

Solutions and Service Delivery > Other Services

Title	Provision of advice on philanthropy
Code	106627L6
Range	Provision of advice on setting up and managing philanthropic activities. This applies to philanthropic activities of different kinds.
Level	6
Credit	5 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Evaluate the intentions of clients and needs of society <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate the current landscape of philanthropy and social needs in order to provide suitable suggestions or ideas • Evaluate philanthropic vision and intentions of clients in order to recommend concrete donation strategy and objectives 2. Conduct philanthropic planning <p>Be able to:</p> <ul style="list-style-type: none"> • Provide assistance in establishment and management of a foundation / charitable institution • Advise on administration and operational management of foundation / charitable institution • Advise on process and delivery regarding charities sourcing, due diligence, donation and monitoring • Advise on different kinds of donation arrangement (e.g. venture capital, in trust-free loan) that suits the needs of clients and charities 3. Deliver philanthropic <p>Be able to:</p> <ul style="list-style-type: none"> • Source and provide advice of solutions to support different philanthropic projects, e.g. social, environmental, cultural • Provide advice on fund raising activities • Consult with other professionals regarding the tax, legal and other issues of each specific philanthropic activities • Evaluate the applicable regulatory requirements of managing foundation / charitable institution and making a donation
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Structuring of charitable commitment and planning of process in accordance with the objectives and financial situation of the clients and needs of society.
Remark	