Stanford PACS
Center on Philanthropy and Civil Society

Effective Philanthropy Learning Initiative

WORKSHOPS & CUSTOM ENGAGEMENTS

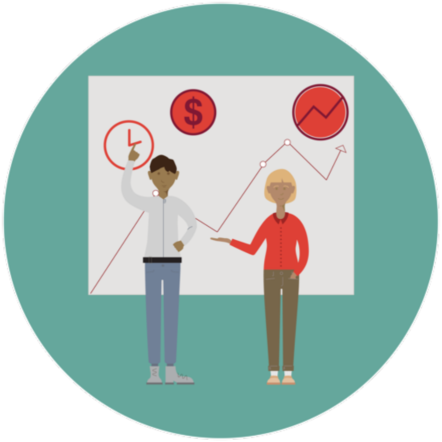
This document provides a brief overview of the Effective Philanthropy Learning Initiative (EPLI), and outlines the educational workshops and custom engagements we currently offer for donors, advisors, associations, nonprofits, and companies interested in effective philanthropy. Whether you are interested in a 30-minute introductory program, a series of 1-hour lunch & learns, or in-depth workshops, we hope you find something that aligns with your goals. Thank you in advance for sharing our commitment to elevate philanthropic practice in the United States and around the world.

OUR MISSION

The Effective Philanthropy Learning Initiative at the Stanford Center on Philanthropy and Civil Society (Stanford PACS) conducts research, develops resources, and teaches to help high-capacity donors become more effective, strategic philanthropists.

We are an interdisciplinary team working at the intersection of strategic philanthropy and the social and behavioral sciences to accelerate learning for donors and relevant actors in the donor-support ecosystem—so they can make more informed, values-based, outcome-focused decisions, thereby increasing their philanthropic impact.

APPROACH



Research

Resources

Education

EPLI conducts basic and applied research in four areas: **donor behavior** and motivation, **emerging donors**, **cultures of giving**, and **contemporary issues and philanthropy**. Specifically, EPLI's research investigates the behavior and philanthropic practices of high-capacity donors, as well as ways that high-capacity donors shape and are shaped by the societies and cultures in which they live.

In partnership with foundations and intermediaries, EPLI curates and develops **resources**, **tools**, and **prototypes** to help high-capacity donors increase the effectiveness of their philanthropy. All digital resources designed by EPLI are available free of cost and published through Creative Commons licenses.

EPLI offers in-person and virtual **workshops**, **online courses**, and other **educational resources** to philanthropists and intermediaries.

EFFECTIVE PHILANTHROPY: TRAININGS & WORKSHOPS

Note:

- For custom engagements we work with organizers to determine goals, topics of most interest, optimal discussion and interactivity levels.
- All sessions include an overview of the main resources and Effective Philanthropy Core Concepts. In the longer sessions we dive into these topics, and have more time for activity and discussion.
- Interactive polls, activities, and discussions are sprinkled throughout the programs.
- Homework is optional, depending on the group (before, between, or after the session/s).
- We are also available after the core program for live follow up “bonus sessions” for participants.

<table>
<tr><th>1 HOUR PROGRAM</th><th>2 HOUR PROGRAM</th><th>3-5 HOUR PROGRAM</th></tr>
<tr>
<td>Stanford PACS + EPLI Overview
Main Tools & Resources (Toolkit, Guide, Philanthropist Resource Directory, Research)
Audience Polls (experience in philanthropy, participant goals & interests, etc.)
1 Module & Activity (Finding Your Focus)
Final Q&A</td>
<td>SESSION 1: Why & Who
Stanford PACS + EPLI Overview
Overview of Main Tools & Resources
Audience Polls
1-2 Modules & Activities (1-2 of the following: Finding Your Focus, Family Dynamics, Engaging Others)
Q&A
Light homework
SESSION 2: What & How
Welcome Back / Agenda
Homework discussion
Audience Polls
1-2 Modules (1-2 of the following: Finding & Vetting Organizations, Structuring Giving, Making & Tracking Gifts)
Final Q&A</td>
<td>SESSION 1: Why & Who
Stanford PACS + EPLI Overview
Overview of Main Tools & Resources
3 Full Modules & Activities (Finding Your Focus, Family Dynamics, Engaging Others)
Q&A
Light homework
SESSION 2: What & How & Sector Trends
Welcome Back / Agenda
Homework discussion
Audience Polls
3 Full Modules (Finding & Vetting Organizations, Structuring Giving, Making & Tracking Gifts)
Stanford Research - Topics, Findings, Trends
Final Q&A</td>
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<tr>
<td>Custom engagement only at this time.</td>
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<td>Available as custom engagement, or offered 3-4x/year as a regular live program with our partners at Advisors in Philanthropy (AiP). C/E credit and a Statement of Accomplishment available for the AiP workshop participants. Some groups attend the AiP workshop to see the program in action before requesting a custom engagement.
https://www.advisorsinphilanthropy.org/page/AiP-EPLI-Workshop</td>
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</table>

