

THE 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?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn from philanthropists working on your selected issue?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn from philanthropists in your geographic location?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build the relationships of trust necessary for effective collaboration?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DO YOU WANT TO SHARE WITH OTHER PEER DONORS:			
Lessons you learn in your philanthropy about promising giving practices or warning signs?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Decision-making in your philanthropy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your philanthropic legacy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your personal networks, skills, and expertise?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
DO YOU WANT TO PARTNER WITH OTHER PEER DONORS TO:			
Scale an initiative?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Elevate voices from communities affected by your issue(s) and provide space for their leadership?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increase your influence on key stakeholders?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expand the skills and networks available to your philanthropy?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pilot a new initiative?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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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

With whom might you want to speak (staff, community members or other subject matter experts)? Are you giving at a level commensurate with the time and attention you are requesting from people? Are you open to giving an honorarium to people if you are asking for their dedicated time?

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ARE YOU INTERESTED IN INCORPORATING GRANTEE AND COMMUNITY VOICES IN YOUR PHILANTHROPIC DELIBERATIONS? YES NO

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?

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ARE YOU INTERESTED IN GIVING GRANTEE LEADERS OR COMMUNITY MEMBERS DECISION-MAKING POWER OVER ALL OR SOME PORTION OF YOUR DONATIONS? YES NO

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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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?

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LONG-TERM APPROACH

What approach would you like to take regarding collaboration over the next 5-10 years?

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METHODS OF COLLABORATION

What are some concrete ways you would like to collaborate with others, in the short and long term?

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ACTION STEPS

What steps do you need to take to move forward?

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