trained. None of those include philanthropic strategy, which is its own discipline, and none are supposed to. That is the gap The Philanthropy Practice fills. The absence of a client request isn't evidence of an absence of need. Usually, no one has asked the right question yet.

WHAT THE RESEARCH SHOWS

96%

Of advisors say discussing philanthropy with clients is part of their job.[7]

58%

Of advisors worry clients will question their motives if they raise it.[7]

49%

Of HNW clients consider their advisor very knowledgeable about charitable giving vehicles.[9]

HOW WE PARTNER WITH ADVISORS

You keep the relationship.	We handle the philanthropic strategy and return your client with a plan that complements the wealth, estate, and tax work you've already built.
Independent by design.	We don't fundraise and we don't manage assets, so a referral is never a conflict of interest.
On your timeline.	We work alongside your team at the moments that matter: estate settlement, liquidity events, foundation formation, and year-end planning.

AT A GLANCE

Ten moments to listen for.

	SCENARIO	WHO SEES IT FIRST	THE TRIGGER
01	**The Widow Who Inherits the Giving, Not Just the Assets**	Estate Planning	A spouse who ran the family's giving dies
02	**The Foundation That Was Drafted, Not Designed**	Estate Planning	A family forms a foundation or giving vehicle
03	**The DAF That Becomes a Parking Lot**	Wealth Management	A business sale or concentrated stock position
04	**The Advisor Who's Afraid to Bring It Up**	Wealth Management	A client mentions wanting to “do more”
05	**The Stock Gift That's All Tax, No Strategy**	Accounting & Tax	A year-end gift of appreciated securities
06	**The Bunching Strategy With No Giving Plan Behind It**	Accounting & Tax	Several years of giving bunched into one year
07	**The Plan Where “Charitable” Is One Line Item**	Financial Planning	A comprehensive financial plan is built
08	**The Post-Exit Identity Vacuum**	Financial Planning	A business owner sells the company
09	**The Compliant, Directionless Private Foundation**	Tax Attorneys	A foundation on compliance autopilot
10	**Family Office Formation During Business Succession**	Family Office	A family office forms for the next generation

FOR DONORS & FAMILIES: SIGNS YOU MAY BE READY

You don't need an advisor to raise it. If two or more of these sound familiar, it may be time for a conversation.

- More requests arrive than you can thoughtfully answer.
- A liquidity event, retirement, or inheritance is underway.
- Your donor-advised fund grows faster than your grants.
- Your foundation renews the same grants on autopilot.
- You want to bring the next generation in but aren't sure how.
- You wonder if your giving is working, or fear it will become a full-time job.

SCENARIO 1 | ESTATE PLANNING

The Widow Who Inherits the Giving, Not Just the Assets

THE MOMENT	A husband who ran the family's giving for 30 years dies. The estate attorney retitles assets and updates the foundation's signers. No one helps his wife decide what she wants her giving to look like, at the moment she has the least bandwidth to learn.
BY THE NUMBERS	Nearly $40 trillion of the $54 trillion in spousal transfers expected through 2048 will go to widowed women.[6] 70% of widows change wealth advisors within a year of their spouse's death.[10]
WHAT'S MISSING	*Legal succession of a giving vehicle isn't strategic succession of a giving practice.*
HOW WE HELP	We run a Philanthropic Clarity Plan alongside the estate settlement, not after it, rebuilding the giving strategy around her values and the family's next chapter.

THE QUESTION TO ASK

"When we update the foundation or DAF paperwork after a death, is anyone helping the surviving spouse decide what she wants her giving to look like going forward?"

SCENARIO 2 | ESTATE PLANNING

The Foundation That Was Drafted, Not Designed

THE MOMENT	A family commits a meaningful gift to start a private foundation. The documents are drafted well, but there is no mission, no board roles, and no grantmaking plan. The founding year passes without a grant. Or parents create a giving vehicle for their children that sits on file, unused, until both parents are gone.
BY THE NUMBERS	Private foundations must distribute 5% of assets each year. Excise taxes can reach 30% of undistributed income, with an additional 100% tax if the shortfall isn't corrected in time.[11]
WHAT'S MISSING	*The document exists. The institution doesn't.*
HOW WE HELP	Our Strategy + Implementation Plan runs alongside the attorney's drafting, so the foundation opens with a working strategy and a board that knows its role. It's also a chance for parents to build something meaningful and joyful with their children while they are still here.

