Stanford PACS
Center on Philanthropy
and Civil Society

Effective Philanthropy Learning Initiative

RESEARCH

DESIGNING FOR PHILANTHROPY IMPACT: THE GIVING COMPASS

Stanford Center on Philanthropy and Civil Society,
Effective Philanthropy Learning Initiative

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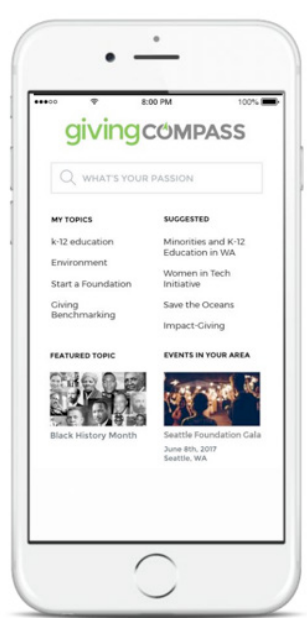
EXECUTIVE SUMMARY

High net worth (HNW) donors wishing to manage their own philanthropic work must navigate a disorganized maze of online resources. Based on its initial research, the Effective Philanthropy Learning Initiative (EPLI) at Stanford Center on Philanthropy and Civil Society hypothesized that high net worth donors will learn faster and be more likely to implement an impactful philanthropy strategy if provided with a centralized, user-friendly platform of tools and resources. EPLI then tested this hypothesis with additional research from January to August 2016.[1]

After completing interviews with 51 high net worth donors and 29 domain experts, EPLI created a prototype of an online platform, titled the Giving Compass. The EPLI tested the platform designs with individual donors, and continuously revised the designs based on their feedback. Informed by this and other research, the Raikes Foundation launched the Giving Compass™ in Summer 2017 (visuals below), in partnership with EPLI and several allied organizations.

This paper summarizes EPLI findings about specific needs of early-stage high net worth donors.[2] It also outlines key insights from the research and resulting design principles for creating useful products for the sector.



THE EFFECTIVE PHILANTHROPY LEARNING INITIATIVE AT STANFORD PACS

Stanford University's Center on Philanthropy and Civil Society established the Effective Philanthropy Learning Initiative (EPLI) in November 2015, with a generous grant from the Raikes Foundation. The Initiative's mission is to understand the needs of high net worth (HNW) philanthropists who wish to have impact in addressing societal problems and develop ways to address them. The Initiative defines HNW donors as donating six figures annually to philanthropic causes. The Initiative employs a combination of behavioral science, systems mapping, and methodologies associated with the practice of human-centered design.[3]

In pursuit of its guiding question, *How might we help HNW donors increase their philanthropic impact?*, the Initiative observes and conducts in-depth interviews of HNW donors and examines the broader philanthropic ecosystem, including organizations, resources, and tools. We seek to understand these individuals' behavior, discover their unmet needs, and then design and develop resources to address them. The knowledge and resources the Initiative develops are freely available to philanthropists, donor education organizations, wealth advisors, philanthropic advisors, scholars and students, and the public at large.

GIVING COMPASS RESEARCH

OVERVIEW

Stanford's Effective Philanthropy Learning Initiative (EPLI) focuses on high net worth (HNW) donors who wish to maximize the impact of their philanthropy. A specific subset of these donors are *do it yourself* (DIY) philanthropists—typically, successful professionals who wish to be personally engaged in their philanthropy. Many DIY donors are relative newcomers to the field, and are confronted with an array of resources that appear scattered, confusing, and unreliable.

Our research identified a gap between what new HNW donors hope to find online and the resources actually available to them. Existing resources that support impact-driven philanthropy tend to be text-heavy and poorly designed, and are often buried within the websites of institutions that are not known to the donors. Access to some online resources also requires paying a fee. Even the most highly motivated donors find it difficult to navigate this complex and disorganized landscape.

By lowering barriers to search and providing reliable, user-centered resources and tools, EPLI believes that it is possible to help donors implement a philanthropy strategy with real impact.

This paper outlines the research that drew upon human-centered design methods to identify DIY donors' needs and insights. The paper presents prototypes of online tools that were developed and tested with this donor population in mind.

GIVING COMPASS RESEARCH

APPROACH

Over the course of our research, EPLI interviewed 51 HNW donors, with particular attention to individuals who expressed interest in increasing their philanthropic impact. Many of those interviewed had not participated in a donor education program. The first round of interviews were open-ended ethnographic interviews aimed at identifying donor needs. In the second round of interviews, the EPLI research team presented donors with a giving compass prototype, and the team documented the donors' feedback and reactions. The team revised the prototypes based on the feedback.

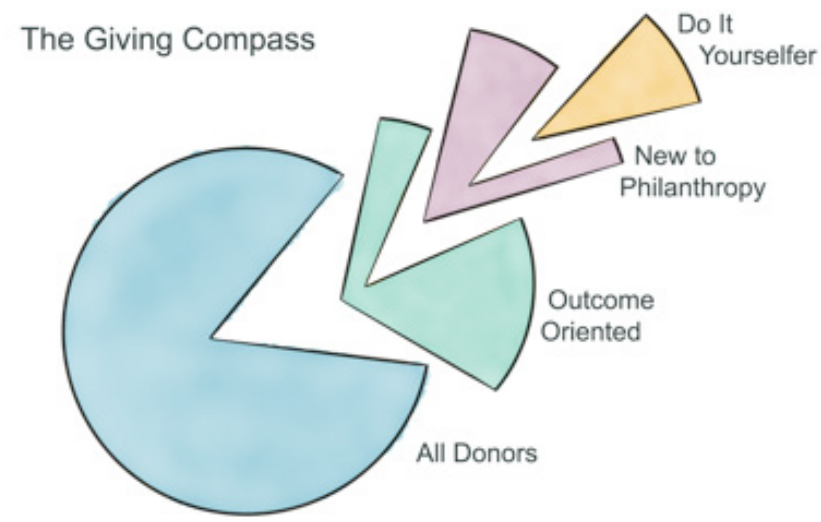
The Initiative also interviewed 29 domain experts, leaders of donor education groups, and other relevant stakeholders, including leaders at organizations such as Philanthropy Workshop, Social Venture Partners, Silicon Valley Social Venture Fund, Fidelity Charitable, GuideStar, Center for High Impact Philanthropy, Foundation Source, and Rockefeller Philanthropy Advisors (see Appendix A for a full list of interviewed experts). Based on this work, we created a landscape map of the service providers,as well as a catalog of existing philanthropy education resources and tools.[4]

DONOR PROFILES AND ARCHETYPES

NEW PHILANTHROPISTS WHO ARE INDEPENDENT AND OUTCOME-ORIENTED

During the initial research phase, EPLI developed a taxonomy of behavioral profiles,which can be found in the "Design Thinking and Strategic Philanthropy Case Study."[5] One of our behavioral profiles focuses on outcome-oriented donors, early in their philanthropic journeys, whom we call *do it yourselfers* (DIYs). Not to be confused with the occasional weekend hobbyist, these individuals are worldly, successful, and sophisticated—just inexperienced at philanthropy.

DIY philanthropists actively research ways to improve their practices and assess their outcomes. As a group, they tend to be intellectually curious, voracious consumers of knowledge, and are motivated by the challenge of solving complex social issues. Many of them are experienced professionals, and have cultivated a habit of learning by creating or building solutions themselves. They are entrepreneurial and independent-minded, and do not want to outsource their decision making. But they also know when to ask for help.



According to Camber Collective's "Money for Good" report, 38% of philanthropists research at least one donation per year, 33% research performance of nonprofits, and barely 9% attempt to compare organizations conducting the same type of work.[6] Our DIY interviewees are among the 33% of donors who research nonprofits and their performance, but they often struggle to find resources that meet their needs and are unsure about where to look. They are wary of sources that appear to offer services as a business opportunity. They want to learn from the successes and failures of other philanthropists to improve their own decision-making processes.

DONOR PROFILE: *Sarah*

Sarah is a successful engineer and entrepreneur. She is married with two children and recently sold her company, which has allowed her to invest more energy in her family's philanthropy. Her philanthropy had been largely reactive to requests that have come to her and her husband. The family is interested in taking greater initiative, and becoming more proactive with their philanthropy. Two months prior to our interview, Sarah joined a donor education circle and set up a family foundation. She and her family are not consulting with outside experts because she said, "[we] want to make our own educated decisions. … We are trying to collect as much information as possible in order to establish a baseline for ourselves."

Sarah spent several months conducting research on philanthropy, and philanthropic practices. She read Paul Brest's and Hal Harvey's book *Money Well Spent*; participated in a Giving 2.0 MOOC; and consulted Charity Navigator, GuideStar, and several other online resources. She subscribed to the *Stanford Social Innovation Review,* and looked at the Council on Foundations' Family Foundation resources. But she has not yet paid for any online resources: "I'm still trying to figure out what resources we should invest in to help our education. I like recommendations from people I trust. I don't have enough of that network." This reluctance to pay for resources was common across our donor interviews.

At this early stage, Sarah is still trying to take it all in, to understand the landscape of philanthropy, and to develop a perspective. She hopes to find a general forum that would allow her to talk to people who have done this before, and states "It would have been great to talk to a neutral expert when we were setting up the foundation."

DONOR PROFILE: *Chris*

Chris is a millennial who is an international NGO founder and leader, and an active filmmaker. Recently, his parents established a private foundation where, previously, they gave by writing checks. Their giving interests focus on the arts, education, and needs in their geographic area. Chris and his sibling now have the opportunity, and the interest, to steer their parents' giving to be more strategic and focused, but they are not sure of next steps. He did not feel as though he could talk with others about philanthropy because "it's sensitive" and he wants to protect his family's privacy. Yet he wanted to connect with a network of young philanthropists who are in a position similar to his. At Stanford, he audited Paul Brest's "Strategic Philanthropy" class, where he began to develop a network that proved relevant to his foundation. Chris concluded that sometimes all a philanthropist needs is a strong connection to another effective giver to be able to start the process of effective giving.

Chris feels the need for a community of young, like-minded HNW philanthropists rather than continuing to rely upon the well-intentioned advice of his friends. Also, he wants to engage directly with local communities in order to understand their needs, and to address their problems in a systematic rather than ad hoc fashion. Chris conveyed a deep sense of responsibility both for his family and for the communities he hopes to serve, and wants access to in-person and online resources that will help him direct the activities of the foundation in the most effective possible way.

