

PHILANTHROPY IRELAND

Issue Two
Spring/Summer



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Issue Two



About Philanthropy Ireland

Philanthropy Ireland is a dynamic membership organisation dedicated to advancing philanthropy in Ireland. Our aim is to cultivate a thriving community of philanthropic entities, fostering collaboration and innovation to address the most pressing societal challenges.

Established in

1998

40+

Collaborations

55+

Members

23+

Partnerships

Visit www.philanthropy.ie to explore membership opportunities, learn more about philanthropy and access philanthropy support.

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A Shared Future: Policy, Purpose, and the Road Ahead for Irish Philanthropy



Note from
Éilis Murray, CEO of
Philanthropy Ireland

Welcome to the latest edition of Philanthropy Ireland Magazine.

This issue comes at a pivotal moment for our sector. The pressures on philanthropy have never been greater. Communities are facing complex, urgent challenges—and the need for strategic, long-term giving is growing fast. Now, more than ever, we must step back, look at the bigger picture, and ask: how can we work better together to strengthen philanthropy in Ireland?

That's the spirit guiding our work at Philanthropy Ireland as we continue to support the implementation of the National Philanthropy Policy. Across the working groups, momentum is building.

- A Communications and Awareness Raising Strategy is nearing final stages of

completion for sign off by the Department of Rural and Community Development and commencement of actions for implementation.

- Research mapping public-private partnerships to inform the development of frameworks for effective co-operation is nearing completion, laying the groundwork for advancing collaborations between government and philanthropy.
- The Stimulating and Incentivising Giving Group has engaged positively with key public policy stakeholders in the fiscal space. A key takeaway is the need for a clear definition of what constitutes a "philanthropic organisation"—a critical step for shaping better fiscal supports.

- Meanwhile, the Data and Research Group is exploring ways to improve how data on philanthropy is disclosed and understood. Regulation and compliance continue to be core priorities, with ongoing collaboration with regulatory stakeholders to strengthen transparency and trust in giving practices.

This magazine is a reflection of the broad and growing ecosystem we serve. The articles and interviews here are for everyone in this space—not only donors and philanthropists, but also philanthropy advisers, wealth managers, policy makers, nonprofit leaders, grantees and grantmaking staff. No matter your role, the future of Irish philanthropy needs you. That's why we're excited to introduce our new strategic resource: *A Roadmap for the Future of Irish Philanthropy*. It lays out a bold, collaborative vision for what philanthropy can become. But a roadmap only works if we walk it together. So, I invite you—challenge you—to reflect on your part in this community. Collectively we are more. How can you use your position, your perspective, your influence, or your voice to support the growth of philanthropy in Ireland?

Let's build this future—together.

Warm regards,

Éilis Murray,
CEO, Philanthropy Ireland

PHILANTHROPY IRELAND: JOIN OUR COMMUNITY

Join Philanthropy Ireland's **vibrant community** and be a valuable contributor to shaping the **future of philanthropy**. Joining Philanthropy Ireland provides access to a range of benefits such as expertise, training and networking events, and the opportunity for peer- to-peer collaboration. By becoming a Member of Philanthropy Ireland, you can contribute to positive **change in the Irish philanthropic community**, connect with like-minded individuals and organisations, and stay informed about the latest trends in philanthropy

WHY JOIN?

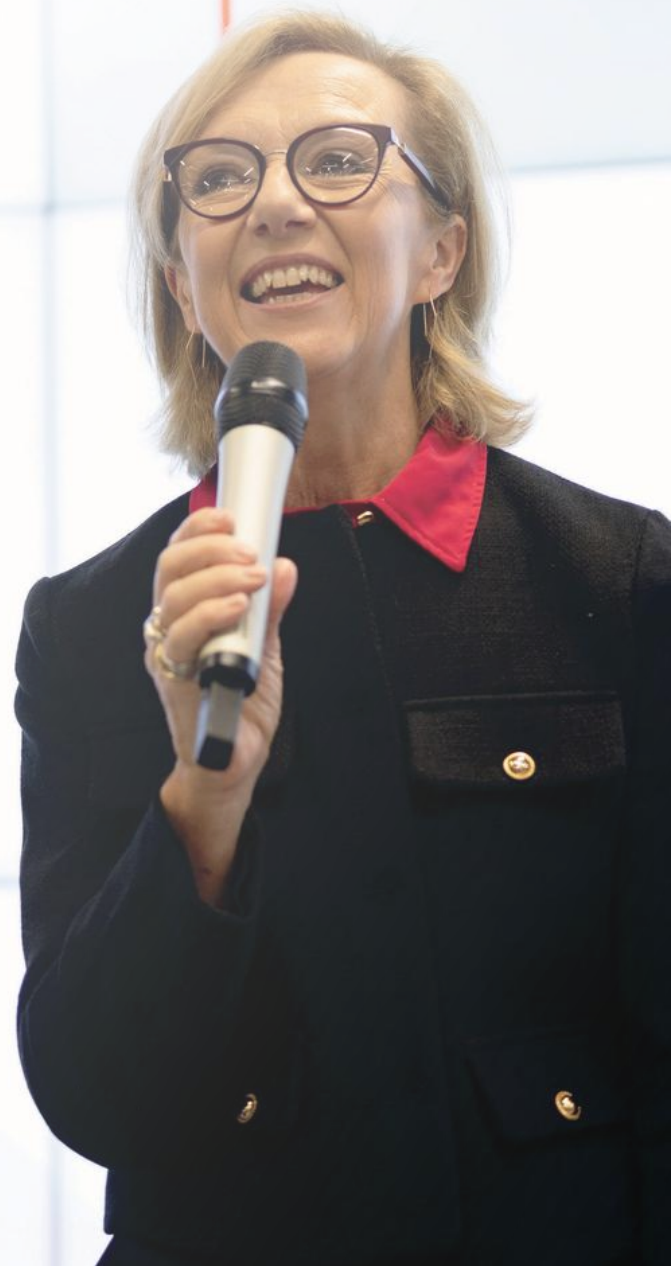
Access to **expertise, knowledge** and **insights** on philanthropy practice nationally and internationally.

Contributing to a supportive and **collective voice** to advance philanthropy.

A **trusted forum** to connect, convene and engage on philanthropy.

Collaboration and partnership opportunities with trusted relationships.

Information and knowledge sharing to deepen **understanding** and **transparency** in philanthropy.



In Conversation with Lisa Greer



Lisa Greer, Philanthropist and Author

Interviewed by Éilis Murray

Lisa, to start, philanthropy is a widely discussed term, but it often conjures different interpretations. Can you share your perspective on what philanthropy is and what you believe it should be?