THE QUESTION TO ASK

"When a family commits to a foundation, who is building the mission and grantmaking plan while we draft the governing documents?"

SCENARIO 3 | WEALTH MANAGEMENT

The DAF That Becomes a Parking Lot

THE MOMENT	A client sells a business. Ahead of closing, the advisor recommends funding a donor-advised fund with appreciated shares. The tax move is flawless. Two years later, most of the balance is still sitting there.
BY THE NUMBERS	DAF contributions reached $89.6 billion in 2024, while grants out totaled $64.9 billion. Total DAF assets now stand at $326 billion.[5]
WHAT'S MISSING	*The tax strategy and the giving strategy were treated as one conversation. They aren't.*
HOW WE HELP	We step in after the contribution, before the balance sits idle, and build a giving roadmap that turns the deduction into deployed capital. The plan complements a community foundation's administration while keeping guidance independent, and it gives the client a confident way to say no, or not yet.

THE QUESTION TO ASK

"Once we fund the DAF around the sale, what is the plan for moving that money out with intention over the next few years?"

SCENARIO 4 | WEALTH MANAGEMENT

The Advisor Who's Afraid to Bring It Up

THE MOMENT	A client volunteers, sits on a nonprofit board, or mentions wanting to do more with giving someday. The advisor never raises it, worried it will feel like overreach or cross-selling, and not trained to go deep.
BY THE NUMBERS	96% of advisors agree raising philanthropy is part of their job, and 80% of clients agree. Yet 58% of advisors still hesitate in practice.[7] Only 49% of HNW clients consider their advisor very knowledgeable about charitable giving vehicles.[9]
WHAT'S MISSING	*The willingness is there. The capability isn't. The advisor is right to hesitate rather than wing it.*
HOW WE HELP	As an independent, non-fundraising specialist, we handle that conversation well and protect the advisor's core relationship. We add the layer of donor values, desired impact, and nonprofit expertise.

THE QUESTION TO ASK

"You already know this client cares about giving back. Would it help to have someone on the team whose whole job is that conversation?"

SCENARIO 5 | ACCOUNTING & TAX PREPARATION

The Stock Gift That's All Tax, No Strategy

THE MOMENT	A CPA structures a year-end gift of appreciated securities. The deduction is optimized with precision. Whether the recipient reflects the family's real priorities was never part of the engagement.
BY THE NUMBERS	Only 20% of affluent donors actively monitor the impact of their gifts. Self-described expert donors give more than six times as much as novices.[8]
WHAT'S MISSING	*Due diligence on the tax return and due diligence on the grantee are two different skill sets.*
HOW WE HELP	Nonprofit vetting is a standing part of our Strategy + Implementation Plan, timed with the CPA's calendar so both happen together.

THE QUESTION TO ASK

"Once we've optimized the deduction on this gift, has anyone vetted where it's going?"

SCENARIO 6 | ACCOUNTING & TAX PREPARATION

The Bunching Strategy With No Giving Plan Behind It

THE MOMENT	A CPA recommends bunching several years of giving into one high-income year through a DAF. Smart tax planning. But the multi-year distribution plan, the whole point of bunching, never gets designed.
WHAT'S MISSING	*Bunched capital can become patient capital for nonprofits. Only if someone designs how it goes out.*
HOW WE HELP	We translate the bunched contribution into a three- to five-year grantmaking framework the moment the DAF is funded.

THE QUESTION TO ASK

"Now that we've bunched three years of giving into this DAF, what does the distribution plan look like?"