OBSERVATIONS AND DISCUSSION

Based on donor and expert interviews, and after testing our EPLI prototype (see page 29 for visuals of our prototype), the EPLI team made the following observations.

THE DONOR EXPERIENCE

› The philanthropy learning journey can be very isolating and lonely

Individuals frequently commented on feeling isolated when working on their philanthropy. Many interviewed felt uncomfortable speaking about their philanthropy with their peers, afraid to come across as boastful or putting pressure on their peers to be as philanthropic. They also did not want to share all that they did not know about philanthropy. They expressed a desire to find others like themselves who were in the same situation and exploring similar questions.

> *"Very few universes are as lonely as philanthropy. Everyone assumes you can find everything."*

› New donors are unfamiliar with the language, concepts, and experts in the philanthropy sector

For individuals who have not worked in the nonprofit sector, there is a steep learning curve in understanding the terminology, organizational structures, and methodologies used in the philanthropy sector. Many beginning philanthropists articulated difficulty understanding the basics and exploring this sector, whether in person or online.

Most donors could not identify philanthropy experts to turn to. They wanted assistance in identifying whom to follow and learn from.

> *"When I began, I attended a National Center on Family Philanthropy conference; it introduced me to philanthropy. I knew the words all meant something, but I was struggling to figure out what they meant."*

> *"Feels like starting at zero. I didn't know where to begin. First step, I went to Charity Navigator. It was not very helpful for deciding how to start. I struggle understanding the space."*

"I don't know who to follow or who are the well-known experts in this field."

"I haven't found any resources that have been helpful to me."

› Five recurring philanthropy-related questions that arise during the early stages of a DIY philanthropist's journey

Focus: *On what issues should I focus?*

Many philanthropists starting out on their journey are still unclear about their personal passions or interests, and unsure of how to go about determining them and narrowing their focus. Additionally, many would like to understand the areas of greatest need, both in their home communities and around the world.

Vehicle: *How do I select the appropriate giving vehicle?*

Early-stage donors are often trying to determine a giving vehicle that is effective, flexible, and tax-advantaged. They are typically comparing writing checks with creating a donor advised fund, a foundation, or an LLC.

Strategy: *Should I develop a philanthropic strategy and how should I go about it?*

They often believe that they need to develop a philanthropic strategy, but are not sure why, how or where to start. They want to receive expert guidance and examples of how to do this well.

Implementation: *How do I implement my grants and gifts effectively?*

Philanthropists have questions about the best way to source, review, make, and manage grants. Learning how to evaluate a nonprofit organization's impact is not self-explanatory. Donors struggle with what data they should be collecting, and where they should be looking for information regarding a nonprofit organization's impact. They also don't know whether they should be comparing the organization's performance to a particular benchmark. They are continually asking, *"How do I know if a nonprofit is effective?"*

Community: *Where can I learn with others?*

Philanthropists often hope to find a community of fellow donors. They want to see what others are doing and learn from their successes and failures. New philanthropists are not aware about donor education courses or

programs in their area, and often find out about them through word of mouth. They repeatedly asked where they could learn with others. Even those with some donor education experience wanted more education experiences, and specifically with new communities and within their specific areas of interest. We also learned that donors wanted to be able to search for events and communities in their geographic area, and want to see a calendar of events on effective philanthropy happening around the country.

› **Donors want resources and recommendations from a neutral, trusted, expert source.**

DIYers are often doubtful of information and are wary of resources that point to a financial transaction. They are looking for accessible tools informed by a neutral and reliable source that could make clear recommendations. They also desire clarity and transparency about a resource's point of view. For example, are the website curators setting the standard on effective philanthropy, or promoting specific philanthropic goals, as the "effective altruism"[7] movement does?

"I like recommendations from people I trust. I don't have enough of that network."

› **Philanthropy related resources need to be relevant, targeted, and practical.**

Donors want to know "what works and what doesn't work" in their philanthropy practice. They are not looking for a set of instructions as much as balanced and objective reports from the field.

Philanthropists asked for resources that could help them make real-world decisions that are applicable to their situation and stage in philanthropy. They believe that much of the information online about effective philanthropy is targeted at program officers at large foundations. HNW donors are asking similar questions, but are looking for resources targeted at their experience.

DIY philanthropists are interested in learning about the failures, successes, decision-making structures, templates, landscapes, and evaluation and grantmaking methods of professional grantmakers and individuals like them. They want to be able to learn from multiple examples and perspectives and select the ones that feel like the best fit for their philanthropy goals.

"I want to look behind the curtain of foundations and obtain templates"

"How do you get access to information these larger foundations have?"

"Am I really going to be able to implement? Is it a formula for a foundation, or is it targeted at me?"

› Donors want to learn from peers in a neutral/safe space:

DIY philanthropists often seek advice and examples, but have varying levels of comfort talking with friends and peers who might not know (and might not want others to know) their giving capacity or specific outcome goals.

Some donors favored materials suggested by experts, others wanted to see top user-ranked resources (such as books, articles, education programs, and online services), or the resources that were used the most frequently by other donors.

"Would love a more general forum to talk to people who have done this before."

"I don't have a lot of people to talk to about this. I'm by myself trying to figure this out."

"Would've been great if there were a way to network with other high net worth people who have limited."

› Free vs. paid

Donors have varied attitudes about paying for advisory services. Some users said they would be willing to pay for a highly curated and trusted resource. Others felt the resource should be offered for free since there are already existing free online resources.

"I would be much less likely to engage with it if there was a fee. I know sometimes fees are there to convince me that the stuff is high quality and worth buying in, but there are free webinars and resources for family philanthropy out there. ... I would think, 'Why should I pay for this if there is other free stuff out there?'"

EXISTING PHILANTHROPY EDUCATION RESOURCE

› **Some good online philanthropy resources exist, but they are difficult to find.**

Our EPLI team compiled a library of approximately 500 articles, websites, blogs, podcasts, videos, books, guides, educational programs, meetings, and conferences dedicated to effective philanthropy. Some good resources on effective philanthropy exist, but they are difficult to find, and are often cluttered with material that may not be useful or relevant.

› **Existing donor philanthropy education resources responding to the five recurring questions**

Focus: *On what issues should I focus?*

To help donors discover their individual passions, we learned that people wanted an interactive experience for refining their focus, which EPLI is currently developing.

Vehicle: *How do I select the appropriate giving vehicle?*

While giving vehicle tables exist, we did not find any interactive, easy-to-use resources regarding giving vehicles. Most tables are very text heavy and can be overwhelming to new donors. We concluded that it would be helpful to create user-friendly tools around the topic of vehicles by looking at existing documents. A next step could be to digitize the materials and offer them through an interactive tool.

Strategy: *Should I develop a philanthropic strategy and how should I go about it?*

We did not find any good interactive online strategy course. While users were interested in understanding what an effective strategy looks like, the design and presentation of a strategy tool (see page 41) left users feeling overwhelmed and made this step feel like "work." Some wanted to see a real person's exemplary strategy in order to build their own. Others suggested we "gamify" the exercise so it doesn't feel like work. We wonder whether a softer entry point into strategy, and possibly avoiding that daunting word, might improve the user experience and possibly increase the use of the tool. Following the completion of this research project, EPLI built an automated online interactive course that helps individuals learn about how to build or assess a strategy for nonprofits or philanthropists.[8]

Implementation: *How do I implement my grants and gifts effectively?*

Although some online resources address how to implement one's philanthropy, they are often produced either by well-known organizations seeking a donor's business or by obscure ones that donors do not trust. In our initial assessment, EPLI identified 54 resources related to philanthropy implementation, specifically related to due diligence, collaboration, types of giving, and monitoring and evaluation. Through our rating and curation process, we pared the list down to 12 that merited further review, and from those recommended only four that we deemed to be the most reliable resources for a DIY philanthropist. With the advancement of the sector, these are likely to change over time.

Community: *Where can I learn with others?*

› **There have been past efforts to increase donor impact through online philanthropy platforms and other resources, but they were unsuccessful because they did not target donors and were not integrated into the donor's early experience.**

See Appendix B for the list of past efforts. Although these efforts have collected valuable resources, most new philanthropists we spoke with were not aware of these organizations or their resources. Additionally, the wealth of information available was overwhelming, and donors specifically asked for a set of highly curated resources that could start them on their journey and address the specific questions that arise at each step of the way.

› **There is a dearth of resources targeted to donor needs that are both experiential and low-to-no-cost.**

Many philanthropy resources are created for a bespoke experience. Because they are highly tailored, targeted, and experiential, they tend to be very costly.

Motivated philanthropists find it difficult to discover inexpensive resources. Resources that are free often fail to satisfy donors' particular needs, and those that do, come with a high price tag. For example, tuition for a high-quality philanthropy workshop can range from $6,000 to $30,000. Hiring a philanthropic advisor can also require considerable resources.

At the other end of the spectrum are resources that are low-cost, but are likely to be more generic, less interactive or engaging, and of limited use to donors trying to make specific decisions about their philanthropic practice. What is missing are good resources that are experiential and low cost.

› **Even if they know where to look, resources vary widely in quality and cost, making it difficult to choose from among them.**

Our interviewees wished for a centralized hub of quality resources. Despite—or perhaps because of—the growing number of articles, books, donor education programs, donor stories, and tool kits that address the topic of effective philanthropy, HNW donors are unsure of how to assess their quality and reliability. These resources are spread across myriad websites and embedded within a wide set of organizations. Often they are promoted by the organizations that created them. Some organizations do not display resources created by others, which makes it difficult for donors to find similar resources.

› **Frequency of use**

Donors would use an online resource more frequently if they could use it to connect to a broader community.

DEVELOPING SOLUTIONS

The targeted beneficiaries for this research project are intellectually curious, independent-minded individuals who enjoy engaging in complex problem, but find their philanthropic planning to be particularly challenging. Our objective was to offer them an easy-to-navigate, neutrally housed and trusted online resource that orients them to vetted philanthropic resources and thus increases the likelihood that they will take positive action.

We explored possible solutions through a process of collective idea generation. In the spirit of human centered design, we developed several "How might we…?" questions to structure the brainstorming of possible solutions, focusing on the following subset of questions:

— *How might we* create and curate resources on effective philanthropy that are provided by neutral and trusted sources?