Thank you, Éilis. There are two aspects to this question—what philanthropy currently is and what I believe it should be. Philanthropy can be a fraught word in different parts of the world. Some people associate it with wealth and privilege, sometimes even with arrogance. However, I see philanthropy as a way of living with purpose, a means of enabling individuals and communities to create positive change. It provides an alternative to government funding, particularly in places like the U.S. where government resources are strained. Done right, philanthropy fosters relationships rather than reinforcing power imbalances. It should be about generosity at all levels, not just the ultra-wealthy writing big checks.

That's an interesting take. In your book, you describe the moment you and your husband realised you were part of the 1%. What motivated you to start giving at the level you did?

A lot of it was driven by guilt, to be honest. But beyond that, it felt like the natural thing to do. I'm Jewish, and giving is ingrained in our culture. When

we suddenly came into wealth, our first instinct was to ask, "How can we help?" It never crossed our minds not to give. However, I later learned that many wealthy individuals don't necessarily have that same instinct. My business manager, who worked with high-net-worth individuals in the entertainment industry, told me that most of them don't give at all. That was a shocking realisation for me.



Reflecting on your philanthropic journey, what were some of your key learnings? Did you find there was a 'right' way to give?

It's been a bumpy journey. I expected philanthropy to be highly professionalised, with clear guidance, but that wasn't the case. There's no donor handbook, and I had to figure things out myself. One of my biggest lessons was understanding the hidden expectations within philanthropy. For example, when I was invited to be honored at an event, I initially thought it was a genuine honor. I didn't realise it often comes with an unspoken expectation to give a certain amount or provide a donor list. Nobody explains these things to new donors, and fundraisers often assume we already know. This lack of transparency can be frustrating and discouraging.

What experiences stand out as positive examples of donor engagement?

One of my favorite experiences was with an organisation in Los Angeles that tackled food insecurity. I approached them with a question: "How much would it cost to fill all the food banks in L.A. for three months?" Instead of jumping at the opportunity for a large gift, the executive director admitted he didn't know but promised to find out. Two weeks later, he came back and said, "The answer isn't a lump sum; it's a sustainable approach." Together, we created the 'End of the Month Club,' which still runs today. Instead of a one-time donation, we funded a staff member who mobilised the community to contribute food monthly, creating lasting impact. That kind of honest and strategic engagement builds trust and makes giving feel meaningful.

That's a great example of sustainability in philanthropy. Given your experiences, how do you feel about the availability of donor advisory support?

It's lacking. When I joined a donor-advised fund, I filled out a form specifying my areas of interest, expecting to receive personalised recommendations. That never happened. The reality is that these funds make money based on the balance in a donor's account, so there's little incentive to encourage giving. I would love to see a system where donors receive curated recommendations based on their values and interests, rather than having to navigate an overwhelming sea of nonprofits on their own.

Right Attendees at Lisa Greer's live interview, held in the LinkedIn Space on February 14th.



"I see philanthropy as a way of living with purpose, a means of enabling individuals and communities to create positive change."

Have you noticed shifts in donor behavior particularly among younger generations?

Absolutely. Younger donors want to feel connected to a cause, not just write a check. They seek purpose and meaningful engagement, but many nonprofits fail to recognise this. Traditional approaches like direct mail and gala invitations don't resonate with them. They're also often dismissed or undervalued by organisations that see them as potential connections to their parents' wealth rather than as donors in their own right. If nonprofits engaged them differently—offering genuine opportunities to contribute and participate—they would tap into an incredibly motivated donor base.

You've also been guiding your own children on their philanthropic journey. How have you approached that?

I've made it a point not to dictate what causes they should support. Instead, I encourage them to identify what they care about. When they were younger, I helped them set up donor-advised fund accounts with small balances, allowing them to explore giving in their own way. For example, when my son started a nonprofit focused on birds, I suggested he use his donor-advised funds to support it instead of asking me for donations. It's about letting them develop their own philanthropic identity rather than imposing mine.

You mentioned frustration as a key reason for writing your book. Has that frustration lessened as you've engaged more in the field?

Somewhat. I've found a community of like-minded individuals who recognise the need for change. But there's still resistance, particularly from nonprofit boards that cling to outdated fundraising models. Many fundraisers and nonprofit leaders want to innovate, but board members—often unfamiliar with modern philanthropy—are the ones saying no. We need to educate boards and leadership about shifting donor expectations and the importance of authentic relationships.

What role does networking play in engaging new donors?

It's crucial. Donors often explore causes by volunteering before they start giving. However, nonprofits frequently separate volunteers and donors into distinct categories, missing an opportunity to cultivate deeper relationships. Networking—whether through peer-to-peer engagement or facilitated introductions—helps bring more people into philanthropy. The key is to focus on relationship-building rather than just soliciting donations.

You've been vocal about the need for better donor communication. What are some major turn-offs for donors?

The biggest turn-offs include impersonal or overly aggressive solicitations, jargon-filled communication that makes donors feel ignorant, and a lack of transparency. I once received an unsolicited email that was over 1,000 words long, detailing an organisation's needs and requesting \$100,000—without even addressing me personally! That kind of approach is ineffective and off-putting.

Finally, what's your outlook on the future of philanthropy, particularly in Ireland, where the sector is still developing?

I'm incredibly optimistic. Ireland has a unique opportunity to shape its philanthropic culture without being weighed down by outdated models. There's a growing awareness of philanthropy's potential, and as long as organisations focus on relationship-building rather than transactional fundraising, the sector can thrive. The key is to remain adaptable and open to change, ensuring that philanthropy serves both donors and beneficiaries in meaningful ways.

Lisa, thank you for your insights. It's been a fascinating conversation, and I appreciate your time and generosity in sharing your experiences. ■

Changes to Charity Law: What Philanthropic Organisations Should Know

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HAYES &
CURRAN

The Charities (Amendment) Act 2024 (the 2024 Act) introduces significant changes to the governance and regulatory framework for charities in Ireland, amending the Charities Act 2009, the principal piece of legislation for charities. Some sections came into force this January, but most remain un-commenced.

While no commencement dates for the remaining sections have been designated, in addition to the changes already in force, philanthropic organisations, particularly those established as charitable foundations or charitable family trusts, should note some key reforms coming down the tracks and plan ahead. *We have set out a few of the changes below.*

Charity Trustee Definition

The definition of charity trustee includes board or governing body members but, since commencement this year, now excludes the company secretary. This is a welcome clarification. The definition is however expanded in other ways to include a shadow director/ board member, being any person in accordance with whose directions or instructions the board of the charity are accustomed to act.

- **TIP** These changes may mean that charities need to update their register of charity trustees, and all charities should keep a close eye on who truly has decision-making power.

