



CHAPTER 3

**LEARNING ABOUT PHILANTHROPY WITH
AND FROM OTHERS**

PHILANTHROPY CAN BE VERY PERSONAL, and the process of giving can sometimes feel like a solitary pursuit. Though you will inevitably work with many others outside your family—including nonprofits, their beneficiaries, and co-funders—as you develop your philanthropic practice, you can still feel that you are alone at the helm. This chapter answers an important question:

- How can I learn with and from others about the giving process?

You can begin your philanthropic planning by learning more about your selected focus areas from experienced peer donors, philanthropic experts, and other sector specialists. Quite a few organizations offer educational and networking opportunities for both new and experienced donors. You can also hire experts to support you throughout your giving.

Learning Resource: Philanthropist Resource Directory

The Stanford PACS Effective Philanthropy Learning Initiative designed the Philanthropist Resource Directory (PRD)—an inventory of approximately 280 organizations across the United States that support donors’ activities. You can visit it here:

pacscenter.stanford.edu/philanthropist-resource-directory

The PRD includes three types of philanthropic support organizations: education providers, peer networks, and research and data providers.



Education providers: These organizations provide educational supports for donors, including events, workshops, conferences, research, online courses, and programs. The Philanthropy Workshop, the Social Impact Collective, Boulder Giving, and Founders Pledge are all examples of education providers that work directly with donors to support their philanthropic journey.



Peer networks: Some education providers support peer learning. In addition, giving circles are an important type of peer network for donors. They convene a network of peers in learning and collaboration activities, and they may also present joint funding opportunities.

Giving circles can be especially good places to learn about the focus areas you care about because they create philanthropic communities that share knowledge and information. They are usually hosted by nonprofit organizations. Giving circles also allow donors to contribute to pooled funds related to specific issues or geographic areas; donors then decide together how and where to distribute the funds (see **Chapter 11: Funding with Others**). Some examples of giving circles include the Asian Women Giving Circle in New York, the Environmental Defense Fund’s Catalyst Giving Circle, the Jewish Venture Philanthropy Fund, Solidaire, Latino Giving Circle Network, and Next Generation of African American Philanthropists.

Affinity groups allow donors to come together around shared issue areas (such as protecting oceans or improving children’s health) or locales (for example, the San Francisco Bay Area or Francophone Africa) or identities (such as Asian Americans & Pacific Islanders or women). Affinity groups host a range of activities, including in-person meetings with expert panels, interactive workshops, and social gatherings. Webinars and email subscription lists provide updates on current events related to the group or create a space for group members to share their ideas and experiences. Affinity groups also function as peer networks.

Learning with Others at SV2—*Kelly Pope*

A staff member from one of the nonprofits I was involved with told me about Silicon Valley Social Venture Fund (SV2), which my husband David and I joined in 2011. SV2 is a community of more than 200 individuals and families who come together to learn about effective giving and to pool resources to support innovative social ventures.

Early in my career, I wasn't connected to many networks so I didn't understand their value. SV2 taught me just how important being part of a network is in philanthropy. The network helps individuals amplify their impact for social causes and helps accelerate their learning.

I believe that the SV2 year-long learning experience up-leveled my abilities as a philanthropist. I learned to see things from a systems point of view. That's important when you are working to maximize impact.

There is something to be said for learning as a group. Maybe I would have come to it eventually on my own, but it would have been a much harder, longer route. The network at SV2 accelerated my journey. The reason for this is that at SV2, people come first, there is power in the Partnership. The staff and the Partners (members) are forward-thinking and have open minds. So, it's partly the process and the culture, but it's also the people.



Research and data providers: These organizations conduct research and provide data to support donors in their philanthropic efforts. Examples of research and data providers include Stanford PACS' Effective Philanthropy Learning Initiative, GuideStar (by Candid)*, GiveWell, and the University of Pennsylvania Center for High Impact Philanthropy (for more information on GuideStar and Charity Navigator, see **Chapter 8: Due Diligence**).

* In 2019, GuideStar and the Foundation Center merged under the name Candid. candid.org/about

Learning With Others Through the Solidaire Network— *Jane Lerner*

I'm relatively new to this world of philanthropy. I joined Solidaire two weeks after the 2016 election. It was Trump's election that motivated me and brought me to a profound realization that I was not doing enough work, giving enough money or time or energy toward doing better in the world. I was living in a bit of a bubble. I was desirous of a more philanthropic life but I was quite intimidated.

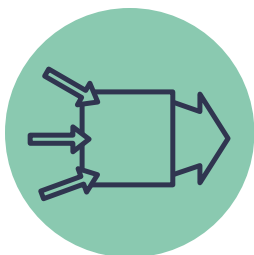
When my mom died, my sister and I came into an inheritance and I was actually quite uncomfortable with this wealth. When I joined Solidaire, I literally knew nothing. I joined not even knowing much about the network but knowing that most of the \$15K membership would be part of a Research & Development grant fund, going to causes that I cared about. I was joining a community of people who were so knowledgeable about social justice work, electoral politics, philanthropy, and how to move money working within a community. Solidaire has provided me with so much knowledge and understanding and community and moved this work forward for me in a way I never in a millions years would have gotten to by myself.

Obtaining Professional Support



Advisors: If you would like professional help with your philanthropy, there is an array of services at your disposal. For instance, if you need help finding effective organizations in one of your focus areas, you might consult an expert in the field. In addition, the Stanford PRD shares philanthropic advisory firms that can support various aspects of your giving, from developing your philanthropic strategy to setting up your giving vehicle, finding and

vetting organizations, and making specific gifts.* Because anyone can print a business card calling himself an expert philanthropic advisor, the PRD does not name individual philanthropic advisors. In addition to scrutinizing an advisor’s publications, you should ask for references.



Funding Intermediaries: The Stanford PRD also includes funding intermediaries. This is a catchall term for entities that facilitate donors’ contributions to nonprofit organizations. Examples of funding intermediaries are community foundations and funder collaboratives. Some funding intermediaries also have experts who advise donors on their philanthropic strategy and grantmaking. They may also provide administrative assistance and grant management.

Community foundations are public charities** that support donors and nonprofit organizations in particular regions. Donors may contribute to a community foundation’s endowment or targeted fundraising campaigns, helping the foundation make grants to local nonprofits; open a donor advised fund hosted by the community foundation (for more information on donor advised funds and other giving vehicles, see **Chapter 4: Giving Vehicles**); create “supporting organizations,” which have many of the characteristics of private foundations; or open other types of funds, such as ones that support a single nonprofit or issue area. If you want to outsource selecting local nonprofits, you can make a gift to a community foundation for this purpose. Although the PRD categorizes community foundations primarily as funding intermediaries, many have professional staff who can assist donors in their philanthropy.

* The PRD does not include the myriad wealth advisors—who may be associated with independent consultancies, financial advisory firms, or banks—who can also help you navigate your tax strategy to integrate giving into your overall wealth planning.

** A public charity by definition receives a majority of its funding from numerous sources in the general public; a private foundation, on the other hand, typically receives its funding from one source, such as a family or corporation.

Learning About Philanthropy Takeaway

- ➔ The EPLI Philanthropist Resource Directory (PRD) is a compendium of resources that can help donors learn with others and create a supportive giving community.

THE STANFORD PACS

GUIDE

TO EFFECTIVE PHILANTHROPY

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