SCENARIO 7 | FINANCIAL PLANNING

The Plan Where "Charitable" Is One Line Item

THE MOMENT	A financial plan covers retirement, education, insurance, and estate coordination in depth. Charitable giving is a single line: a qualified charitable distribution or a percentage of income.
WHAT'S MISSING	*The discovery. Values, family alignment, and a grantmaking framework don't fit in a software field.*
HOW WE HELP	Our Philanthropic Clarity Plan is a companion to the financial plan: a discovery interview, a four-area assessment, a written benchmark against effective practices, a giving roadmap, and vetted organizations that meet the client's criteria.

THE QUESTION TO ASK

"The plan already has a line for charitable giving. Do we want to build out what that line actually means to them?"

SCENARIO 8 | FINANCIAL PLANNING

The Post-Exit Identity Vacuum

THE MOMENT	A business owner sells the company. The financial plan handles the proceeds in detail. It says almost nothing about what the owner does with the next chapter.
BY THE NUMBERS	93% of affluent households are more likely to give when they believe their gift will make a difference. Yet only 4% of affluent donors consider themselves philanthropic experts.[8]
WHAT'S MISSING	*A bridge from the exit to the next chapter that is more than "join a board" or "write a check to your alma mater."*
HOW WE HELP	We step in at the exit and build the knowledge, purpose, and focus to give with confidence, before high-intent capital stalls or scatters across ad hoc requests.

THE QUESTION TO ASK

"The plan handles the proceeds. Who is helping them figure out what to do with their time and their giving now?"

SCENARIO 9 | TAX ATTORNEYS

The Compliant, Directionless Private Foundation

THE MOMENT	A tax attorney keeps a family foundation perfectly compliant for a decade. No grant has ever been evaluated for impact. No one in the third generation has been asked to serve.
WHAT'S MISSING	*The foundation pays out 5% on autopilot to the same organizations, without anyone asking if it's still the right 5%.*
HOW WE HELP	We layer annual grantmaking strategy, due diligence, impact measurement, and deliberate next-generation engagement onto a foundation that is already compliant. We look at evolving practices in payout and multi-year funding, and can provide transitional administrative support.

THE QUESTION TO ASK

"The foundation is fully compliant. Is anyone evaluating whether the grants are the right ones, or bringing the next generation onto the board before it becomes a succession crisis?"

SCENARIO 10 | FAMILY OFFICE

Family Office Formation During Business Succession

THE MOMENT	A family office forms to house investments, tax, and estate structures for the next generation. The foundation or DAF is folded in as one more entity, with no governance charter, no family engagement plan, and board seats filled for optics.
BY THE NUMBERS	More than half of the $124 trillion expected to transfer through 2048 will come from high-net-worth and ultra-high-net-worth households.[6] Research from the National Center for Family Philanthropy finds that clear governance, defined roles, and structured next-generation involvement predict family cohesion.[12]
WHAT'S MISSING	*Every advisor built their piece correctly. No one owns the philanthropy and governance layer that holds it all together.*
HOW WE HELP	Our Partnership + Implementation tier gives us an ongoing seat at the table alongside the tax accountant, estate attorney, investment manager, and family office staff.

THE QUESTION TO ASK

"Everyone at this table has their piece built. Who makes sure the philanthropy works as an institution, the way the investment side does?"

ERDLE SERVICE PACKAGES

Three ways to work together.

Every engagement starts where you are. Choose a focused plan, a full strategy with implementation, or an ongoing partnership. Each one is built around your values, your family, and the advisors you already trust.

OPTION 1

Philanthropic Clarity Plan

Get clear on what you want your giving to do.

ENGAGEMENT LENGTH

A focused, defined engagement

Best for: individuals and couples starting fresh, a surviving spouse, a post-exit owner, or a companion to a new financial plan.

WHAT'S INCLUDED

- Individual discovery interviews
- Four-area philanthropic assessment
- Written benchmark against effective practices
- Strategic giving roadmap
- Vetted organizations that meet your criteria

OPTION 2

Strategy + Implementation Plan

Build the strategy and put it to work.

ENGAGEMENT LENGTH

Typically sized to one year

Best for: families aligning across generations, new foundations, and DAFs that need a plan to move capital.