Upcoming Requirements for Trustee Independence

Charities need to have a minimum of three charity trustees. A charitable trust may have one trustee which is a

body corporate but this in turn must have at least three directors. New rules which have yet to be commenced will provide that the majority of trustees must not be a connected relative (defined) and must be resident in Ireland, the UK or the EEA. This is intended to strengthen objectivity and align with international best practice in charity governance but will have a direct impact on certain philanthropic and family-led trusts where a majority of trustees share familial ties.

- **TIP** Charities with a majority of trustees sharing familial ties should review their trustee composition and will likely need to recruit additional trustees to ensure compliance. No imminent action is required however as the Charities Regulator has promised guidance and engagement with the charity sector before commencement of this section. This re-assurance is welcomed, particularly by such family led trusts who will need time to adjust legacy models and find suitable trustees.

Member of a Charitable Organisation – Now Defined

A definition of member has been introduced, and this provision has commenced. For charities that are companies, the members are those persons who are company members within the Companies Act 2014 definition. For charities that are not companies, the members are those with the power to appoint, nominate or vote for the appointment of a person as a charity trustee of that organisation.

The new legislation will also, in due course, require all charities,

regardless of their legal structure, to keep an internal register of members containing the name and address of each member and the date of membership. Previously, charities which were not companies were not required to do so.

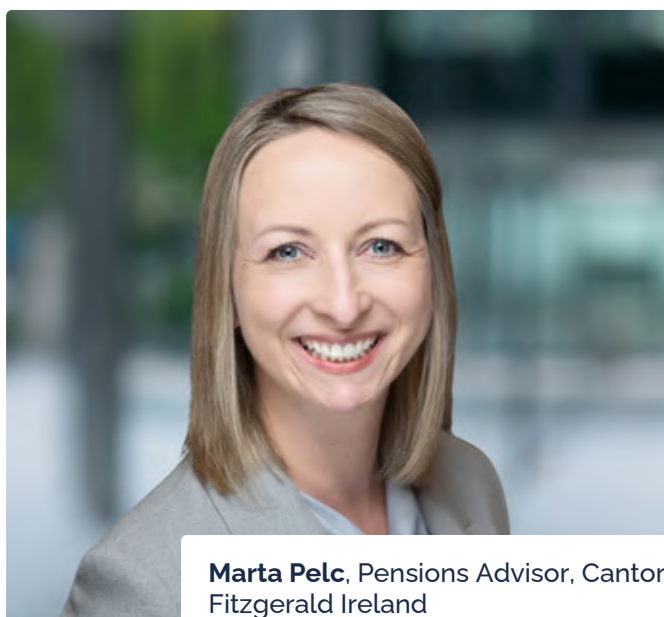
Charities should review their governing documents to check who is considered to be a member as these might include those who are simply volunteers, supporters and donors and all of these would need to be named on the register, with time. There are implications for being a member of a charity so with this in mind charities may wish to revisit, and possibly streamline, their structures.

- **TIP** Philanthropic organisations should ensure their governing documents accurately reflect these distinctions and make structural changes as required. For instance, some current members could cease their membership in exchange for becoming a 'Friend of the organisation and this tier of support could be enshrined in the constitution while reducing the membership number.

Next Steps for Philanthropic Bodies

Philanthropy Ireland members who are registered charities will need to carefully review their governance structures in light of these changes (new or upcoming). Advance planning is key. For further information and expert advice in navigating the 2024 Act please contact Niamh Callaghan, Ursula McMahon or another member of the [MHC Charity Law and Not-for-Profit team](#). ■

Preserving Your Legacy: Combining Charitable Contributions with Wealth Planning



Marta Pelc, Pensions Advisor, Cantor Fitzgerald Ireland



Charitable Gifting

Charitable giving is becoming an increasingly central focus for many people as they plan their financial futures. More than just a financial consideration, it offers a unique opportunity to support causes that reflect your personal values while also providing tangible financial and tax benefits. At Cantor Fitzgerald Ireland, we believe that giving with intention can create a meaningful legacy, one that supports both your philanthropic goals and your overall wealth strategy.

Incorporating charitable donations into your financial plan can take many forms, whether through lifetime

gifting or bequests made in your Will. Gifts made during your lifetime may offer various tax incentives, while charitable bequests are generally exempt from Capital Gains Tax (CGT) and Capital Acquisitions Tax (CAT). Strategically including these in your estate plan can reduce the taxable value of your estate, ease the financial burden on your loved ones, and ensure your generosity continues well beyond your lifetime.

To ensure these contributions are as effective as possible, it's vital to consider how they align with your broader estate and financial planning goals. Tax treatment varies based on individual circumstances and regulations, which can change over time. Seeking professional tax advice is vital, as it ensures your charitable strategy is not only compliant but tailored to achieve maximum impact and is appropriate, both for the causes you support and your personal financial situation.

Wealth Planning

While charitable gifting is a powerful tool, it works best when integrated into a comprehensive wealth plan. Financial planning can often feel complex and overwhelming, but with a clear and structured strategy, it becomes a powerful way to take control of your future. Whether you're looking to prepare for retirement, or secure your family's financial future, having a well-structured plan in place is essential. A solid financial plan not only provides clarity but also ensures that your goals are met efficiently and sustainably.

At Cantor Fitzgerald Ireland, we start the planning process by understanding your financial situation in detail. We work with you to explore and prioritize your goals, including how philanthropy fits into the bigger picture. From there, we develop actionable recommendations and guide you through the process of implementing a strategy that aligns with your aspirations. Our aim is always to simplify complex financial decisions and help you build a future that reflects your values and ambitions. >>



Left Irish Landscape with Mountains and Lake.

Find out more about Cantor [here](#).



» Keep It Relevant

As life evolves, so too should your financial plan. Whether your wealth is transitioning to the next generation or towards charitable endeavours, regular reviews are essential to keep your plan aligned with current laws, market conditions, and personal milestones. What worked five years ago may not be the best fit today.

Our proactive approach ensures your financial strategy remains flexible and future-proof. By regularly revisiting your plan, you can be confident that your wealth continues to serve a meaningful purpose, protecting your legacy, supporting your family, and making a lasting difference in the world.

At Cantor Fitzgerald Ireland, we are here to help you craft a financial journey that is not only financially sound but also rich in purpose. ■

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"...we believe that giving with intention can create a meaningful legacy, one that supports both your philanthropic goals and your overall wealth strategy."

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GET IN TOUCH

Empowering Grantmakers to Deepen Impact Through Philanthropy



Hazel Hennessy, Head of Communications and Relationships at Philanthropy Ireland

In a world facing urgent and complex social challenges, the role of philanthropy—and by extension, the impact of grantmakers—has never been more vital. As Ireland grapples with social justice issues ranging from inequality and climate resilience to digital transformation and community development, grantmakers are uniquely positioned to catalyse impactful change. But how can they do this more effectively, particularly as operational complexities grow?