— *How might we* create a space where high net worth philanthropists can research answers to their questions?

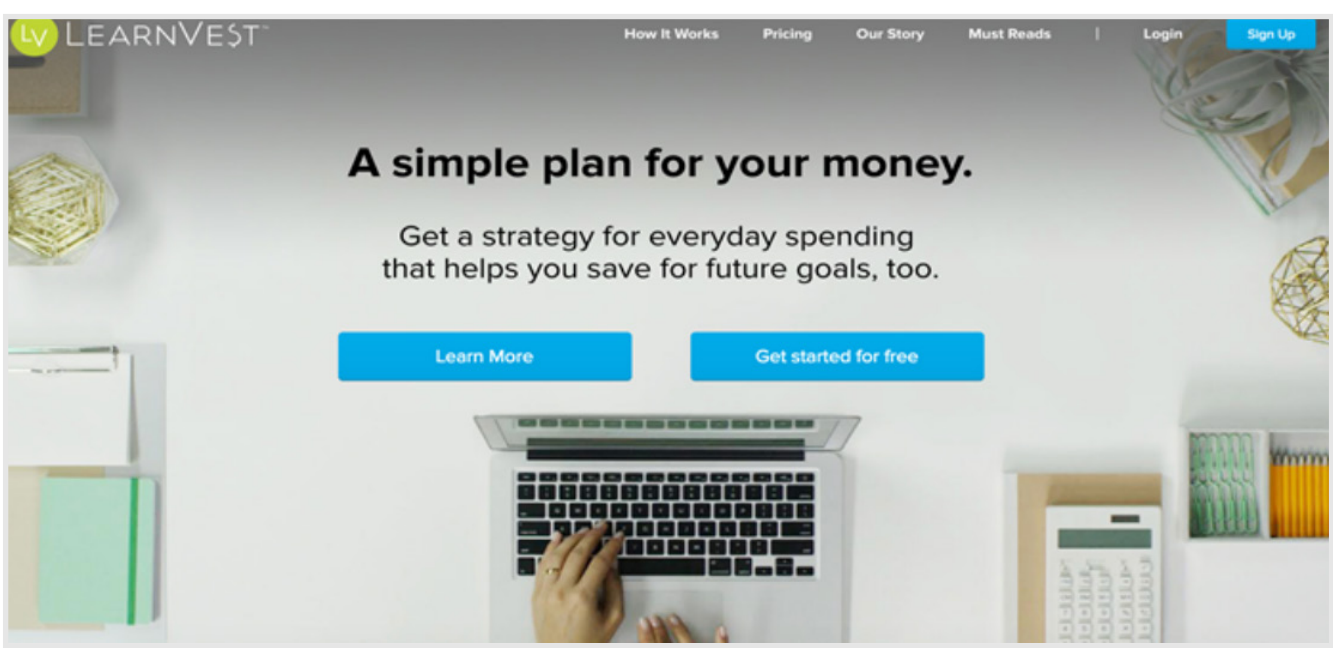
— *How might we* help HNW philanthropists become better oriented with the philanthropy landscape?

ANALOGOUS EXAMPLES THAT INSPIRED OUR DESIGN

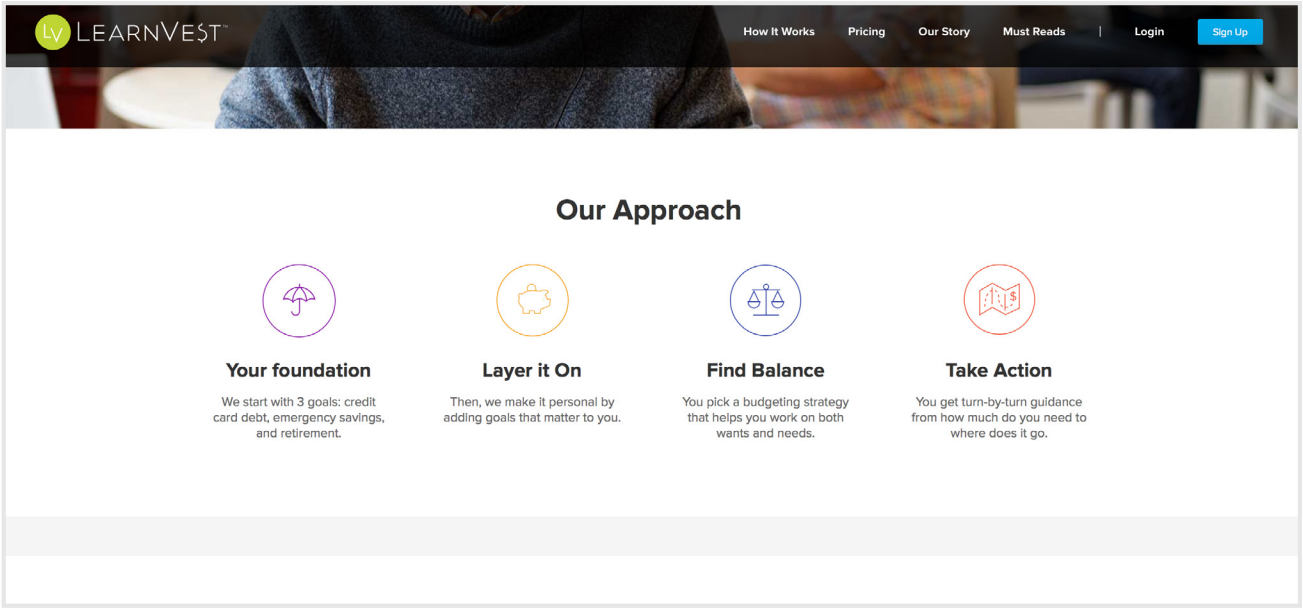
In order to obtain inspiration, we applied the technique of analogous observation. We examined non-philanthropic programs that serve individuals who are navigating complex arenas for the first time, similar to complexity of navigating the arena of philanthropy: choosing health plans, deciding among investment strategies and budgets, building a website, applying to college, even choosing a type of yoga practice or deciding where to vacation. We explored Bloomberg, Morningstar, Wealthfront, Stride Health, MasterClass, Future of Fish, Jauntaroo, Squarespace, Mint, HealthTap, LegalZoom, the Common Application, and Find Your Yoga, among others.

One specific example of an online resource that attempts to simplify a complex process was the 2014 Stanford course taught by Sam Altman on How to Start a Startup.[9] (See Appendix C). The beginning entrepreneur must build a strategy, launch, and then evaluate his or her business plan. Altman's course proved enlightening in suggesting how we might break up the philanthropist's journey into discrete steps, and also how a donor could enter the course at different points, entering in the area of greatest perceived need. Unlike startup entrepreneurs, philanthropic donors might not have to plan the entire journey in advance—a compass, we learned, is a more useful navigational tool than a map.

Another example, LearnVest, in particular stood out and inspired the design of our landing page. It distills financial planning—which involves present and future financial decisions, values, and almost limitless choices—into two easy options to get involved.



LearnVest's clarity about the value of financial planning and why it should matter to its users inspired early versions of our landing page, where we articulated our point of view and why we were curating resources. LearnVest's four icons simplify its users' planning process. This challenged us to make the philanthropist's online experience clear and simple, self-explanatory, and personal.



From these analogous examples, we applied the following best practices to our Giving Compass prototype:

— Clearly state the website's publisher's beliefs and values.

— Provide a clear path from framework to action.

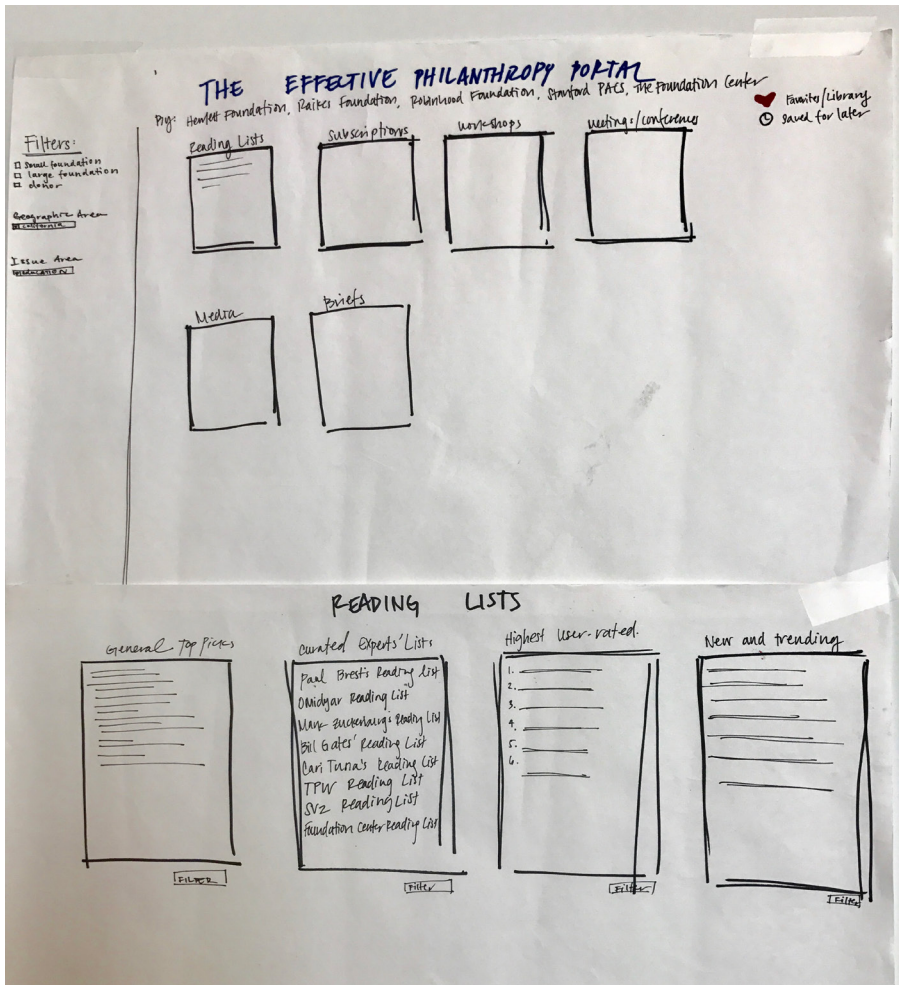
— Have a home page that is easy to navigate and provides a few key entry points

PROTOTYPE OF EPLI GIVING COMPASS

Armed with the insights gathered from our interviews, and inspired by the results of our "How might we…?" brainstorming sessions, we used simple paper and markers to create deliberately rough models of a free, online platform of curated resources, which we presented to our targeted population for feedback. The initial prototypes served as ways to gain deeper understanding of donor motivations and needs. As the iterative process continued, we moved on to higher-fidelity prototypes and began to invest more time in testing their usability as well.[10] Throughout the process, we tested our prototypes with our targeted beneficiaries, incorporated their feedback into our subsequent designs, and repeated the process.