WHAT'S INCLUDED

- Everything in the Philanthropic Clarity Plan
- Facilitated family strategy sessions
- Governance and entity guidance: DAF, foundation, or hybrid
- Nonprofit due diligence and vetting
- Multi-year grantmaking and impact measurement frameworks
- Coordination with your advisors

OPTION 3

Partnership + Implementation

An ongoing seat at the table.

ENGAGEMENT LENGTH

Multi-year, evolving with your family

Best for: high-net-worth families, family offices, established foundations, and families in generational transition.

WHAT'S INCLUDED

- Everything in Strategy + Implementation
- Annual grantmaking strategy and review
- Next-generation engagement and education
- Ongoing governance facilitation
- Administrative and transitional support
- Community foundation collaboration
- Standing role on the full advisor team

Fees are tailored to scope and family complexity, and discussed during an initial, complimentary conversation.

OUR FULL SERVICE MENU

Six areas of expertise.

Packages draw from six service areas. Engagements can also be built around a single need.

Philanthropic Assessment & Strategy

- Individual stakeholder interviews and values discovery
- Philanthropic identity and readiness assessment
- Grantmaking maturity benchmarking
- Impact vision, goals, and measurement framework

Family Alignment & Next Generation

- Facilitated family strategy sessions
- Multi-generational governance design
- Next-generation education and co-stewardship
- Consensus-building across stakeholders

Governance & Decision-Making Frameworks

- Administrative operation and management support
- Entity selection: DAF, foundation, or hybrid
- Decision-making structure optimization
- Strategic grantmaking leadership

Nonprofit Due Diligence & Grantmaking

- Nonprofit identification, vetting, and selection
- Funding and issue-area knowledge building
- Geographic funding and community foundation collaboration
- Grant structuring and evaluation practices

Holistic Philanthropy Coordination

- Support across estate, tax, and investment advisors
- Advanced planning for liquidity events
- DAF and giving strategies
- Integrated coordination across the full advisor team

Community & Ecosystem Impact

- Convening and community engagement
- Strengthening the philanthropic ecosystem
- Nonprofit collaboration and partnerships
- Cross-sector relationship building

FOR ADVISORS: A PARTNERSHIP THAT STRENGTHENS YOUR RELATIONSHIP

You keep the client relationship. We handle the philanthropic strategy. Your client returns with a giving plan that complements the wealth, estate, and tax work you've already built, and they return happier and better served.

- Independent and non-fundraising, so your referral is never a conflict of interest
- Expands your toolkit beyond the donor-advised fund
- Builds a relationship with the next generation of your client family

CLIENT STORIES

What becomes possible.

Every engagement looks different. The pattern is the same. A family or organization with real generosity reaches a moment where good intentions aren't enough. Here are three of those moments, and what changed when structure caught up with generosity. Some details have been anonymized to protect client privacy.

STORY 1

A Family Foundation

Twenty years of giving, no written mission, and daughters ready to take part.

WHAT CHANGED

A mission, a focused portfolio, and a path for the next generation.

STORY 2

A Multi-Generational Board

A family board spread across generations and geographies, ready to give more intentionally.

WHAT CHANGED

A distribution model and a strategic plan the whole board could stand behind.

STORY 3

A Donor-Led Family Fund

A specific goal for paid CTE internships, but no vetted view of who does the work locally.

WHAT CHANGED

A map of 15+ vetted organizations, a clear first call, and warm introductions.

WHAT THESE STORIES HAVE IN COMMON

- **We listen before we prescribe.** Every engagement started with interviews, not answers.
- **We look at the whole picture.** Twenty years of grants. Every board member's voice. Every organization doing the work locally.
- **We build structure that lasts.** Missions, policies, and models that take personalities out of the equation.
- **We leave room to grow.** Consensus isn't forced. Plans evolve with the family, the organization, and the community.

"Generosity, practiced well, with intention, dignity, and awareness has the power to change lives."