Recent insights from Philanthropy Ireland's convenings, including the Grant Operations and Efficiency Workshop featuring Modern GrantMaking and the Tech to Support Grantmakers Report, provide a timely and comprehensive guide to navigating this evolving landscape. Whether you are just starting your philanthropic journey or looking to refine and deepen your grantmaking expertise, these findings offer a range of practical insights to support more impactful, equitable, and efficient funding practices.

Laying the Right Foundation for Grantmakers at the Beginning of Their Journey

Starting with a clear strategy and human-centered design can improve the process for grantmakers. Here are key early-stage takeaways:

1. *Anchor Your Grant Operations in Mission*

As emphasised through our workshop with Modern Grantmaking, successful operations must flow from your vision, not the other way around. Early-stage funders should align operational design with mission, community needs, and available staff capacity.

2. *Simplify to Amplify*

Application processes often accumulate unnecessary complexity. New grantmakers should critically assess every question asked: Is this vital for decision-making? Can forms be consolidated across programmes? As Modern GrantMaking noted, less friction for applicants often means better quality information and stronger relationships.

3. *Build Trust Through Flexibility*

Inspired by global movements like Mackenzie Scott's unrestricted, large scale giving, early-stage grantmakers should consider the transformative power of flexible funding. Unrestricted grants, whatever the scale can empower grantees to respond quickly to needs, build internal capacity, and plan long-term—all essential for social innovation.

4. *Use Technology Thoughtfully*

Starting small with digital tools—such as CRM systems, cloud-based grant platforms, and AI-powered operational tools like OtterAI or Canva—can streamline operations from day one. But avoid overengineering; instead, prioritise tools that enhance applicant experiences, internal efficiencies and align with your values and comfort level.

Deepening Practice and Operational Resilience for Seasoned Grantmakers

More experienced funders have the opportunity—and responsibility—to evolve their practice with rigor, empathy, and continuous learning.

1. *Invest in People and Multidisciplinary Teams*

High-quality grant operations depend on skilled, empowered teams. Grantmaking is a relational and multidisciplinary craft. Experienced funders should ensure their teams are trained not just in compliance, but in equitable practices, feedback loops, and impact measurement.

2. *Leverage AI and Data for Deeper Impact*

Technology is no longer optional. Philanthropy Ireland's recently launched "Tech to Support Grantmakers" report outlines AI's expanding role—from automating eligibility checks and analysing narrative reports to mapping community needs. Grant Management Systems and AI platforms can help funders make more data-driven decisions with less administrative burden. >>



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» 3. Commit to Continuous Improvement

Grant operations can stagnate over time due to organisational inertia or "process creep." Experienced funders and grantmaking teams should schedule time for operational reviews—scrapping off "barnacles" like redundant forms and processes. This might include testing new feedback mechanisms or updating grant cycles to align better with grantee capacities.

4. Support Systemic Change Through Strategic Philanthropy

Recent initiatives, such as the Social Economy for a Shared Island Report, reflections from St Stephen Green Trust Traveller Justice Initiative and the Rethink Ireland Fund Evaluation Report have called for increased strategic philanthropy to support growing social issues. This includes creating blended finance models, supporting community asset transfers, embedding sustainable practices, beneficiary centred design and co-developing cross-border initiatives. The common thread through all these findings—strategic philanthropy is about patient capital that nurtures local ecosystems for sustainable social change.

Where Philanthropy Can Lead

Across all levels of experience, the message is clear: philanthropy has a

distinct and powerful role in addressing gaps that public systems cannot fill. This includes:

- Investing in underfunded sectors like community-led regeneration, climate action, and social enterprise capacity building.
- Filling structural gaps such as Ireland's lack of an enabling philanthropic environment by advocating and championing enabling legal frameworks.
- Driving innovation through unrestricted or hybrid funding models that allow nonprofits the flexibility to grow and adapt.
- Funding Strategically through deep community listening with sustainable social change in mind.

In this regard, Irish philanthropy is poised to lead—not only by funding meaningful work but also by building more inclusive, strategic, and resilient funding systems.

Final Thoughts: Collaboration Is the New Currency

Today's most effective grantmakers are those who understand that philanthropy is not just about giving—it's about how we give. That includes building long-term relationships, leveraging technology for good, reducing administrative barriers, and

embracing new models of funding. The path to best practice is not linear, but with the right tools, feedback, and intention, Irish grantmakers can scale their impact.

As a community, our shared purpose is clear: to ensure philanthropy delivers lasting value to the communities it seeks to support.

Next Steps for Grantmakers:

- Evaluate your current tech tools and identify automation opportunities.
- Review application forms—what can be removed or simplified?
- Host listening sessions with grantees to gather operational feedback.
- Pilot a small unrestricted grant or new way of funding and track the outcomes.
- Connect with other Philanthropy Ireland members to exchange tools and learnings.
- Explore collaboration opportunities wherever you can be that with likeminded philanthropies, local or national government partnerships, research and measurement supporters or by encouraging collaboration with your grantees—philanthropy has the opportunity to lead the way in meaningful collaboration. ■

SUBSCRIBE TO OUR NEWSLETTER!



Sign up for monthly newsletters sharing events, news and information relevant to the Philanthropy Ireland Community.

STEWARDED IRISH PHILANTHROPY

A ROADMAP FOR THE FUTURE



This strategic resource is the result of deep consultation with the philanthropy community, using a futures and foresight methodology developed in collaboration with the Copenhagen Institute for Futures Studies. Philanthropy Ireland began this journey with an exploratory session at our 2024 Symposium, followed by an intensive workshop with philanthropy leaders in early 2025. The outcome is a clear, ambitious vision for the future of Irish philanthropy—and the pathways to achieve it. This roadmap captures the key highlights. The full report, with detailed insights and recommendations, is available now on our website—www.philanthropy.ie

Guiding Vision

*"From Nascent to Courageous –
Building Brave, Collaborative,
and Transformative
Philanthropy in Ireland"*



Philanthropy Ireland envisions a future where philanthropy is **transparent, strategic, inclusive, and systemic** - no longer reactive or fragmented, but an essential driver of societal transformation. This new era will be characterised by:

- **Courageous Leadership:** Embracing bold action and risk-taking to tackle root causes of inequality, climate crisis, and systemic barriers.
- **Radical Transparency:** Normalising open dialogue about wealth, power, and philanthropic impact to build trust and legitimacy.
- **Collaborative Synergy:** Deep alignment and partnerships across philanthropy, government, civil society, and business.
- **Professional Infrastructure:** Supported by enabling policies, accessible philanthropic tools, and expert advisory networks.
- **Local Roots, Global Reach:** Balancing grassroots responsiveness with global responsibility and cross-border innovation.
- **Empowered Narrative:** A cultural shift from the myth of silent charity to a vibrant story of community-powered philanthropy.

