

Conclusion



Keeping Track of Your Journey

IN THE INTRODUCTION, we referred to philanthropy as a journey—a journey with both anticipated and unexpected experiences and great opportunities for learning. You will almost surely explore new focus areas and find new opportunities within existing ones. More fundamentally, you will develop new skills, more confidence, and greater courage as a philanthropic traveler. Expeditions that once were unthinkably remote and daunting will seem within reach.

In **Chapter 10 on Making Gifts**, we mentioned some easy ways to keep track of your gifts. Here we suggest that you put your gifts in a broader perspective by keeping a journal of your philanthropic journey, noting things such as:

- What is the current composition of my collection or portfolio of grants with respect to:
 - » focus areas
 - » unforeseen emergencies, opportunities, and requests
 - » size of grant
 - » duration of grants (i.e., multiyear)
 - » geographies covered
 - » innovative initiatives

- Does my giving have some patterns or themes? What strategies can be discerned from my grants? For example, how much of my portfolio can be described in terms of providing support or moving the needle for effective organizations involved in:
 - » direct services
 - » research
 - » policy advocacy
 - » seeking to create social change through shifts in mindset, behavior, and systems

- For the past year, what were the results of my giving? Looking both at individual grants and my portfolios of grants, how do I feel about:
 - » impact (Did I make the world a better place?)
 - » progress toward my intended goals
 - » any unintended positive or negative effects

- What did I learn this year about grantmaking and philanthropy more generally?
 - » What particular moments of joy or satisfaction did I have and why?
 - » What problems have I encountered and why?
 - » What skills or knowledge did I acquire or improve?

- Were there any external changes that might lead me to change direction, expand my reach, or retreat from my giving? Consider:
 - » larger political, economic, health, or environmental trends
 - » new relationships, obligations, or introduction to networks
 - » emerging opportunities to create greater change or experiment in new areas
 - » changes in my personal view of the world

- Going forward, what would I do differently?
 - » Adjust current goals?
 - » Seize new opportunities?
 - » Adjust the mix of my grants to reflect changes in the external environment?
 - » Re-invest in existing organizations, programs, and activities?
 - » Try new approaches or fund new organizations?
 - » Change my grant strategy/structure?

You might consider writing in this journal annually. This will give you an opportunity to reflect on your past giving and consider what, if anything, you would like to do differently in the coming years. Depending on how you would like to involve your family now and in the future, the journal can provide both a record of your work and an opportunity for a family conversation.

Arguments About the Ends and Means of Philanthropy

You are undertaking this journey at a time when philanthropy is the object of scrutiny and criticism and when commentators are moralizing both about which goals you should pursue and how you may pursue them.

Earlier, we mentioned William MacAskill's *Doing Good Better: How Effective Altruism Can Help You Make a Difference* (2015), which like Peter Singer's *The Most Good You Can Do: How Effective Altruism Is Changing Ideas About Living Ethically* (2016) exhorts philanthropists to devote their resources to helping the world's poorest people—most of whom reside in developing countries—and averting global catastrophes such as climate change, nuclear war, and pandemics.

Counterbalancing this are arguments, for example by Alexa Culwell and Heather McLeod Grant in *The Giving Code: Silicon Valley Nonprofits and Philanthropy*, that you should support local community organizations. And, of course, we all have heard persuasive cases for funding universities and other institutions that promote research, the arts, and humanities. It is beyond the scope of this *Guide* to mediate among these positions, all of which have merit.

We do, however, have views about the restrictions that commentators would impose on *how* you pursue your goals. William Schambra,⁹⁷ Bill Somerville,⁹⁸ and, more recently, some social justice advocates⁹⁹ assert that philanthropists should get out of the way and leave funding

decisions to the communities themselves. To the extent that this reflects the importance of listening to the voices of beneficiaries and other stakeholders, we entirely agree. But if it means abdicating choice, it is irresponsible and self-deluding.

We also have views about two broad-ranging critiques of philanthropy: Rob Reich's *Just Giving: Why Philanthropy Is Failing Democracy and How It Can Do Better* and Anand Giridharadas' *Winners Take All: The Elite Charade of Changing the World*, both published in 2018. Reich, a political philosopher and our colleague at Stanford PACS, makes reasoned arguments against the current charitable contributions deduction and the plutocratic power that wealthy donors exercise. He argues for tax policy reform that would replace the deduction with a flat capped tax credit, and he would increase the scrutiny of donors' projects and restrict their scope. Giridharadas, a writer and polemicist, asserts that these same plutocrats support incremental solutions but are unwilling to advocate for significant reforms of the core structures that sustain their wealth and power.

Ironically, Reich and Giridharadas come to the same conclusion about philanthropic support for ongoing social programs, say, to reduce drug addiction, homelessness, or recidivism. Giridharadas dismisses these as Band Aids. Although Reich encourages philanthropists to pilot novel approaches to social problem-solving, he would not allow them to scale successful experiments—say, along the lines of Blue Meridian Partners¹⁰⁰—if governments are unable or unwilling to do so. He argues that deciding which programs to support at which scale is a decision that should be made democratically, not plutocratically.

Also ironically, Reich and Giridharadas end up in the same place about advocacy. Giridharadas' quotation of Audre Lord's insight that "the master's tools will never dismantle the master's house" reflects his understandable skepticism that plutocrats will press for fundamental system change. For his part, Reich prohibits philanthropists from advocating for policy change because their exercise of plutocratic power undermines the value of political equality at the heart of democracy.

The authors of this *Guide* would not remove support for successful programs or advocacy from the philanthropist’s toolkit. There are many reasons—ranging from budgetary constraints to indifference to the wellbeing of some groups—that governments may not scale even highly successful programs.