FINAL PROTOTYPE

PROTOTYPE VERSION 1



Appendix C provides images of subsequent prototypes.

REMAINING QUESTIONS

Although we were able to identify some clear needs, specifically for the DIY philanthropist, we concluded this project with many remaining questions about the Giving Compass prototype:

— How do we keep users engaged with the site?

— Should the site be co-curated, or managed by a single group?

— Should the site take the form of a stand-alone website, or would it be more effective if it were embedded within existing platforms and networks?

— Can we persuade experienced strategic philanthropists to share their experiences through the Giving Compass?

DESIGN PRINCIPLES FOR ONLINE PHILANTHROPY RESOURCES FOR DIY PHILANTHROPISTS

—

Based on our research, we derived the following design principles and criteria for solutions to our stated problem and used them to inform our initial prototypes. Any resource that is designed to respond to our beneficiaries' needs, should address these design principles:

— Compelling: Take advantage of multimedia, first-person storytelling, current news.

— Engaged: Provide opportunities for user comments, questions, and, reviews.

— Expert: Writings and commentaries should include some by recognized authorities.

— Interactive: Include recommendation from peers and experts, and allow for their comments.

— Neutral: The platform should be hosted by multiple organizations, and they should not be self serving.

— Objective: All information should be free of bias and ideology.

— Online: The Giving Compass should be accessible, editable, and continuously updated.

— Relevant: Allow for trending of most recent articles; include active discussion section.

— Self-paced: Acknowledge the complex lives of people in this donor category.

— Supportive: Respect the "do it yourself" mindset of the active seeker.

— Targeted: Filter information according to the needs of this particular donor group.

CONCLUSION

The goal of this project was to identify a significant user group—early-stage do-it-yourself HNW donors who wish to be actively engaged in philanthropy—to discover the common challenges they encountered and design reliable, high-quality resources for them through an easy-to-navigate interface.

Our research led us to a number of insights and opportunities that informed our ultimate design.

- **Donors need a better orientation experiences on how to begin and navigate through their philanthropy journey**
- **There is a need to build more interactive and low-cost to no-cost philanthropy resources, especially for the new DIY philanthropists**
- **Donors are looking for resources from neutral and trusted entities**

EPLI is currently developing additional tools and resources to address the needs of HNW philanthropists, and to support the professionals who advise them.

RAIKES FOUNDATION PRODUCT LAUNCH OF THEIR GIVING COMPASS

Following the completion of our research, the Raikes Foundation developed Giving Compass™ (www.givingcompass.org). The team drew upon some of our initial insights and designed a new interface and experience with the goal of "working with partners to help donors who want to 'up their game' and give with greater impact." The Giving Compass (GC) team is developing partnerships across the donor education landscape to aggregate content and create an easy-to-navigate user experience that will help inform and engage donors seeking to have more impact.

APPENDIX A:

LIST OF INTERVIEWED EXPERTS

Julita Eleveld
Senior Program Officer
Bill and Melinda Gates Foundation

Jackie Elias
Managing Director
JP Morgan Chase Private Bank

Glen Galaich
(Former) Chief Executive Officer
The Philanthropy Workshop

Jake Garcia
Vice President
Data and Technology Strategy
Foundation Center

Grant Kaley
Vice President
Program Management
Fidelity Charitable

Hahn Le
(Former) Chief Program Officer
Exponent Philanthropy

Larry Leibowitz
Philanthropist

Lindsay Louie
Program Officer
Effective Philanthropy Group
The William and Flora
Hewlett Foundation

Tricia McKay
Consultant
Raikes Foundation

Cindy Mercer
Cofounder and Vice President
Planet Heritage

Valeria Merino
Senior Manager
Community Engagement
Skoll Foundation

Felicity Meu
(Former) Director
Next Generation Giving,
The Stanford Fund
Stanford University

Mario Morino
Founding Chairman
Venture Philanthropy Partners

Hope Neighbor
Partner
Camber Collective

Evan Paul
Vice President
Products
Guidestar USA

Stefan Podvojsky
Senior Vice President
Investments and Program Management
Fidelity Charitable

Jen Ratay
Executive Director
Silicon Valley Social Venture Fund

Rob Rosen
Director
Philanthropic Partnerships
Bill and Melinda Gates Foundation

Katherine Rosqueta
Founding Executive Director
Center for High Impact Philanthropy
University of Pennsylvania

Elangovan Shanmugam
Distinguished Architect /
Director Mint.com at Intuit

Paul Shoemaker
(Former) Executive Director
Social Venture Partners

Walter Sweet
Vice President
Rockefeller Philanthropy Advisors

Mariko Tada
(Former) Director
Rockefeller Philanthropy Advisors

Nick Tedesco
Senior Philanthropic Advisor
The Philanthropy Centre at J.P. Morgan

Cari Tuna
Cofounder
Good Ventures

Steve Toben
President
The Flora Family Foundation

Fay Twersky
Director
Effective Philanthropy Group
The William and Flora Hewlett Foundation

Victoria Vrana
Senior Program Officer
Charitable Sector Support Team
Bill and Melinda Gates Foundation

Johan Whittkamper
Cofounder and Global Director
Nexus

APPENDIX B:

LIST OF PAST AND EXISTING EFFORTS AT DEVELOPING AN ONLINE PLATFORM FOR PHILANTHROPY EDUCATION RESOURCES

Between 2006 and 2014, the Hewlett Foundation's Effective Philanthropy Group, led by Jacob Harold, invested $12 million in its *Nonprofit Marketplace Initiative*. The Group's goal was that "by 2015, ten percent of individual philanthropic donations in the US (or $20 billion) would be influenced by meaningful, high-quality information about nonprofit organizations' performance." As part of this Initiative, the Hewlett Foundation supported the Donor Effectiveness Network (DEN) from 2008 to 2012, which established common outcome-oriented standards among a group of donor education providers. The initiative was terminated in 2014 because, for the most part, it did not seem effective in achieving its goals.[11]

The Bill & Melinda Gates Foundation made grants in 2010 that supported The Bridgespan Group's videos of donor narratives, Rockefeller Philanthropy Advisors' Donor Roadmap documents, and Bolder Giving's donor videos. These organizations did not have a robust outreach strategy for making these documents available to HNW donors outside of their direct network.

Below is a list of previous and current donor education and engagement online platform attempts and philanthropic impact initiatives:

Dorothy A. Johnson Center for Philanthropy at Grand Valley State University's *Learn Philanthropy*, which includes a library of tools, learning briefs, interviews, webinars, and book recommendations. http://learnphilanthropy.org/

Foundation Center's GrantCraft, which develops and curates resources across different strategies (advocacy, capacity building) and issues (arts and culture, civic engagement). http://www.grantcraft.org/

National Center for Family Philanthropy's *Knowledge Center*, which provides thousands of resources for family philanthropists, including discussion papers, sample policies, assessment tools, and webinar links.
https://www.ncfp.org/resource/knowledge-center/

Exponent Philanthropy's Resources *database*.
http://www.exponentphilanthropy.org/resources/by-topic

Rockefeller Philanthropy Advisors' *Philanthropy Roadmap*, which includes a series of guides such as F*unding Locally*, *Impact Investing*, and *Making Change Happen*.
http://roadmap.rockpa.org/

The Foundation Registry i3, which provides an online "walled garden," a restricted space for subscribed foundations to identify and collaborate with one another.
https://www.foundationregistryi3.org/

APPENDIX C:

"HOW TO START A STARTUP" COURSE LECTURES

Lecture 1 - How to Start a Startup (Sam Altman, Dustin Moskovitz)

Lecture 2 - Team and Execution (Sam Altman)

Lecture 3 - Before the Startup (Paul Graham)

Lecture 4 - Building Product, Talking to Users, and Growing (Adora Cheung)

Lecture 5 - Competition is for Losers (Peter Thiel)

Lecture 6 - Growth (Alex Schultz)

Lecture 7 - How to Build Products Users Love (Kevin Hale)

Lecture 8 - How to Get Started, Doing Things that Don't Scale, Press

Lecture 9 - How to Raise Money

Lecture 10 - Culture (Brian Chesky,

Lecture 11 - Hiring and Culture, Part

Lecture 12 - Building for the

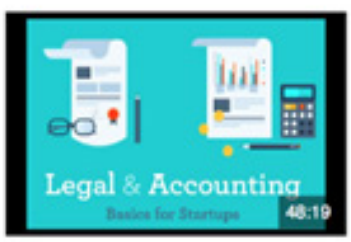
Lecture 13 - How to be a Great Founder (Reid Hoffman)

Lecture 14 - How to Operate (Keith Rabois)

Lecture 15 - How to Manage (Ben Horowitz)

Lecture 16 - How to Run a User Interview (Emmett Shear)

Lecture 17 - How to Design Hardware Products (Hosain Rahman)



Lecture 18 - Legal and Accounting Basics for Startups (Kirsty Nathoo, Carolynn Levy)