A ROADMAP FOR THE FUTURE OF IRISH PHILANTHROPY

2025–2027

PHASE



BUILD CONFIDENCE AND VISIBILITY

- Adopt and Promote a New Narrative
- Expand the Culture of Giving
- Enhance Transparency and Trust

2027 - 2030

PHASE



STRENGTHEN INFRASTRUCTURE AND CAPACITY

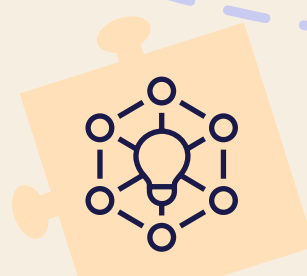
- Policy and Regulatory
- Professional Development
- Develop Collaborative



Courageous Leadership



Radical Transparency



Collaborative Synergy

2030 - 2035

PHASE



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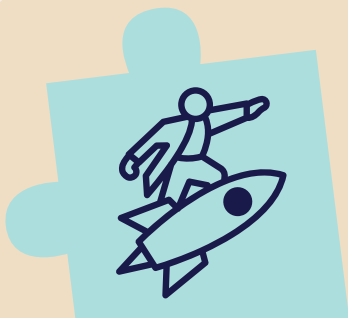
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DRIVE TRANSFORMATIVE IMPACT

- Champion Systemic Change
- Institutionalise Place-Based Philanthropy
- Advance Global Philanthropic Engagement



Professional Infrastructure



Local Roots, Global Reach



Empowered Narrative

This Roadmap is broken into three phases:

PHASE 1: BUILD CONFIDENCE AND VISIBILITY (2025–2027)

1. Adopt and Promote a New Narrative

Replace “nascent” with “courageous” philanthropy across all communications.

Launch a national storytelling campaign showcasing diverse, impactful philanthropic efforts.

2. Expand the Culture of Giving

Promote inclusive messages like “Philanthropy for Everyone” across schools, universities, and workplaces.

Encourage giving of time, knowledge, and influence—not just money.

Tap into younger generations' passion for justice and tech-savviness to develop new giving models.

3. Enhance Transparency and Trust

Partner with media to highlight success stories and philanthropic impact.

Support public-facing platforms for tracking philanthropic initiatives and fund flows.

PHASE 2: STRENGTHEN INFRASTRUCTURE AND CAPACITY (2027–2030)

1. Policy and Regulatory Reforms

Advocate for streamlined, supportive regulations and tax incentives.

Establish dedicated government units or liaisons to support philanthropic innovation.

2. Professional Development

Create training programs and certification for philanthropy advisors and nonprofit leaders.

Fund research hubs and think tanks to evaluate philanthropic outcomes and trends.

Use technology for real-time tracking of outcomes, needs forecasting, and grant effectiveness.

3. Develop Collaborative Platforms

Launch national and regional hubs for donors and nonprofits to share data, co-fund initiatives, and coordinate strategies.

Foster pooled and donor-advised fund models adapted to Irish context.

PHASE 3: DRIVE TRANSFORMATIVE IMPACT (2030–2035)

1. Champion Systemic Change

Shift funding priorities toward long-term, systemic initiatives.

Encourage multi-year commitments and unrestricted funding.

Develop rapid-response philanthropic models for emerging crises (e.g., climate disasters, pandemics).

2. Institutionalise Place-Based Philanthropy

Promote models where local philanthropists work hand-in-hand with communities to develop tailored, strategic interventions.

3. Advance Global Philanthropic Engagement

Strengthen Ireland's role in international philanthropy.

Build North-South philanthropic bridges across the island of Ireland.



SCAN HERE

To read the full report visit
www.philanthropy.ie



A New Era of Grantmaking



Fluent Technology, developers of Flexigrant, a leading grant management platform.

“We've been using Flexigrant since 2019... in 2022 we weren't using online forms—application forms were sent out in the post,... It wasn't until last year that we became fully online, and it has saved us so much time. It's been brilliant.”

- Sandra McAfee, Grants Manager at Norwich Charitable Trusts

For decades, managing grants was bogged down by paperwork, spreadsheets, and endless back-and-forth emails, draining time that could have been spent building relationships and amplifying impact. Flexigrant, developed by Fluent Technology, has changed that. With its user-friendly interface and customizable workflows, Flexigrant simplifies grant management, scaling easily whether handling a dozen applications or thousands, and offering tools for everything from online application portals and budget tables to real-time reporting and tracking. It's also the ideal upgrade for organisations already using a grant management system but wanting better functionality, smoother data migration, and excellent support.

Designed for funders awarding over £400,000 per year, Flexigrant delivers the flexibility and performance needed to streamline operations and focus on impact. “We've been using Flexigrant since

2019, and we're a group of three grant-making charities under one organisational umbrella. I joined the organisation in 2022, and at that time, we weren't using online forms—application forms were sent out in the post,” says Sandra McAfee, Grants Manager at Norwich Charitable Trusts. “When COVID came, we transitioned to emailing applications, which were then uploaded by the grant officers. It wasn't until last year that we became fully online, and it has saved us so much time. It's been brilliant.”

What is Grant Management?

Grant management is essential for private philanthropy, charities, non-profits, councils, and government bodies that distribute or receive funding for philanthropy or research initiatives. It ensures funds are used effectively by overseeing the full lifecycle—from application and allocation to monitoring and reporting.

The Importance of Grant Management Software

Managing grants manually is a complex and time-consuming process. Grant management software simplifies and streamlines this process by centralising administration and supporting smarter, faster ways of working. Key benefits include:

Efficiency and Time Savings

Grant management software simplifies key administrative tasks like application submission, budget tracking, and reporting. By moving the process online, it helps grant makers manage high volumes of applications more efficiently. Platforms like Flexigrant offer time-saving features such as reusable application templates, a question bank, automated offer letter generation, email templates, and built-in shortlisting tools—reducing manual work and accelerating the entire process. >>



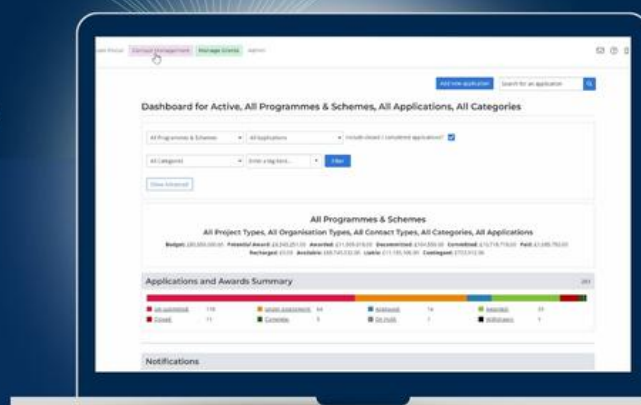
Elevate Your Grant Management

Flexigrant - the powerful, intuitive grant management platform built for today's funders. Whether you're managing a dozen applications or thousands, Flexigrant scales to fit your needs, saves valuable time, and simplifies every step of the journey.