SAMPLE 2-HOUR CUSTOM PROGRAM

Client: National Advisory company with wealth advisors, tax & estate attorneys, philanthropic advisors

Participants: 25-40

Timing: Program designed to be delivered as 2 one-hour "lunch & learns" either one or two days or a few weeks apart

SESSION 1: WHY & WHO?
FINDING YOUR FOCUS, FAMILY DYNAMICS, ENGAGING OTHERS

(60 minutes)

1.INTRO / WELCOME

- About Stanford EPLI
- The 3 main tools, focus on the Toolkit
- Overview, agenda & goals for 2 sessions
- Video: What is Effective Philanthropy?

2. CONVERSATION STARTERS FOR ADVISORS

- **ACTIVITY:** Quick Pulse Poll
- Client Types
- Conversation Starters for Advisors
- **ACTIVITY:** Breakouts & Facilitated Conversations

3. FINDING YOUR FOCUS

- **ACTIVITY:** Quick Pulse Poll
- **ACTIVITY:** Finding Your Focus Exercise (Values, Issues, Focus Statement)
- **ACTIVITY:** Q&A

4. FAMILY DYNAMICS & ENGAGING OTHERS

- Family Roles
- Ways to Collaborate
- **ACTIVITY:** Q&A

5. CONCLUSION

- **ACTIVITY:** Brief Feedback Poll
- Next Session Overview: HOW & WHAT
  Modules: choosing giving vehicles, finding & vetting organizations, tracking gifts
- Homework setup

SESSION 2: HOW & WHAT?
FINDING & VETTING ORGANIZATIONS, GIVING EFFECTIVELY, TRENDS + RESEARCH
(60 minutes)

1.WELCOME + HOMEWORK REVIEW

- Welcome back + Agenda review
- **ACTIVITY:** Quick Pulse Poll
- **ACTIVITY:** Facilitated Homework conversation

2.FINDING & VETTING ORGANIZATIONS

- How can you help donors find great organizations without getting overwhelmed?
- 5 ways to find effective organizations
- Donor Case Study
- Highlights
    - Getting Beyond Your Bubble
    - What's the role of the advisor in the finding & vetting stage of the journey?
    - LINKS:
        - Online research tips
        - Examples: Landscape Analysis, Knowing How an Organization Achieves its Outcome, Due Diligence of One Organization from Shortlist
        - Notes on Shortlisting and Measurement/Evaluation
- **ACTIVITY: Q&A**

3.STRUCTURNG GIVING

- High-level walk through of materials in toolkit – simply give sense of materials
- Giving vehicle chart, donor-advised funds do's/don'ts

4.MAKING & TRACKING GIFTS

- Types of Gifts
- Importance of Records – Gift, Type, Amount, Frequency, Vehicle, Etc.
- Trust-based philanthropy
- **ACTIVITY:** Q&A

5.RESEARCH / TRENDS

- Trends and tensions in philanthropy, how it ties to the historical moment and how this is playing out in each of these phases of the philanthropic process. High-level recap of what's happening in the field so advisors can talk knowledgeably with clients about these topics.

6.CONCLUSION

- In-session survey
- Next steps for group - discussion at next team meeting