

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

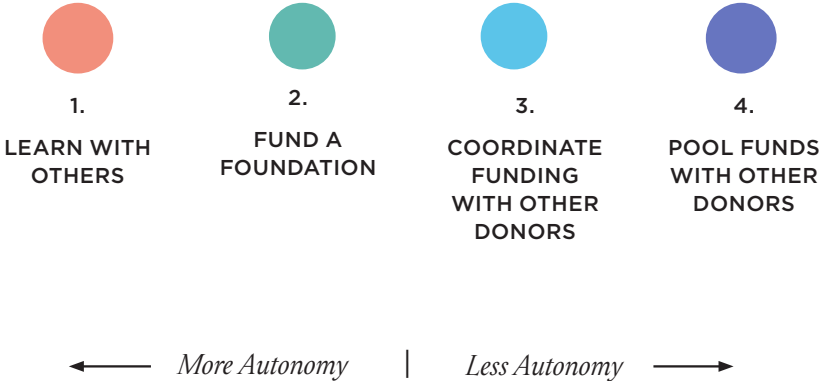
THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE







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SPECTRUM OF COLLABORATION

The diagram below represents four ways donors can collaborate. Note how each method of collaboration has different implications for your decision-making autonomy.



| WAYS TO COLLABORATE | WHAT IS IT? |
|--|---|
|  <p data-bbox="362 548 524 600">LEARN WITH OTHERS</p> | <p data-bbox="615 457 1247 512">The exchange of knowledge among donors is the most common form of collaboration.</p> <p data-bbox="615 548 1263 600"><i>Examples: joining an affinity group and sharing “lessons learned” with other donors.</i></p> |
|  <p data-bbox="362 842 524 894">FUND A FOUNDATION</p> | <p data-bbox="615 688 1256 779">You can entrust your funds to another well-established funder, usually a private or community foundation, that has full control over its grantmaking and is fully staffed.</p> <p data-bbox="615 810 1268 957"><i>Examples: One well-known example is Warren Buffett’s unrestricted gift of \$30 billion to the Bill and Melinda Gates Foundation in 2006. There are also other foundations that depend heavily on contributions—for example Tipping Point Community and GreenLight Fund, which respectively address poverty and inequality.</i></p> |
|  <p data-bbox="350 1209 535 1289">COORDINATE FUNDING WITH OTHER DONORS</p> | <p data-bbox="615 1041 1260 1188">Donors may choose to coordinate funding strategies within their focus areas. They can identify opportunities to support one another’s work, reduce areas of unnecessary overlap, and strategize together about how to address a specific problem.</p> <p data-bbox="615 1220 1268 1367"><i>Example: GlimateWorks brings together its core partners—the William and Flora Hewlett Foundation, the KR Foundation, the John D. and Catherine T. MacArthur Foundation, the Oak Foundation, and the David and Lucile Packard Foundation—to strategize and fund collective action to tackle the causes of climate change.</i></p> |
|  <p data-bbox="370 1593 516 1673">POOL FUNDS WITH OTHER DONORS</p> | <p data-bbox="615 1472 1268 1562">Donors can aggregate, or pool, funds with each other to create larger-scale impact in a shared focus area. Entities that have a thematic focus are known as issue funds.</p> <p data-bbox="615 1593 1268 1709"><i>Example: Hundreds of issue funds exist, covering a wide range of topics such as animal welfare, movement building, poverty alleviation, human rights, clean water, hunger relief, youth homelessness, and many more.</i></p> |

| WAYS TO PRACTICE PARTICIPATORY GRANTMAKING | WHAT IS IT? |
|--|---|
| <p>1.</p> <p>LISTENING TOUR</p> <p>Survey the communities you seek to serve</p> | <p>Donors seek out nonprofit and community opinions and perspectives to learn about the issues they are trying to tackle.</p> <p>This approach to participatory grantmaking allows donors to retain control of their philanthropic process.</p> <p><i>Example: Donors ask a wide range of nonprofit staff or community members about their experiences around a particular issue.</i></p> |
| <p>2.</p> <p>SEAT AT THE TABLE</p> <p>Incorporate grantee and community voices into your philanthropic process</p> | <p>Donors include nonprofit or community perspectives to inform their philanthropic strategy.</p> <p><i>Example: A giving circle focused on girls' education in Southern California has an advisory board of teenage girls from the region.</i></p> |
| <p>3.</p> <p>ACTIVE PARTNERSHIP</p> <p>Collaborate with communities or nonprofits to carry out your philanthropic process</p> | <p>Donors give nonprofits and communities increased decision-making power to direct philanthropic resources. This level of partnership can be very rewarding but generally requires trust and deeper connections built over time.</p> <p><i>Example: A foundation creates a regional advisory board of community experts to make decisions about which nonprofits to fund.</i></p> |

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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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

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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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?

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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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