➤ Secure cloud-based system with full data protection.

➤ Smooth transition and top-tier support.

➤ Team collaboration and document sharing.



Discover the future of Grant Management today.



More Information
www.flexigrant.com



Contact Us
info@fluenttechnology.com

Find out more about Flexigrant [here](#).



➤ Enhanced Collaboration

The centralisation provided by Flexigrant improves collaboration among team members – and between internal and external stakeholders. From enhancing communication to enabling convenient document sharing, it ensures that everyone has access to the most up-to-date information, and can work together more effectively.

Better Decision Making

With Flexigrant's data reporting options, organisations can easily access and analyse information related to their grant-funded projects. These tools provide valuable visibility into project performance and financial management, supporting better decision-making and more effective resource allocation in the future.

Choosing the Right Grant Management Software Provider

As more organisations turn to digital solutions like Flexigrant, selecting the right platform becomes mission-critical. Here are five essential qualities to look for when evaluating your options:

Functionality That Delivers

Your software should cover the entire grant lifecycle—from application to reporting. Robust features like scoring, workflow tracking, and budget management are must-haves to support efficient and transparent processes.

Intuitive User Experience

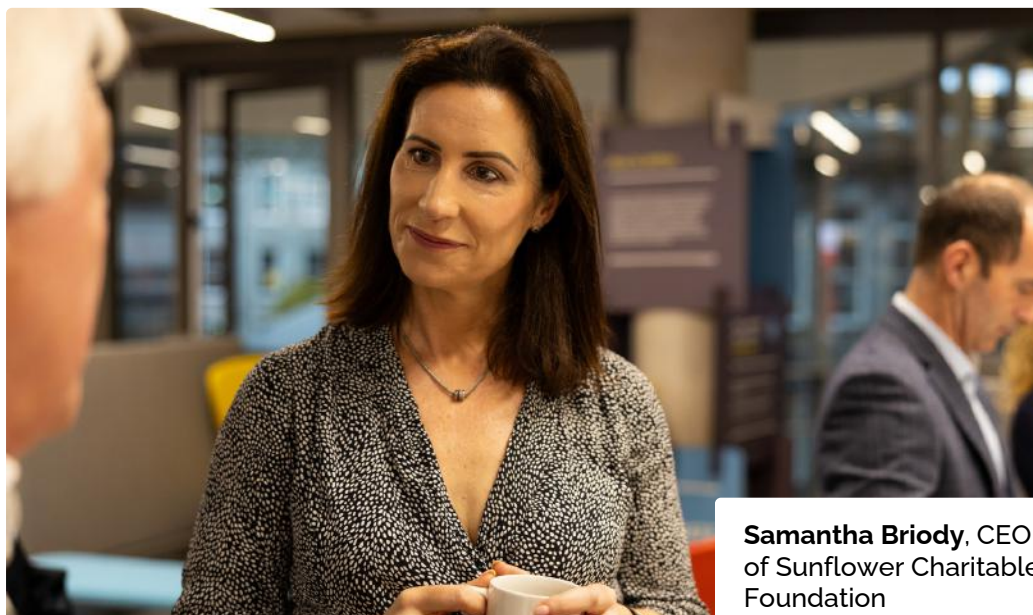
No one wants to wrestle with clunky software. Look for a platform with a clean interface, simple navigation, and visual dashboards that make critical data easy to access and interpret.

Support You Can Count On

A great provider goes beyond the tech. "Brilliant support – timely and accurate advice. Thank you" – Grants Support Officer, Local Authority. Look for providers offering comprehensive onboarding, training, and a peer user community; like the Flexigrant Community—are vital for long-term success.

Effective grant management empowers funders to direct resources more efficiently by cutting down on administrative burden. Features like reusable application templates, integrated financial tools, and secure cloud storage all contribute to smoother operations. ■

In Conversation with Samantha Briody



Samantha Briody, CEO
of Sunflower Charitable
Foundation

What drew you into the world of philanthropy?

I've had a very diverse career spanning banking, property, and financial management, but what struck me first about the 'not-for-profit' sector was the incredible enthusiasm and passion of the people involved. I was attending a charity law certificate program, and it immediately felt different from any other professional training I'd experienced. I'm not sure if you've been in any breakout rooms full of accountants, but they wouldn't tend to be the most energetic places!

The commitment, energy and engagement was obvious from the very first breakout room. I felt energised and I knew I wanted to spend more time working in this space.

What drew me further into philanthropy was, again, the people. Their values, their vision, and their belief in what could be achieved was incredible. Working in this space gives me a sense of fulfilment I didn't always find in the corporate world. It's incredibly rewarding to know that you're part of something bigger and making a difference.

How has your background in finance prepared you for philanthropic leadership?

I've been lucky to work across multiple sectors and gain lots of experience in lots of different areas and this role requires exactly that – the ability to turn your hand to multiple different challenges, you really need a comprehensive skill set. You're constantly adapting, solving problems, and bringing together multiple perspectives. There is a pressure to make the right decisions, to support the right projects, to find the right programs. And in some cases, there's a real sense of urgency. So, while you're not looking at the same types of deadlines, there is that -I suppose- onus to create impact and work hard because you know the difference your work can make.

What would you say are the most important factors to bear in mind when working with and advising philanthropists and family foundations?

Trust plays a fundamental role here. In my previous work, trust was often the

final step after examining figures and facts. In philanthropy, trust is at the foundation of everything. That trust extends to their advisors, their partners, the grantees, building a relationship and a connection is just so, so important.

The other thing I really notice are values. For most corporates you'll see a mission statement, maybe on a website, but in philanthropy, it's more than that. Those values flow through everything the philanthropist does. It's more than just words on a website or on a piece of paper, it's fundamental to everything that's done and every interaction.

Finally, family foundations bring so many experiences and backgrounds to the table. When you have a strong board, with different types of backgrounds and variations in age and insights, you think broader, you think outside the box, because you're not getting the same voices, you're getting such a variety and each voice is important. >>

"In philanthropy, trust is at the foundation of everything."

» This is probably one of the aspects to being involved with a family foundation that I have enjoyed most.

What advice would you give to professional advisors about supporting potential philanthropists?