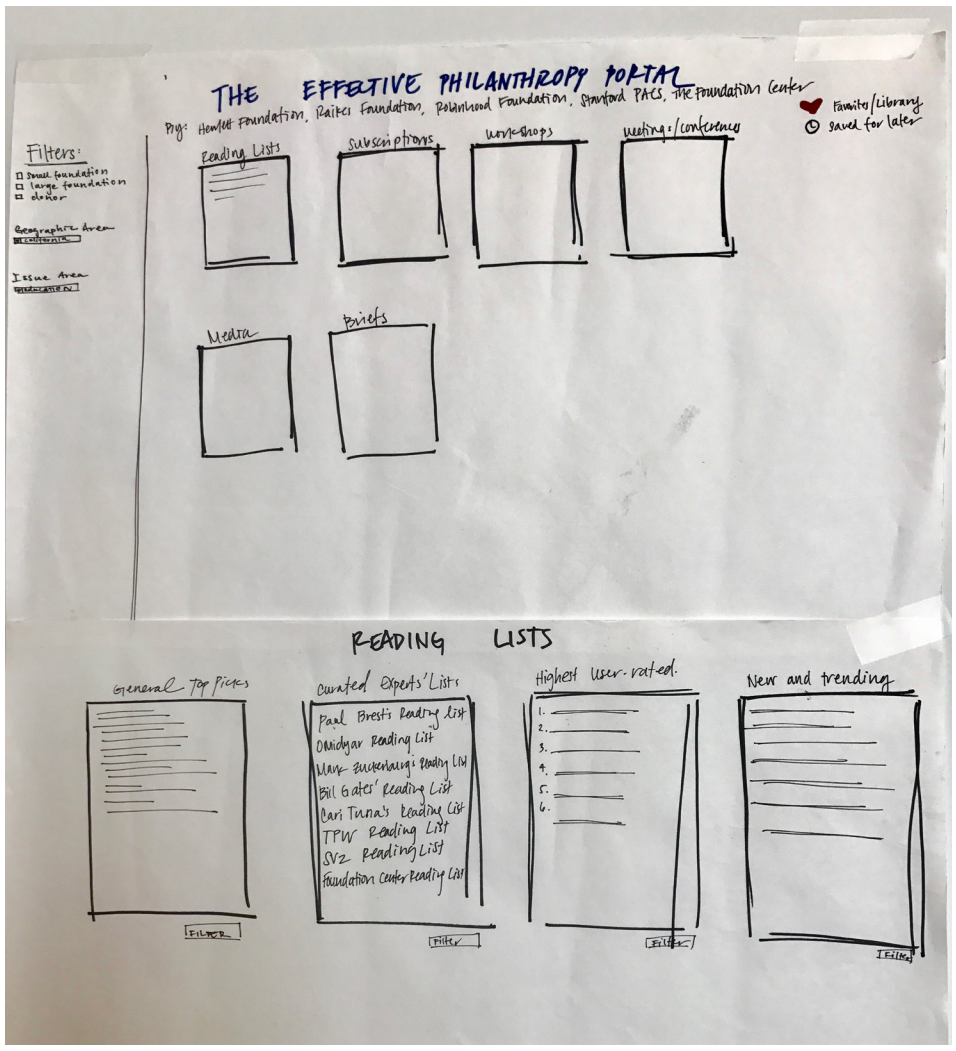
Lecture 19 - Sales and Marketing; How to Talk to Investors (Tyler Bosmeny; YC Partners)

Lecture 20 - Later-stage Advice (Sam Altman)

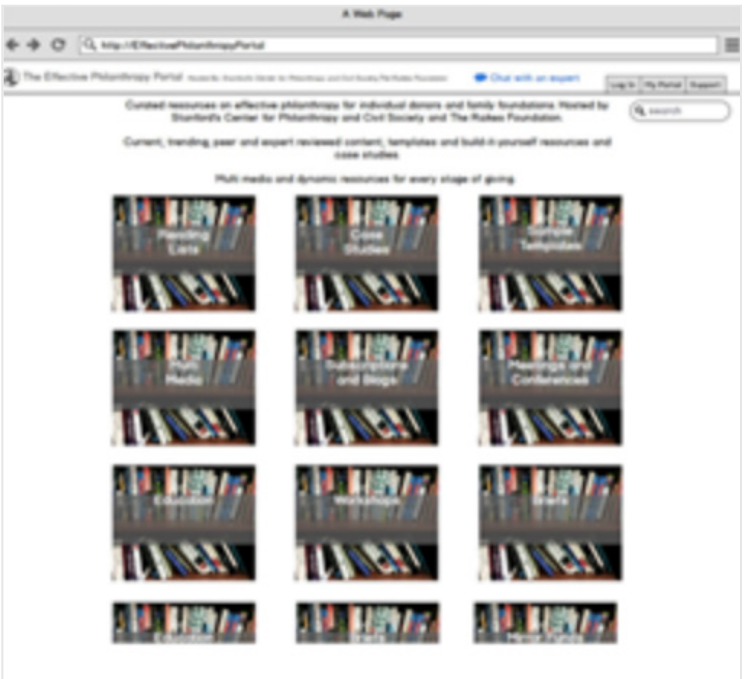
APPENDIX C:

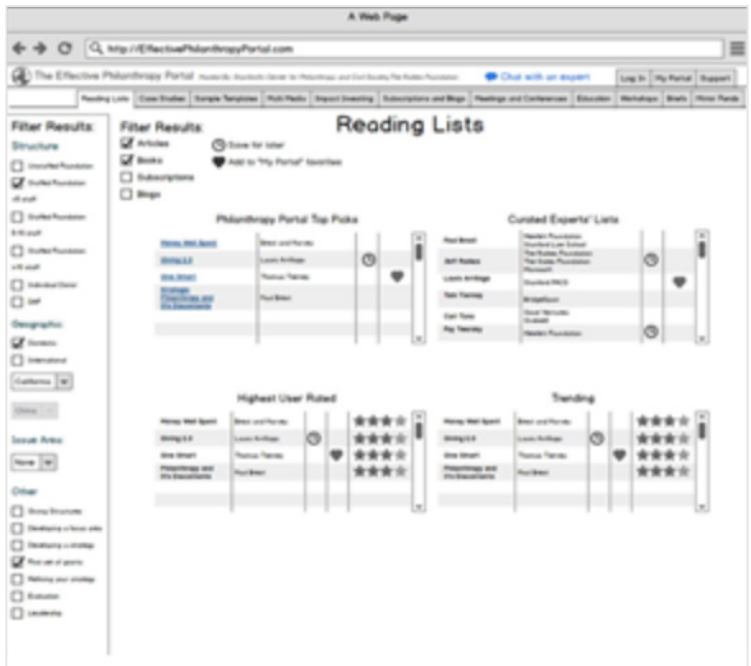
GIVING COMPASS PROTOTYPE ITERATIONS

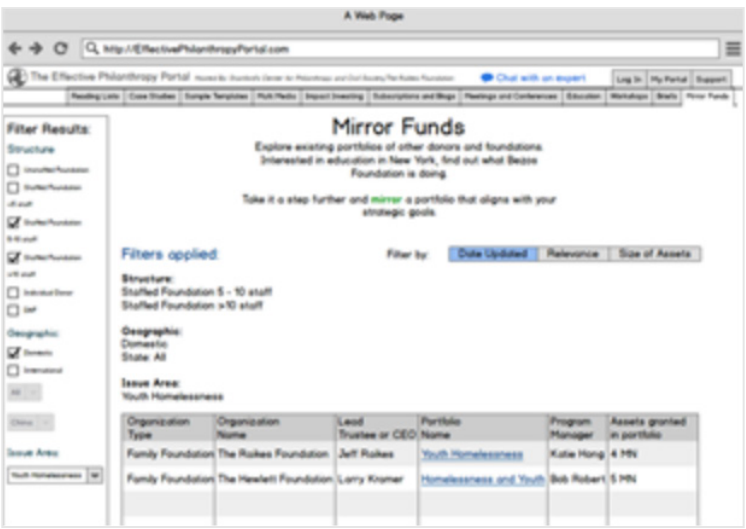
PROTOTYPE VERSION 1



PROTOTYPE VERSION 2

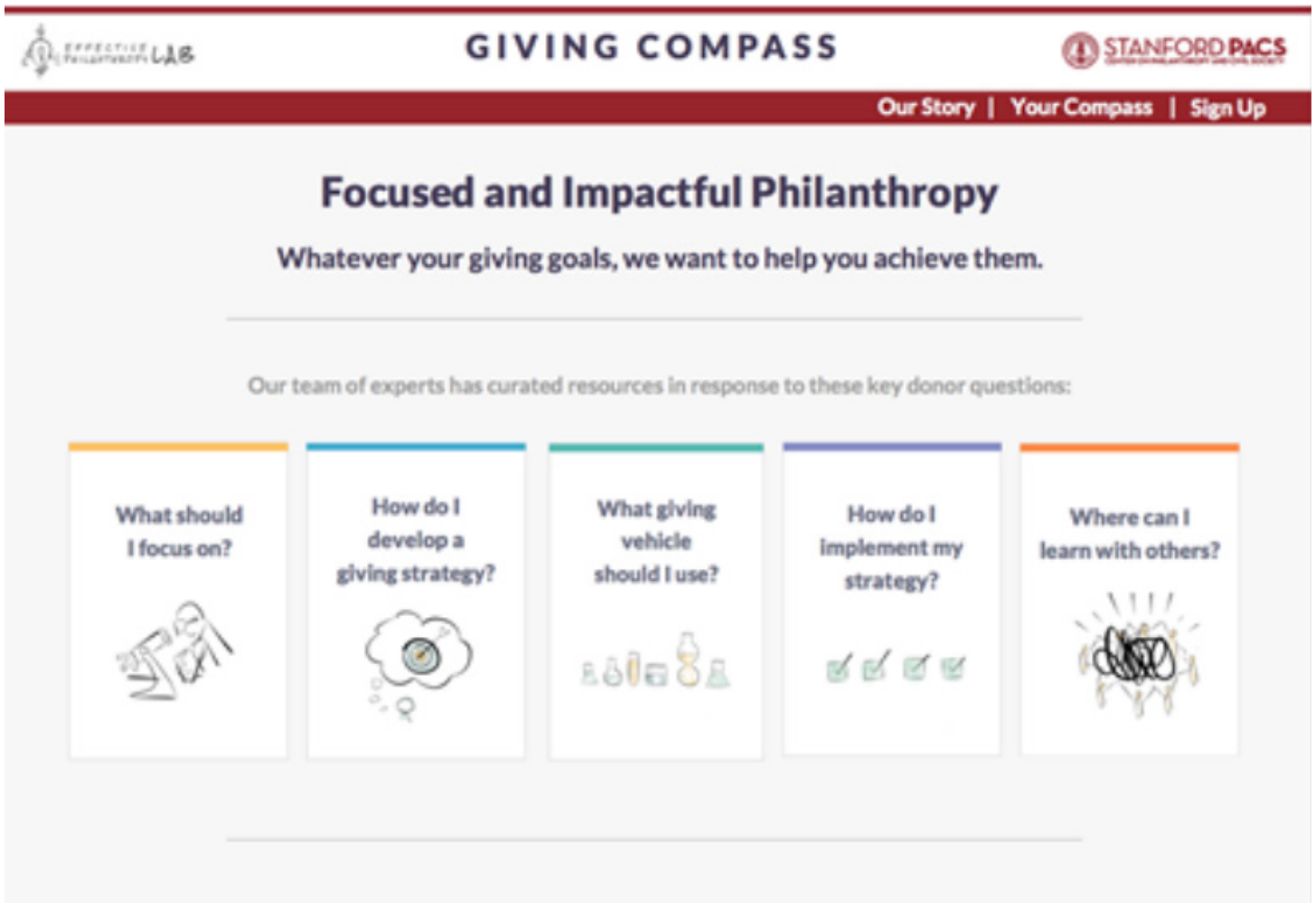






PROTOTYPE VERSION 3

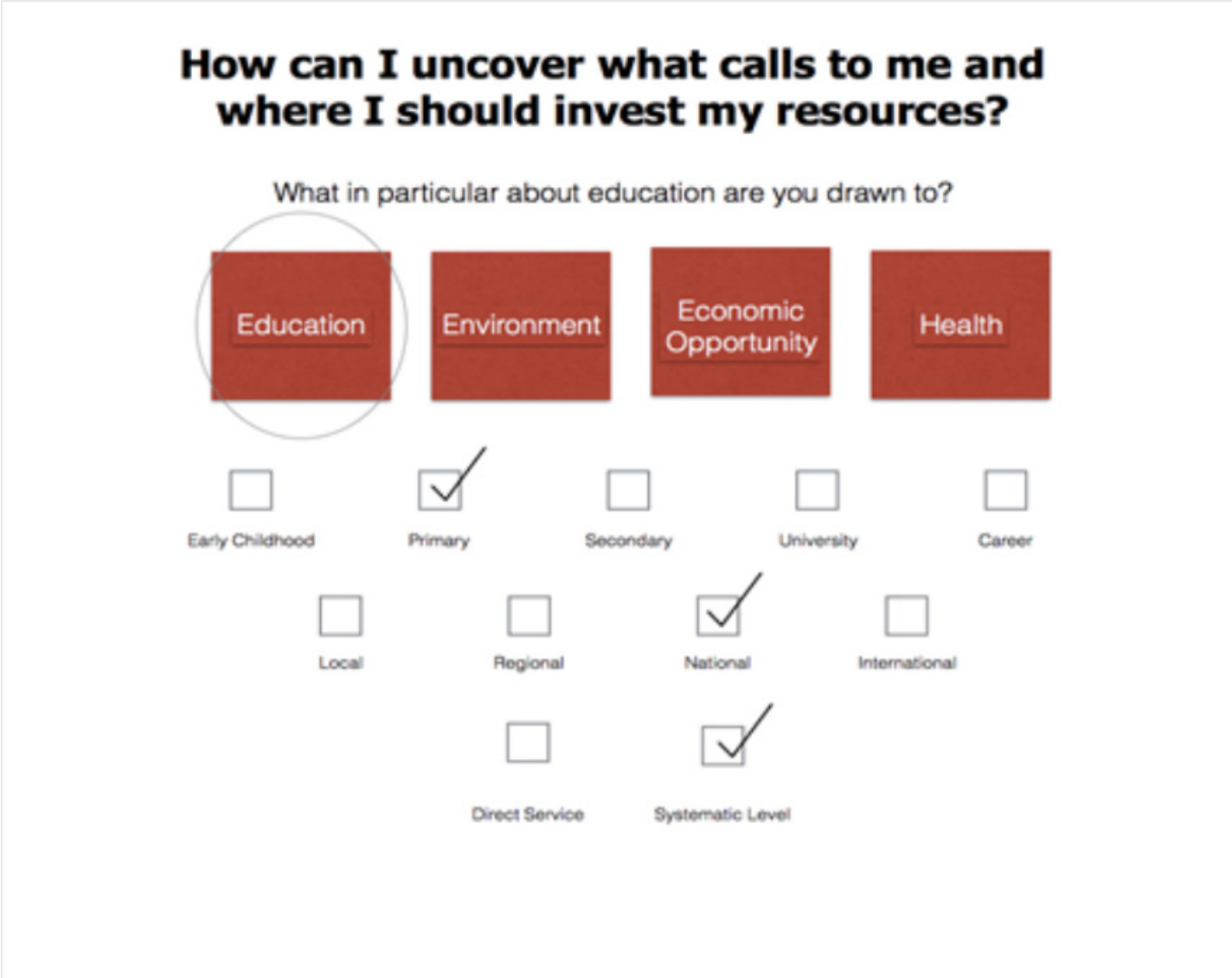
PROTOTYPE VERSION 4

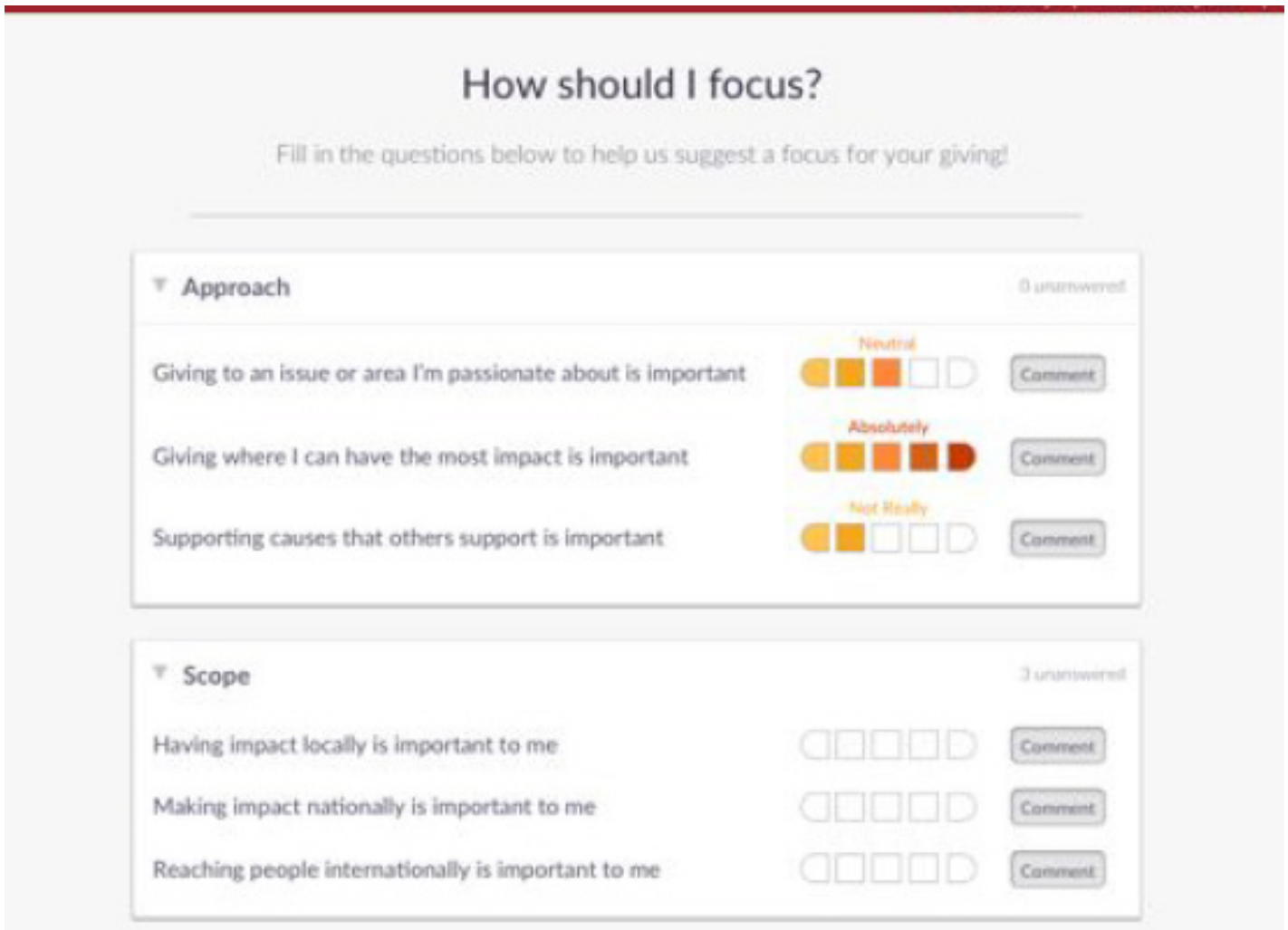


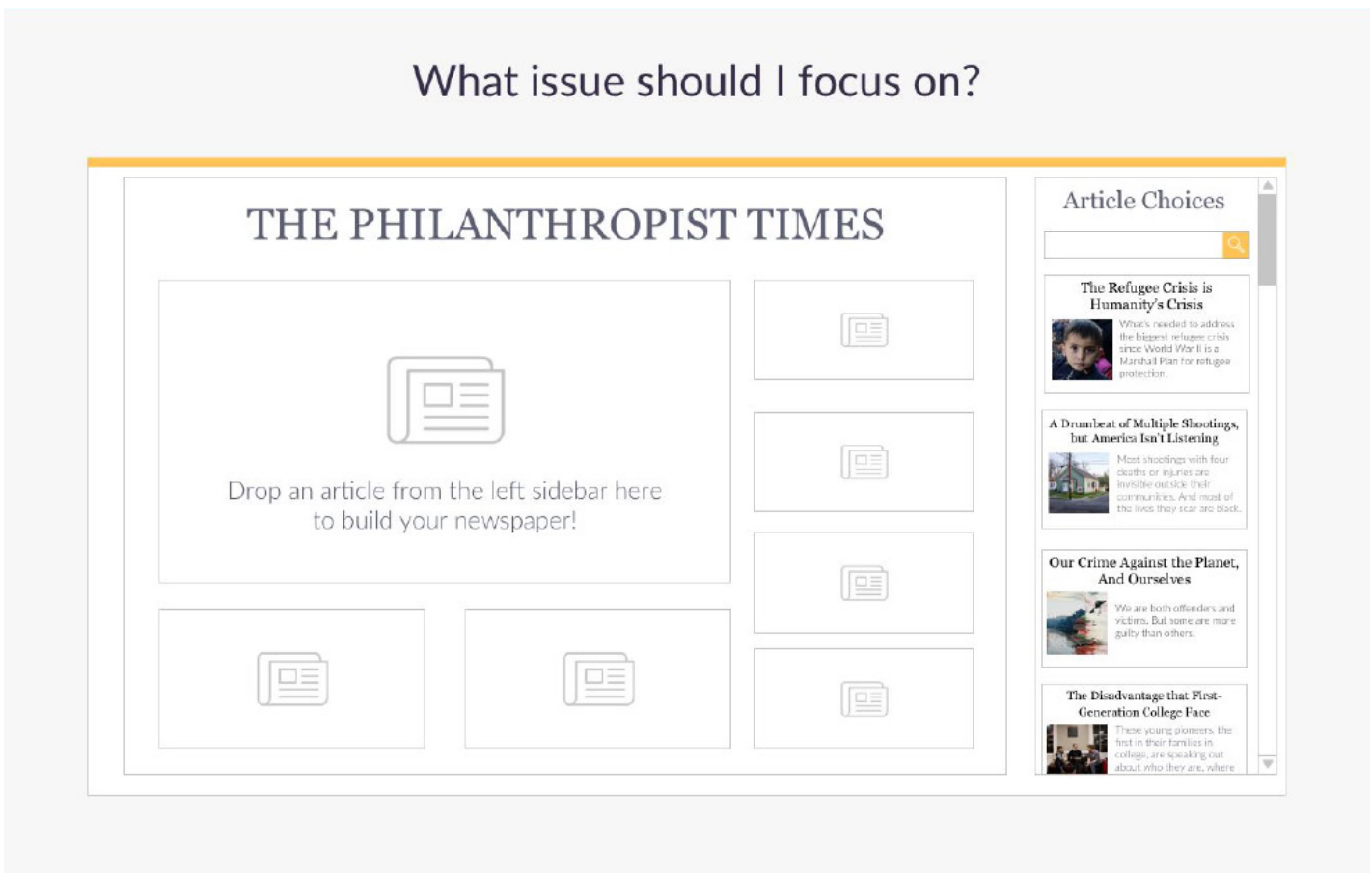
APPENDIX D:

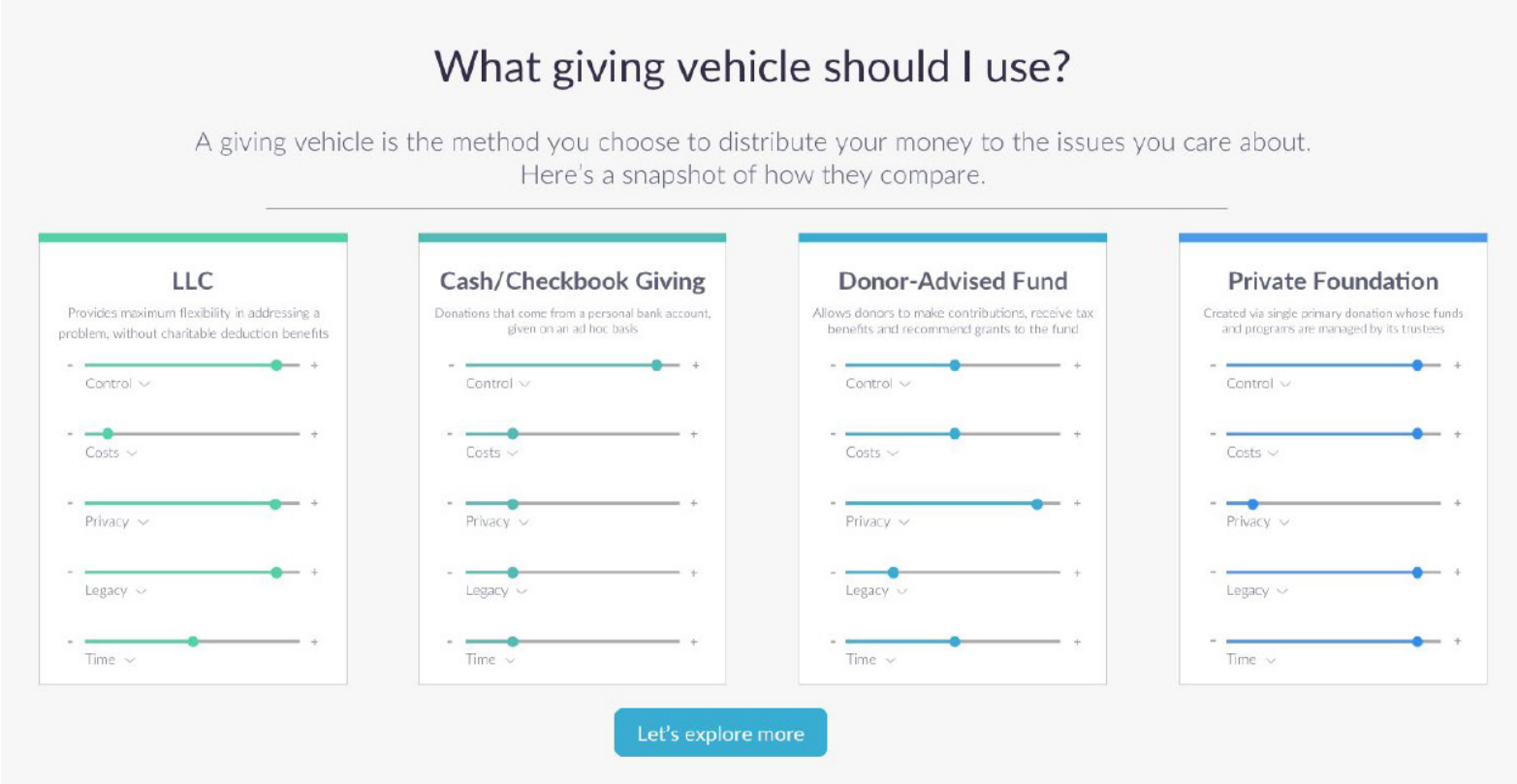
GIVING COMPASS SUBPAGE DESIGNS

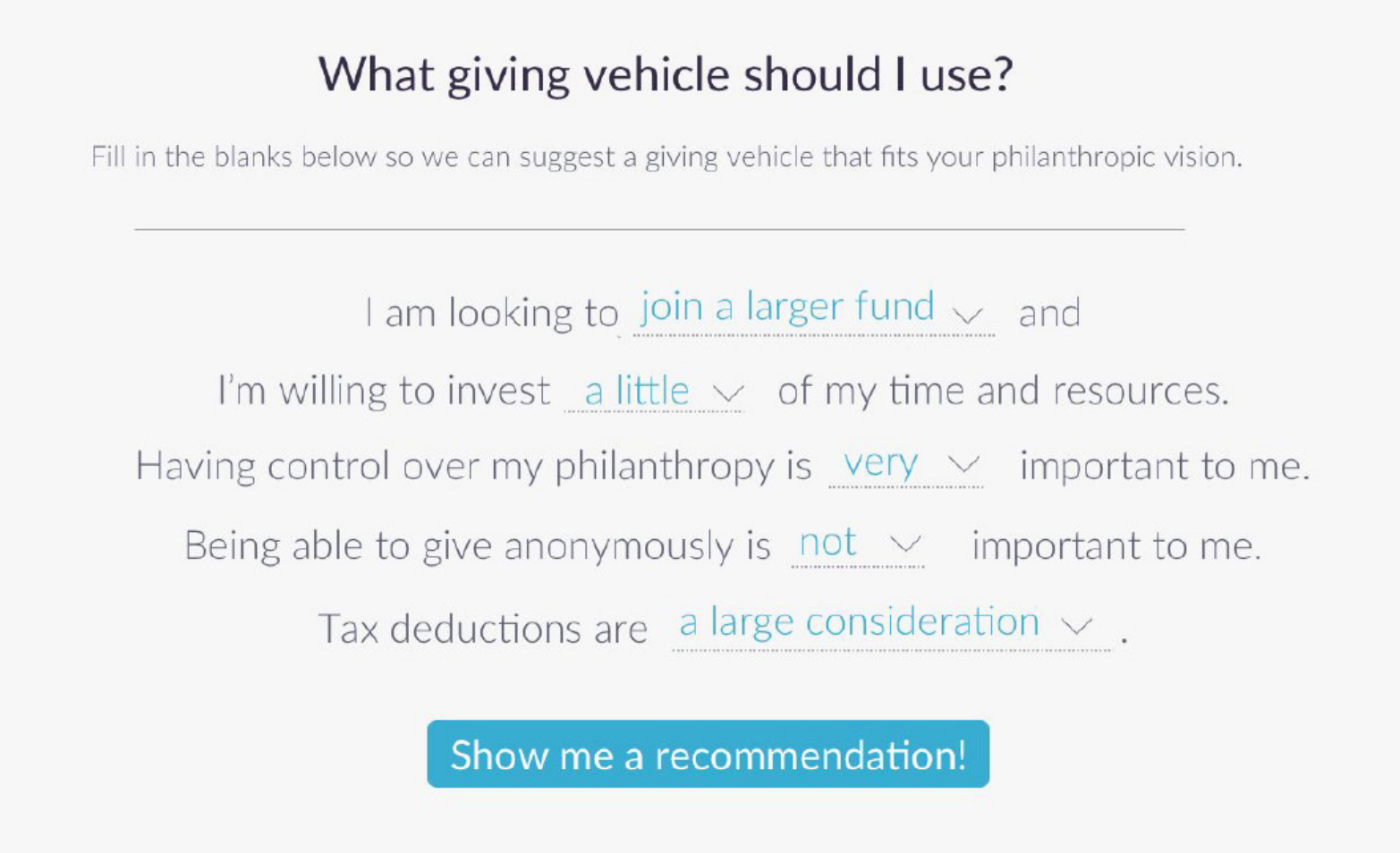
FOCUS




How should I focus?
Fill in the questions below to help us suggest a focus for your giving!
Approach
0 unanswered
Giving to an issue or area I'm passionate about is important
Neutral
Comment
Giving where I can have the most impact is important
Absolutely
Comment
Supporting causes that others support is important
Not Really
Comment
Scope
3 unanswered
Having impact locally is important to me
Comment
Making impact nationally is important to me
Comment
Reaching people internationally is important to me
Comment


