



Project	Activities	Intermediate Outcomes	Ultimate Outcomes
Research – Giving Vehicles	<p>Conduct research to understand how high-capacity, emerging donors in the Bay Area choose among giving vehicles and use them in their philanthropic practice.</p> <p>Write and publish report(s) to be shared with target audiences and the broader public.</p> <p>Convene relevant stakeholders to share and discuss the results and encourage conversation around any identified problems.</p> <p>Build relationships with individuals and organizations who support our research.</p>	<p>Wealth advisors, philanthropy advisors, individual donors, DAF sponsors, and nonprofit leaders read the report and modify their practices and/or recommendations to better support donors and nonprofits.</p>	
Research – Community Wealth Partners	<p>Conduct research exploring how donors decide which organizations to support and how to appropriately support them.</p> <p>Make recommendations about how to better support community-based organizations.</p> <p>Write and publish report(s) to be shared with target audiences and the broader public.</p> <p>Build relationships with individuals and organizations who support our research.</p>	<p>Individual donors, philanthropy advisors, and nonprofit leaders read the report and adhere to the suggestions.</p>	<p>Individual donors give more strategically</p>
Research – Donor Advised Fund Policy Lab	<p>Study the advantages and disadvantages of Donor Advised Funds.</p> <p>Write and publish report(s) to be shared with target audiences and the broader public.</p> <p>Host a free, public event to share the findings.</p> <p>Build relationships with individuals and organizations who support our research.</p>	<p>Individual donors engage with the materials or the event and learn more about DAFs.</p>	
Research – Donor Advised Fund Sponsors’ Policies	<p>Survey donor advised fund sponsors to understand their policies and practices around service fees, nudge policies, donor anonymity, advice to donors, and more.</p>	<p>Individual donors and nonprofit practitioners understand more about the policies of DAF sponsors so they can make informed decisions about their philanthropy.</p>	



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<p><i>Guide to Effective Philanthropy</i></p>	<p>Publish a comprehensive print and digital guide-book for emerging, high-capacity donors.</p> <p>Actively distribute the <i>Guide</i>.</p>	<p>Individual donors read/download/buy the resource to get un-stuck, craft their strategy, and/or take action.</p>	
<p>The Philanthropy Toolkit</p>	<p>Publish print and online toolkit for high-capacity donors to use themselves and/or with their advisors and families.</p> <p>Develop training and orientation materials (virtual and in-person) aligned with the core principles and practices of Effective Philanthropy(EP).</p> <p>Actively distribute the Toolkit.</p>	<p>Donors and advisors read/download/buy the TK online or offline and understand effective philanthropy.</p> <p>Advisors watch the training videos to understand how to implement the modules with their clients.</p> <p>Advisors attend training sessions to understand how to implement the modules with their clients.</p> <p>Donors and advisors learn about new resources, other ways of giving, peer networks.</p> <p>Donors and advisors are inspired to become effective philanthropists, use the practices and principles in their advisory work and giving.</p> <p>More donors and advisors hold conversations with each other, their families and their peers about one, some, or all of the EP principles and practices.</p> <p>Advisors feel more knowledgeable about philanthropy and more comfortable discussing it with clients.</p>	<p>Individual donors give more strategically</p>
<p>Philanthropist Resource Directory (PRD)</p>	<p>Build a searchable database of donor support organizations.</p> <p>Share the resource through our website and Giving Compass website.</p> <p>Cultivate relationships with donor support organizations.</p> <p>Distribute EPLI resources to DSOs.</p>	<p>Donors will use the resource to learn about donor support organizations (DSO) and join them.</p> <p>Donor support intermediaries will share the resource with their clients. DSOs share EPLI resources with their clients.</p> <p>DSOs adopt EPLI resources to teach effective philanthropy principles and practices.</p>	



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<p>Education for Philanthropy Professionals/Donors</p>	<p>Develop and implement a robust, comprehensive curriculum about effective philanthropy principles and practices based on the <i>Guide</i> to teach emerging family office staff and philanthropists.</p> <p>Develop a template for other philanthropy education programs.</p> <p>Write and publish a report about our education program.</p>	<p>Family office staff and emerging philanthropists enroll in the course, learn new information to enhance their practice, and implement effective philanthropy practices in their work.</p> <p>Philanthropy educators read the report and update their programs based on our learnings.</p>	<p>Individual donors give more strategically</p>
<p>Online Course on How to Develop & Implement a Strategy for Social Change</p>	<p>Develop an online course in collaboration with the Graduate School of Business' Center for Social Innovation.</p>	<p>Social entrepreneurs, nonprofit organizations, students, and philanthropists learn how to construct and evaluate a nonprofit strategy.</p>	
<p>Workshops</p>	<p>Deliver short-form, effective philanthropy education to a variety of relevant stakeholders: philanthropists, nonprofit leaders, advisors, and other intermediaries.</p>	<p>Program attendees learn new information to enhance their practice and implement effective philanthropy practices in their work.</p>	
<p>Website</p>	<p>Publish an easy-to-use website to share information about EPLI with the world.</p> <p>Make EPLI research articles free and available to the public.</p> <p>Publish a directory of philanthropic support organizations that the public can easily use to search for Donor Support Organizations.</p> <p>Make the <i>Guide</i> and Toolkit easy to purchase and download (for free) on the website.</p> <p>Design/Prototype/Refine EPLI core principles/practices for optimal online learning experience.</p> <p>Make Toolkit training modules accessible online.</p> <p>Make available a list of EPLI events for the public to attend.</p>	<p>Users access our research, publications, resources, and educational services to further their philanthropic practices.</p> <p>Individual donors, philanthropy advisors, and nonprofit leaders use the site to gain insight on effective philanthropy practices.</p>	