Listen. Really listen. Allow the conversation to flow and create a safe, relaxed space where philanthropists can express what truly matters to them. Allow the individual the opportunity to speak and to express their reasons for giving and what they want to focus on. Because I think when you allow them to do that, and then you support them and guide them, the grantmaking process and everything else becomes easier. If the advisor does not hear what the philanthropist is really passionate about, unfortunately, the philanthropy may not happen. Your role is to guide and support, not to impose your own views. Many advisors rush to solutions without understanding the individual's passion.

“Allow the conversation to flow and create a safe, relaxed space where philanthropists can express what truly matters to them.”

How would you advise philanthropists on how to start the conversation or get the ball rolling on their own philanthropy journey?

There are different routes, if you are just starting out take time to speak with the right people. If you're at the stage where you are thinking about setting up a foundation, or you are looking to do a large amount of grantmaking, finding the right partners to support you on your philanthropy journey is really important.

Take the time to create a strategy. In my experience when philanthropists themselves take the time to figure out what key areas and types of organisations they want to support, and map that piece out, it makes the process easier and less intimidating.

“...if there's a spark of interest in philanthropy, you need to grasp it before the individual moves on to something else.”

How can philanthropy become more accessible in Ireland?

We need better infrastructure and clearer pathways to make giving easier. In my experience when individuals are speaking with their financial advisors, the last thing on the agenda would be philanthropy, because you're not in there for that kind of a conversation. You're in there to get sign off on accounts, get tax advice, look at the value of your investments. You're looking at so many other things, and philanthropy is rarely an agenda item or the focus of a meeting.

So, there is a need for advisers to understand the philanthropic landscape, that landscape is complicated and ever changing but if understood, it would allow more money to reach the charities that need it, because if there's a spark of interest in philanthropy, you need to grasp it before the individual moves on to something else. Organisations like Philanthropy Ireland and Community Foundation Ireland are crucial in making philanthropy easier and less intimidating. They are about creating simple routes for people to give, respecting their privacy, and showing the real impact of their contributions.



What would you tell grantees about building relationships with foundations?

Communication is key. A simple thank you goes a long way. When you receive a grant, provide updates, share impact stories. Foundations invest significant time in understanding the issues, reviewing organisations and selecting projects – we want to feel connected to the journey. It's not just about money; it's about being a partner in creating change.

What's your perspective on community building in the philanthropy sector?

It's transformative. Unlike traditional networking, which feels like a chore, philanthropy networking feels genuine. Personally, it has been incredibly important having partners, strong partners, partners we trust. And

that's not just in terms of the grantees, because we often refer to them as partners, but also the likes of Philanthropy Ireland and other foundations in the membership, they are invaluable in terms of the support. It's funny at every one of the events that I've attended, I've had a conversation with somebody who's facing similar challenges or facing a similar issue that we're facing. It's so lovely to have that conversation and kind of go, oh, this is how you managed it. I have found, without fail, people are very eager. There's an openness and eagerness to collaborate that's unique to this sector.

What's the most important thing the philanthropy sector needs right now?

Collaboration. We have incredible organisations, experienced foundations, and passionate individuals. I see huge opportunities

for family foundations to work with each other to get projects off the

Any final words of wisdom?

Trust and accountability are everything. Listen deeply to what philanthropists truly want to achieve. Make giving simple, transparent, and meaningful and remembering, it's not all about the money – it's about building lasting relationships built on trust. ■

Samantha Briody brings a refreshing blend of financial acumen and heartfelt commitment to philanthropy. Her journey demonstrates that effective giving is about understanding, connection, and shared passion for creating positive change.

PHILANTHROPY SYMPOSIUM

Save Your Space Now!

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The annual **Philanthropy Symposium**, now in its **9th year**, is a celebration of Irish Philanthropy and a **catalysing force for change within the philanthropy community**. This annual event is for members of Philanthropy Ireland, members of the wider philanthropy sector and policy makers looking to support this sector.



Building Better Relationships: How Funders Can Support Charities More Effectively



Mark Hughes, Director of
Communications & Membership with
Charities Institute Ireland



In the world of philanthropy, funding is about more than just writing a cheque. It is about building relationships that empower charities to do what they do best – serve communities and drive meaningful impact. In Ireland, where charities play an essential role in social cohesion, collaboration between funders and non-profits is crucial. Yet, many charities still find the funding process opaque, overly complex and at times discouraging.

So, what can funders do to strengthen relationships, simplify processes and make a greater impact? Here are some key insights from the charity sector.

1. Move Beyond Transactional Giving

Many charities experience a funding treadmill, constantly applying for short-term grants with little certainty for the future. This cycle creates instability and prevents long-term planning. Instead, funders should consider:

- *Multi-year funding*: Providing longer-term financial commitments gives charities the stability to plan, innovate and deliver sustainable impact.
- *Flexible funding*: Unrestricted or core funding allows charities to allocate resources where they are needed most rather than being tied to rigid project-based grants. A great example of this is The Heart of the Community Fund from The Ireland Funds. This open grant round is designed to support not-for-profit organisations across Ireland by providing Organisational Investment Grants. Recognising the challenges charities face in securing funding for capacity building or core costs, the fund allows organisations to allocate the funding to their most pressing needs, ensuring they can continue delivering on their mission effectively.
- *Investing in capacity building*: Supporting governance, training, digital infrastructure and operational needs strengthens the entire sector.

"By providing unrestricted grants through our Heart of the Community Fund, The Ireland Funds aims to give organisations the stability and flexibility to plan for the future, invest in their capacity, and continue delivering meaningful impact in communities across the island of Ireland."

- Siobhán Gallagher, Executive
Director, The Ireland Funds

2. Streamline Grant Applications and Reporting

For many charities, the grant application process can be overly complicated, requiring significant time and resources – time that could otherwise be spent on



Left The Ireland Funds, Heart of the Community Fund.

service delivery. Funders can help by:

- *Simplifying application forms:* Keep them concise and only ask for essential information.
- *Aligning requirements:* Funders could work together to standardise reporting expectations, reducing duplication.
- *Trusting charities:* Move away from excessive paperwork and embrace lighter-touch reporting, focusing on meaningful impact rather than bureaucracy.

3. Foster Open and Honest Communication

The best funding relationships are built on trust and mutual respect. Too often, charities feel pressure to present themselves in a way that aligns with funders' expectations rather than being transparent about their challenges. Funders can help by:

- *Encouraging honest dialogue:* Create a culture where charities can share challenges without fear of losing funding.
- *Offering feedback:* Constructive feedback on applications can be invaluable, particularly for smaller charities that may not have dedicated fundraising staff.
- *Being accessible:* Make it easy for charities to reach out, ask questions and discuss potential funding opportunities.