ALLISON ERDLE, FOUNDER

STORY 1 | FAMILY FOUNDATION & NEXT GENERATION

Connecting the dots on 20 years of giving

Client	A private family foundation, founded in 1997
Engagement	Philanthropic impact assessment and strategic planning
Timeline	Fall 2017 to November 2018
Giving reviewed	$9 million in foundation grants, plus $6 million+ in personal giving

The challenge

This family had given generously for more than two decades. Grants reached children and families, education, health, the arts, the environment, and government reform, locally and around the world. But the foundation had never written down its mission. The principals couldn't easily say what all that giving had added up to. And they wanted their daughters to become real participants, not passive observers.

What we did

- Reviewed every grant since 1997, looking at size, frequency, timing, and the actual purpose behind each gift.
- Met with the principals to separate personal interests from institutional priorities, and one-off grants from sustained commitments.
- Rebuilt the grant categories, refining 20+ subcategories into 7 strategic areas.
- Drafted a mission, vision, and values framework broad enough for every family member and specific enough to guide decisions.
- Designed a next-generation pathway: the Philanthropy Report as a family orientation, individual values interviews, structured conversations about each person's top three focus areas, and a clear route from participant to board member.

> **WHAT THE DATA REVEALED**
>
> *Education giving, once a major focus, had quietly fallen from 26% of giving to 14% in the most recent five years. No one had decided that. Health had grown from 17% to 21%. Seeing the full picture let the family choose its priorities on purpose.*

$9M+
Grants analyzed across 20+ years

7
Strategic giving areas, refined from 20+ subcategories

75 / 25
Strategic and discretionary giving model

What changed

The family now has a Philanthropy Report that tells the story of two decades of giving, a draft mission ready for board adoption, a five-year allocation model, and a quarterly grantmaking rhythm. Setting aside about 25% of annual giving as discretionary gives each daughter a low-stakes way to research, evaluate, and recommend grants, with the family behind her. Consensus isn't forced. It has room to grow.

The Practice in action: Philanthropic Identity | Strategic Grantmaking | Impact & Vision

STORY 2 | FAMILY FOUNDATION GOVERNANCE

Focusing a multi-generational board around a shared purpose

Client	Washington Forrest Foundation, Arlington, Virginia
Engagement	Board governance assessment, philanthropic strategy, and grantmaking alignment
Timeline	2015 to 2016
Led by	Allison Erdle, as Executive Director, with outside consultants

The challenge

The Washington Forrest Foundation is rooted in South Arlington, where its founder built his business and his family's legacy along the Columbia Pike corridor. By 2015, the family board spanned generations and geographies. Members shared a deep commitment to Arlington. They wanted to deepen those roots, build stronger relationships with nonprofits and with one another, and improve board education and engagement.

What we did

- Held governance, strategy, and grantmaking review sessions, including two rounds of individual board interviews on identity, roles, concerns, hopes, grantmaking priorities, and how funds should be distributed.
- Mapped where the board agreed, where the fault lines were, and what structures were missing.
- Defined what “giving in Arlington” really meant: impact in Arlington matters more than where a nonprofit is headquartered.
- Modeled a fund distribution plan and a governance framework that separated board and staff roles, and supported grantmaking and nonprofit relationships.

> **WHAT THE INTERVIEWS REVEALED**
>
> *Next-generation engagement was both the board's greatest hope and its greatest concern. And discretionary giving, often seen as a distraction from mission, turned out to be the key to keeping a dispersed family engaged.*

7
Board members interviewed across two phases

79 / 21
Arlington focus and discretionary giving split

2
New board members

What changed

The board gained a fund distribution model it could stand behind, and a strategic plan for grantmaking, governance, next-generation engagement, and board engagement. Per-member discretionary allocations honor individual passions without diluting the commitment to Arlington. Written policies, a new board orientation, and an “invitation to apply” process took personalities out of decision-making. A practice borrowed from the Supreme Court, letting newer members speak first, made room for every voice. And a legacy plan set the foundation up for the next generation: recording the founder's story on video, a junior board concept, and site visits that connect each member to the grantees they fund.