With respect to advocacy, consider the crucial roles that philanthropy has played in the adoption of the Affordable Care Act; obtaining equal treatment of people of color, women, and LGBT people; and the beginnings of criminal justice reform. We appreciate Reich’s concerns about plutocratic power. But one cannot view the exercise of this power abstracted from its actual history or independently of other actors in society. Imagine, for example, if philanthropists were prohibited from advocating policies to mitigate climate change, while oil companies were free to continue to use corporate earnings to advocate against such policies.

Philanthropy in the Current Crisis

We are putting the finishing touches on this *Guide* at a time when the world is in the early stages of a global crisis of unprecedented magnitude. No one has been spared from the dire consequences of the COVID-19 pandemic—least of all the world’s most vulnerable populations who already are afflicted by poverty, abuse, discrimination, forced migration, and disease.

Many of us feel the imperative to act—but how and where? Among other things, we want to know how best to support our current grantees and beneficiaries, whether to postpone long term philanthropic goals to address immediate problems, and whether to increase our charitable giving even if this requires “borrowing” against future years’ philanthropic budgets. We found helpful guidance on some of these and other issues in the Council on Foundations’ *Pledge*, which at the time of publication, almost 600 foundations had signed in support.

[cof.org/news/call-action-philanthropys-commitment-during-COVID-19](https://www.cof.org/news/call-action-philanthropys-commitment-during-COVID-19)

Over the days, weeks, and months ahead, each of our foundations pledges to:

- Loosen or eliminate the restrictions on current grants. This can include: converting project-based grants to unrestricted support; accelerating payment schedules; and not holding grantees responsible if conferences, events, and other project deliverables must be postponed or canceled.
- Make new grants as unrestricted as possible, so nonprofit partners have maximum flexibility to respond to this crisis. We will also support organizations created and led by the communities most affected that we may not fund currently.
- Reduce what we ask of our nonprofit partners, postponing reporting requirements, site visits, and other demands on their time during this challenging period.
- Contribute to community-based emergency response funds and other efforts to address the health and economic impact on those most affected by this pandemic.
- Communicate proactively and regularly about our decision-making and response to provide helpful information while not asking more of grantee partners.
- Commit to listening to our partners and especially to those communities least heard, lifting up their voices and experiences to inform public discourse and our own decision-making so we can act on their feedback. We recognize that the best solutions to the manifold crises caused by COVID-19 are not found within foundations.
- Support, as appropriate, grantee partners advocating for important public policy changes to fight the pandemic and deliver an equitable and just emergency response for all. This may include its economic impact on workers, such as expanded paid sick leave; increasing civic participation; access to affordable health care; and expanded income and rental

assistance. It should also include lending our voices to calls to action led by grantee partners, at their direction and request.

- Learn from these emergency practices and share what they teach us about effective partnership and philanthropic support, so we may consider adjusting our practices more fundamentally in the future, in more stable times, based on all we learn.

Parting Advice

Governments are making valiant efforts to respond to the COVID-19 crisis. But, to quote a recent study, “despite the clear efficiency of investing in preparation rather than response, prevention spending has decreased over the decades—while response spending has increased.”¹⁰¹ While prevention is clearly a government responsibility, the authors note that voters do not reward politicians for prevention measures. But what about philanthropists and their foundations, who do not stand for reelection or reauthorization every few years?¹⁰²

David Callahan, a savvy observer of our sector, notes that “a value-add of philanthropy is that it can pay attention to issues that aren’t on the minds of voters and politicians, and also won’t be addressed by the market. Foundations are supposed to be good at playing the long game to make the world a better place, peering around corners and over the horizon. But that hasn’t happened here, despite decades of warnings that a pandemic would inevitably arrive on America’s doorsteps, with deadly effects.”

There are several important exceptions: both the Open Philanthropy Project and the Gates Foundation have supported work in biosecurity.¹⁰³ But Callahan’s observation is essentially correct. It may be explained in part by philanthropists’ being subject to the same myopia as the general public—after all, being wealthy doesn’t make one less human! Also, prevention calls for philanthropic risk-taking with rewards that are at best

ambiguous. “Success” means that something doesn’t happen or happen so disastrously. Whatever one’s own philanthropic goals, Cari Tuna and Dustin Moskovitz of the Open Philanthropy Project and Bill and Melinda Gates should be celebrated for their foresight.

For readers who lack the strategic resources or risk tolerance to undertake measures like these, there are near-infinite needs in the immediate days and months. Our friend and colleague, Kathy Kwan, describes her family foundation’s values and priorities:

- Be clear about priorities: For us, the immediate focus is on the COVID-19 crisis and associated economic consequences.
- Have a propensity for action: Any help is better than no help.
- Be flexible and reasonable: Don’t expect overwhelming amounts of information, justification, and attention. Many nonprofit leaders are slammed with increased demand for services and/or the need to reconfigure services and core operating processes.
- Work with existing partners and honor prior commitments: Where appropriate offer mid- to long-term options that may help with sustainability.
- Take incremental steps: This situation is beginning to look like a 2- to 3-year marathon. Think about, plan, and execute strategies beginning now and over this period.
- Without being presumptuous, model funding activities in the hopes of encouraging others.

When, in the introduction to this *Guide*, we quoted from a poem about Odysseus’ twenty-year journey, we had no idea that our collective journey would be at least as perilous as his. Even when this immediate crisis is over, its aftermath may well endure that long and the beneficiaries of your philanthropy will need your support more than ever.

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Dear Reader:

We hope you have found this *Guide* both informative and useful as you continue to explore the possibilities of philanthropy. “So what now?”, you may ask.

We invite you to engage directly with our team here at Stanford PACS.

Contact Us

We welcome and encourage readers to contact us with feedback, suggestions, and personal stories from your own philanthropic journey.

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