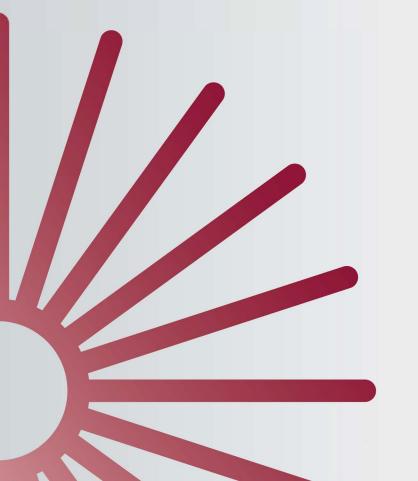
PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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EPLI PHILANTHROPY PLANNER ENGAGING OTHERS SUMMARY

INSTRUCTIONS

Reflect on the considerations for collaborating with other donors. If you answer "yes" on any item, use the notes at the bottom of this page to jot down any considerations you may have in moving forward.

ARE YOU WILLING TO INVEST THE TIME TO:	YES SHORT TERM	YES LONG TERM	NO
Learn more about your selected issue area?			
Learn from philanthropists working on your selected issue?			
Learn from philanthropists in your geographic location?			
Build the relationships of trust necessary for effective collaboration?			
DO YOU WANT TO SHARE WITH OTHER PEER DONORS:			
Lessons you learn in your philanthropy about promising giving practices or warning signs?			
Decision-making in your philanthropy?			
Your philanthropic legacy?			
Your personal networks, skills, and expertise?			
DO YOU WANT TO PARTNER WITH OTHER PEER DONORS TO:			
Scale an initiative?			
Elevate voices from communities affected by your issue(s) and provide space for their leadership?			
Increase your influence on key stakeholders?			
Expand the skills and networks available to your philanthropy?			
Pilot a new initiative?			

EPLI PHILANTHROPY PLANNER ENGAGING OTHERS SUMMARY

INSTRUCTIONS

Reflect on what you've read about the different levels of participatory grantmaking. Jot down any concerns, considerations, or open questions.

Note: You may choose to engage in participatory grantmaking practices in all your philanthropic activities or only in some instances, around particular issues or organizations.

WOULD YOU LIKE TO DO A LISTENING TOUR ON A FOCUS AREA?	YES	NO O		
With whom might you want to speak (staff, community members matter experts)? Are you giving at a level commensurate with the you are requesting from people? Are you open to giving an honor you are asking for their dedicated time?	time and atte	ention		
ARE YOU INTERESTED IN INCORPORATING GRANTEE AND COMMUNITY VOICES IN YOUR PHILANTHROPIC DELIBERATIONS?	YES	NO O		
Which people might you be interested in having around the table as a slightly more formalized advisory group while you deliberate about what kind of projects to support and how? What diversity, equity, and inclusion opportunities become possible with this approach? Do you need additional information to take this step?				
ARE YOU INTERESTED IN GIVING GRANTEE LEADERS OR COMMUNITY MEMBERS DECISION-MAKING POWER OVER ALL OR SOME PORTION OF YOUR DONATIONS?	YES	NO O		
How would you want a delegated decision-making entity to communicate their process and decisions with you? Who might you want to see involved in this collaborative group? What concerns do you have about this? What structures, level of formality, and commitments would you want to see to make this feasible?				

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INSTRUCTIONS

Once you have completed the survey, look back at the Spectrum of Collaboration in Section 2 to see which approaches, if any, might suit your current interests in collaboration. Then, think through the questions below.

SHORT-TERM APPROACH	
What approach would you	
like to take to collaboration over the next cycle of your	•••••••••••••••••••••••••••••••••••••••
philanthropy?	
LONG-TERM APPROACH	
What approach would you like to take regarding collaboration	
over the next 5–10 years?	
METHODS OF COLLABORATION	
What are some concrete ways you would like to collaborate	
with others, in the short and long term?	
long term:	
ACTION STEPS	
What steps do you need to take to move forward?	