4. Recognise the Importance of Relationships

Strong relationships between funders and charities do not just happen – they require investment on both sides. Funders can take proactive steps to build trust and collaboration by:

- *Meeting charities where they are:* Visiting projects and engaging with communities helps funders understand the real-world impact of their support.
- *Facilitating networking:* Connecting grantees with other charities, businesses or policymakers can amplify impact beyond financial support.
- *Listening to those on the ground:* Charities and the communities they serve often have the best insights into what works – funders should seek to learn from them.
- *Sharing knowledge and learning:* Charities can gain a great deal from experienced funders who have seen what works across a variety of contexts. Funders can help by sharing lessons from successful projects and highlighting effective approaches that have delivered strong outcomes elsewhere. When both sides are open to learning, the results are often more impactful and sustainable.

Key Takeaways for Funders:

- Offer multi-year and flexible funding to provide stability and empower charities.
- Simplify grant applications and reporting to reduce administrative burdens.
- Foster open and honest communication to build trust and collaboration.
- Engage with charities beyond funding – visit projects, listen and facilitate connections.

At Charities Institute Ireland, we see firsthand the dedication of non-profits working tirelessly to serve their communities. When funders and charities work together in true partnership, the impact is amplified. By making funding relationships more transparent, flexible and supportive, funders can enable the sector to thrive and ultimately create a stronger, more inclusive Ireland for all. ■

Corporate Philanthropy: A Future-Focused Strategy that Works for Everyone



Above TU Dublin TrailblazHER Programme.

“Companies partnering with TrailblazHER™ doesn't just make ethical or moral sense, it also makes good business sense.”

Corporate philanthropy has evolved. No longer confined to writing cheques or one-off sponsorships, today's most impactful initiatives align with core business objectives while delivering measurable social value. This isn't just about doing good—it's about doing well by doing good. Two powerful examples from Philanthropy Ireland's membership—TU Dublin's TrailblazHER initiative, involving multiple corporate partners and Philanthropy Ireland's recent case study with Bank of America on their role in supporting young people from marginalised communities to explore technology and innovation employment—highlight how corporate giving can be strategic, collaborative, and future-focused.

TrailblazHER: Building Equity Through Collaboration

TrailblazHER™ is a community of stakeholders working together to advance gender representation and equality. Launched on International Women's Day 2024, this community, led by Technological University Dublin, supports women with the unique challenges they face as job seekers, job creators and leaders. They do this by

delivering a range of experiences and supports for women from the (second level) classroom, through to the boardroom, with tailored supports at each stage.

For young women in second level education TrailblazHER™ offers experiential school programmes that encourage them to explore the world of careers, digital campaigns featuring relatable role models across a wide variety of disciplines, and scholarships to help increase female participation in areas where females are currently underrepresented.

Supporting Gender Equity for the Workforce of Tomorrow

Claire Mac Namee, Director of TrailblazHER™, told Philanthropy Ireland: “Research shows that early gender role conditioning profoundly shapes our educational and career choices, often steering us towards paths aligned with societal expectations rather than personal interests or abilities. TrailblazHER™ is designed to counteract these influences by increasing young women's exposure to a broad range of opportunities beyond education.”

For women studying at TU Dublin, TrailblazHER™ supports them to develop personal career roadmaps to ensure that as they advance from the University they are empowered, networked and have a gameplan. The flagship 'Be A TrailblazHER' Programme, is a key way this is delivered.

Building Community Through Partnership

Partnering with companies to build this community has been key. The TU Dublin Foundation supported TrailblazHER™ with a fundraising campaign which to date has delivered €1.3m of the initiatives €2m fundraising target.

Discussing the impact of TrailblazHER's partnerships, Mac Namee emphasised that it's not just about financial support. "Our partner companies have identified TrailblazHER™ Champions from their staff who are actively mentoring students, sharing their experiences, and bringing industry knowledge to help shape the next generation of talent. They are hugely aligned with our purpose and mission and contribute to the community in many ways."

Supporters of TrailblazHER™ include founding donor Intel, along with ESB, Fidelity Investments, Jones Engineering, PwC, Workday and Enterprise Mobility.

"Companies partnering with TrailblazHER™ doesn't just make ethical or moral sense, it also makes good business sense". Mac Namee highlighted that diversity and belonging benefit all stakeholders, regardless of the industry. "Gender-diverse companies often outperform their less diverse counterparts," she noted. "A McKinsey report found that companies in the top quartile for gender diversity were 21% more likely to have above-average profitability."

Find out more information on the TrailblazHER initiative [here](#).



Read the full Bank of America case study [here](#).



The collective efforts of all TrailblazHER™ stakeholders have enabled the community to accelerate a powerful range of impacts since its inception, including:

- Sponsoring secondary students to present at the **International Space Development Conference** in Los Angeles
- Hosting the first **TY TrailblazHER Awards** for transition year students
- Developing and launching the **Be A TrailblazHER Programme** for university students at TU Dublin
- Launching an industry **mentoring** programme
- Developing a women-led business programme: **TrailblazHER First Steps**



Above Ursula Mapley, Fernando Vicario, Éilis Murray and Andrea Sullivan at the Bank of America Roundtable Discussion in September 2024.

Bank of America: A Broader View of Impact

Bank of America's work in Ireland offers another example of future-focused philanthropy. As featured in a recent case study by Philanthropy Ireland, the company has embedded social investment into its business strategy, with an emphasis on increasing access to education and economic opportunity for underrepresented groups.

Through partnerships with local organisations, Bank of America supports programmes that not only tackle inequality but also prepare diverse communities to enter the workforce. This is philanthropy that mirrors the company's own long-term goals: creating inclusive growth and sustaining a diverse talent pipeline.

Aligning Purpose with Performance

What both TrailblazHER and Bank of America exemplify is a shift in how we think about corporate giving. This isn't about separating business goals from charitable activities. Instead, it's about aligning them—creating partnerships that generate shared value. When companies invest in education, equity, and opportunity, they aren't just giving back—they're building forward. The return? A stronger talent pool, a more resilient brand, and an organisation that lives its values in action.

This approach is gaining momentum across Ireland. It reflects a growing understanding that the best corporate philanthropy is not about detached generosity—it's about strategic alignment. For corporates, the message is clear: your philanthropy doesn't need to sit apart from your business. It can—and should—be part of your growth strategy. And as these examples show, it can be a win for everyone. ■



PHILANTHROPY IRELAND BUSINESS WITH PURPOSE: AMPLIFY YOUR IMPACT



Join a vibrant **community** of corporate leaders committed to creating meaningful and lasting change across Ireland. Philanthropy Ireland **connects** your organisation with like-minded peers, offering opportunities to **amplify your social impact** through collaborative efforts, shared expertise, and strategic initiatives.



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Thank you to our inspirational philanthropy community
including our members and partners



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