What issue should I focus on?
THE PHILANTHROPIST TIMES
Drop an article from the left sidebar here to build your newspaper!
Article Choices
The Refugee Crisis is Humanity's Crisis
What's needed to address the biggest refugee crisis since World War II is a Marshall Plan for refugee protection.
A Drumbeat of Multiple Shootings, but America Isn't Listening
Most shootings with four deaths or injuries are invisible outside their communities. And most of the lives they scar are black.
Our Crime Against the Planet, And Ourselves
We are both offenders and victims. But some are more guilty than others.
The Disadvantage that First-Generation College Face
These young pioneers, the first in their families in college, are speaking out about who they are, where


What giving vehicle should I use?
A giving vehicle is the method you choose to distribute your money to the issues you care about.
Here's a snapshot of how they compare.
LLC
Provides maximum flexibility in addressing a problem, without charitable deduction benefits
Cash/Checkbook Giving
Donations that come from a personal bank account, given on an ad hoc basis
Donor-Advised Fund
Allows donors to make contributions, receive tax benefits and recommend grants to the fund
Private Foundation
Created via single primary donation whose funds and programs are managed by its trustees
Control
Costs
Privacy
Legacy
Time
Let's explore more


What giving vehicle should I use?
Fill in the blanks below so we can suggest a giving vehicle that fits your philanthropic vision.
I am looking to join a larger fund and
I'm willing to invest a little of my time and resources.
Having control over my philanthropy is very important to me.
Being able to give anonymously is not important to me.
Tax deductions are a large consideration .
Show me a recommendation!


GIVING COMPASS
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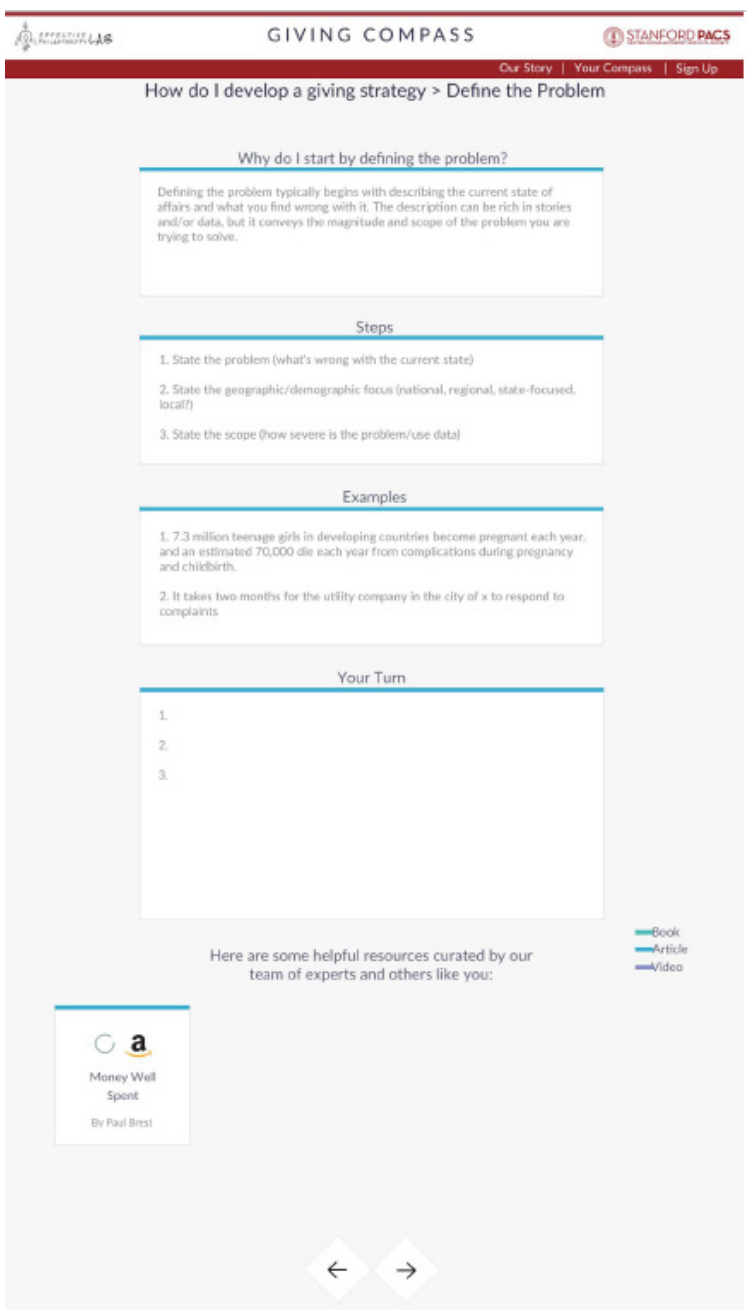
Steps to develop a Thoughtful Giving Strategy
What are you trying to solve?
1 Define the Problem
2 Identify Possible Causes
3 Determine Your Approach
4 Specify Your Intended Impact
How will you solve it?
8 Describe a Logic Model
7 Predict Weaknesses
6 Identify Stakeholders
5 Describe a Theory of Change
How will you determine if you're having an impact?
9 Predict Problems in Executing
10 Identify Problems in Scaling
11 Specify Metrics and Outcomes
Congratulations on completing the steps!


GIVING COMPASS
STANFORD PACS
Our Story | Your Compass | Sign Up
How do I develop a giving strategy > Define the Problem
Why do I start by defining the problem?
Defining the problem typically begins with describing the current state of affairs and what you find wrong with it. The description can be rich in stories and/or data, but it conveys the magnitude and scope of the problem you are trying to solve.
Steps
1. State the problem (what's wrong with the current state)
2. State the geographic/demographic focus (national, regional, state-focused, local?)
3. State the scope (how severe is the problem/use data)
Examples
1. 7.3 million teenage girls in developing countries become pregnant each year, and an estimated 70,000 die each year from complications during pregnancy and childbirth.
2. It takes two months for the utility company in the city of x to respond to complaints
Your Turn
1.
2.
3.
Here are some helpful resources curated by our team of experts and others like you:
Book
Article
Video
Money Well Spent
By Paul Brest

How do I implement my strategy?

After you develop your area of focus and giving strategy, consider how you might implement your strategy with these in mind

1. How might I conduct **due diligence**?
2. How might I **collaborate** with other funders?
3. How do I decide to **make a gift**?
4. How might I **monitor & evaluate** gifts?

We've compiled some helpful resources you can explore to carry these out!

Let me see!

Strategy Implementation Resources

We've compiled some helpful resources for you to explore!

Due diligence | Collaboration | Making gifts | Monitoring & evaluating

Articles | Books | Templates | Toolkits

Effective Communication with Grantees

Exponent Philanthropy
Description of book. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Guide to Evaluating Collective Impact

FSG
Description of book. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

What kind of learning experience are you looking for?

Conferences and in-person events

Online

Giving circles and other giving communities

EFFECTIVE PHILANTHROPY LAB

GIVING COMPASS

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Here are a few different ways on engaging online.

MOOCs

Paul Brest, "Essentials of Nonprofit Fundraising" with Philanthropy University

Laura Arillaga-Andreesen, "Giving 2.0" with Coursera

Philanthropy U
Free courses on philanthropy

Coursera
Need to search by specific interest area, such as anti-human trafficking

Videos

Top Ted Talks on Philanthropy

Bryan Stevenson, "We need to talk about Injustice"

Dr. Nadine Burk, "How Childhood Trauma Effects Health Across a Lifetime", TedX Talks

Podcasts

Ted Radio Hour, Giving It AllAway

Freakonomics, "Fighting Poverty with Actual Evidence"

Forums

Quora- Subscribe to the Philanthropy or Charity and Charities subject.

Reddit- Subscribe to Philanthropy sub Reddit.

Follow Experts

We're currently curating our list. Look to this section for updates.

Giving circles and other giving communities

PACS Stanford Innovation Summit

An invitation-only summit for individual and family philanthropists to discuss their giving in an intimate, non-solicitation environment.

Frequency: Annual

Audience: Individual and Family Philanthropists.

Location: Stanford, CA (West)

NOTES

[1] The research built upon its earlier case study, "Design Thinking and Strategic Philanthropy Case Study: Raikes Foundation," which provides an initial taxonomy of donor behavioral profiles. Nadia Roumani, Paul Brest, and Olivia Vagelos, *Design Thinking and Strategic Philanthropy Case Study.* https://pacscenter.stanford.edu/wp-content/uploads/2015/11/Stanford-PACS-Raikes-Foundation-Case-Study-9-2-2015-.pdf

[2] This paper was written by Nadia Roumani and Julie Aleman. Stanford graduate student Roxana Shirkhoda and undergraduate students Vicki Niu and Arushi Jain contributed to the research and designs. Olivia Vagelos contributed to the research and writing of the Raikes Foundation Case Study, which provided the original research and insights for the Giving Compass. For more information about the Effective Philanthropy Learning Initiative, please visit http://pacscenter. stanford.edu/the-effective-philanthropy-Learning-Initiative.

[3] See, e.g., Paul Brest, Nadia Roumani, and Jason Bade, *Problem Solving, Human-Centered Design, and Strategic Processes.* https://pacscenter.stanford.edu/2015/09/problem-solving-human-centered-design-and-strategic-processes/

[4] EPLI will be posting this landscape map in Fall 2018 on the EPLI website.

[5] Roumani et al., "Design Thinking and Strategic Philanthropy Case Study."

[6] Camber Collective. *Money for Good*. 2015. http://www.cambercollective.com/moneyforgood/

[7] https://www.effectivealtruism.org

[8] The interactive strategic philanthropy course, is available on the Stanford PACS website. https://pacscenter.stanford.edu/research/effective-philanthropy-learning-initiative/tools-prototypes/

[9] http://startupclass.samaltman.com. For this project, See Appendix B for the class list.

[10] For this project, we remained in the design phase and did not move to building

the actual site.

[11] See Follow-Up on Our Decision to End the Nonprofit Marketplace Initiative. http://www.hewlett.org/follow-up-on-our-decision-to-end-the-nonprofit-marketplace-initiative/. The DEN network released a set of core principles and practices, which provided a foundation for the Raikes Foundation's current Impact Driven Philanthropy Initiative (IDPI).