The Practice in action: Philanthropic Identity | Operational Excellence | Strategic Grantmaking

STORY 3 | FAMILY FUND & NONPROFIT DUE DILIGENCE

Finding the right partners for a hard-to-fill goal

Client	A donor-led family fund in Northern Virginia
Engagement	Nonprofit landscape mapping, vetting, and introductions
Focus	Paid internships and Career and Technical Education (CTE) workforce pathways
Region	Arlington, Alexandria, and Fairfax County

The challenge

A Northern Virginia family fund wanted two more long-term partners to run paid internships. The goal was specific: prepare economically disadvantaged Arlington high school graduates for high-growth CTE jobs, with room for the family to work with interns directly. The donor knew no partner would match every objective. What he lacked was a vetted view of who was actually doing this work, and a warm path to them.

What we did

- **Activated a trusted network, confidentially.** Respected local colleagues shared organizations they had personally vetted, knowing only that "a funder interested in workforce development" was asking.
- **Mapped the landscape** by geography and model, with candid notes on who serves Arlington directly and which programs teach skills rather than place workers in jobs.
- **Went deep on the strongest lead,** Bridges to Independence, gathering its certifications, required career-planning sessions, and a concrete funding wish list from its workforce lead.
- **Identified four connectors to open doors:** a workforce educator with deep Arlington Public Schools ties, a Virginia Tech STEM specialist, a utility engineering manager short on skilled electrical workers, and a CTE coordinator at Arlington Tech. Community foundation contacts widened the net further.

> **WHAT THE SEARCH REVEALED**
>
> *The right partner is often found through people, not applications. Four well-placed connectors in schools, higher education, and industry could open more doors than any directory.*

15+
Peer-vetted organizations mapped

4
Warm connectors across education, industry, and schools

3
Jurisdictions covered across Northern Virginia

What changed

The donor received a curated list of 15+ peer-vetted organizations, each with notes on fit, including Bridges to Independence, Kitchen of Purpose, Phoenix Bikes, Cornerstone Craftsman, Computer CORE, and the Alexandria Seaport Foundation. He moved Bridges to Independence to the top of his list, having heard other favorable mentions, and planned to work through the rest at a sustainable pace. None of his outreach would be a cold call. The research also gave him confidence that the programs already existed, before the funding arrived.

"Thanks so much for taking the time to pull together all of this great information."

Founder, Northern Virginia family fund

The Practice in action: Philanthropic Identity | Strategic Grantmaking

GETTING STARTED

Your first step is a conversation.

1

Schedule a strategy session

We'll learn about your giving, your family, and your goals. The first conversation is always complimentary.

2

Take stock

A point-in-time assessment shows where your giving stands today, and where it could go.

3

Choose your path

Pick the package that fits, or a single priority. Move at the pace that works for you.

COMMON QUESTIONS

Do you fundraise or manage investments?	No. We are fully independent. We don't raise money for organizations and we don't manage assets, so our guidance reflects only your goals.
Will doing this well become a full-time job?	No. The point of a plan is to reduce the burden. We design efficient systems that bring intention to your giving without demanding constant attention.
Do you replace my advisors or community foundation?	No. We work alongside them. Your advisors keep their role, and community foundations remain a strong partner while you keep your own independent goals.
Is this only for local giving?	No. Our guidance isn't limited by geography. We help you give locally, regionally, nationally, or internationally.
What if my family doesn't agree?	That's common, and it's often the most valuable part of the work. Facilitated sessions help families find shared values and a structure everyone can stand behind.
Do we have to do everything at once?	No. You choose your priority areas and implement them with our support or on your own. The practice evolves as you do.

Ready to give more intentionally?

Better charitable giving is a learning journey, with real rewards for donors, families, foundations, advisors, nonprofits, and communities.

LET'S BUILD YOUR GIVING STRATEGY TOGETHER

Schedule your Philanthropic Strategy Session

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Follow Allison on LinkedIn for regular insights: linkedin.com/in/erdleconsulting

SOURCES

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- GEO, 2025 National Study of Philanthropic Practice.
- Erdle Consulting, Strategic Capital, Strong Communities series (Parts I to V).

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