

FIRST STEPS

in the Philanthropic Journey

Rockefeller Philanthropy Advisors (RPA) is a nonprofit organization that currently advises on and manages more than \$250 million in annual giving by individuals, families, corporations, and major foundations. Headquartered in New York City with offices in Los Angeles, San Francisco and Chicago, it traces its antecedents to John D. Rockefeller, Sr., who in 1891 began to professionally manage his philanthropy "as if it were a business." With thoughtful and effective philanthropy as its only mission, Rockefeller Philanthropy Advisors has grown into one of the world's largest philanthropic service organizations and as a whole has facilitated more than \$3 billion in grantmaking to nearly 70 countries. RPA's diverse staff of 37 is led by experienced grantmakers with significant depth of knowledge across multiple issue areas.

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A Design for Giving

Charitable giving can—and should—be a source of great personal satisfaction for donors who use their resources to support organizations doing important work. It can also be a complex process with seemingly endless options in approach, strategy, and execution.

In creating a plan for giving, donors are faced with decisions about areas of interest, type of grant, length of commitment, and desired impact. In order to ensure that your philanthropy is meaningful and rewarding, it is important to examine your goals, style, and values to find the approach that will work best for you.

The purpose of this overview is to help donors achieve their desired impact through charitable giving. By exploring your motivations and commitments, in consultation with trusted advisors, you can develop the kind of relationships with nonprofit organizations that will fulfill your philanthropic goals.

The nine steps described below will guide you through a thoughtful design process that engages your mind, your heart, your family and friends, and your community—however you define that. But while these steps provide some direction, the design process is by no means cut and dried. At every juncture, you'll find that you need to strike a balance between certainty and exploration; between focus and openness; between head and heart. We call these points “philanthropic tensions,” and working through them can be both challenging and rewarding.

In order to ensure that your philanthropy is meaningful and rewarding, it is important to examine your goals, style, and values to find the approach that will work best for you.

Step 1: Do some homework

Reflect on your interests and the kinds of organizations you most admire. What are the issues or areas of charitable work that most attract you? This exploration can be informed by your past experiences, stories you see in the news or hear from others, the thoughts and insights of friends, family and colleagues. It is also helpful to read articles or reports that deepen and expand your understanding of the issues you might want your philanthropy to address.

The areas you choose to focus on could be geographical, related to certain populations or cultures, broad social issues, or specific topics of research or advancement. As you engage in this process, keep in mind that many donors design their giving to reflect a variety of personal motivations—the what and why of giving—such as:

- ❖ **FAMILY LEGACY AND HERITAGE** family history or cultural background; cities, regions, or issues that have been important to older or younger generations.
- ❖ **CAUSES OR AFFILIATIONS** specific concerns or activities you have been touched by or involved with, as well as others that you might want to associate with for the first time or deepen your connection to.
- ❖ **VALUES** the social, cultural, political, or artistic issues that you want to promote through your support.

As you explore the program areas that interest you, it will be helpful to talk with other donors or key organizations in those fields. Donors can share their own experiences and lessons learned, which will help guide your inquiry. Look for opportunities—open houses or other public events—to visit local nonprofits involved in issues of interest to you in order to learn more about how they do their work and to see their programs in action.

As you consider reaching out to other donors or visiting nonprofits, you may decide to take these steps yourself, or ask a trusted advisor or associate to make the initial contacts on your behalf. If you aren't ready to identify yourself as a potential donor, sending someone else can allow you to do some exploratory research without inadvertently implying a commitment of support.

CASE STUDY:

Finding the giving approach that works best for you

When establishing a new family foundation, members of this particular family examined their own heritage and values to determine their approach to giving. They reflected on their family's experience as immigrants who found success in New York. One of their core values was helping people realize their dreams through opportunities and hard work. Strengthening families and providing for the less fortunate in New York City became a key focus area.

The family structured a giving program to support this approach. They decided to include two generations of the family on the board, to emphasize their legacy and future. They also created a program committee comprised of the family's youngest generation. The committee members visited some organizations the foundation considered for support, and reported their findings to the board. The family decided to make small grants to relatively small organizations that work directly with the less fortunate to help them improve their lives. This structure reflected the family's most important values and their key goals for giving.

Step 2: Take your temperature

Once you have reflected on the motivations for your giving and the areas and organizations that match your values, there are a series of questions for donors to consider about the structure of their giving and their level of involvement.

1. What role do you want to play in solving a problem? Do you want your giving to shine a spotlight on an issue or cause that you believe is not getting enough attention? This may lead you to be a “first” or “early” funder for an organization. Do you want to provide the all-important last piece of the funding puzzle or “tipping point” money to help a project move ahead?
2. How much do you want to give? What is your total annual giving goal, and how much do you want to give to individual organizations?
3. How many organizations do you want to support in a year?
4. How much of your time and personal involvement do you want to devote to the organizations you support?

5. How long an investment do you want to make in organizations? Over what time period will you commit your support?
6. What kinds of results will feel like success to you? What impact do you want your giving to have?

Once you have answered these questions, it will be easier to stick with your giving plan, and avoid responding to immediate charitable opportunities that may fall outside your areas of interest or desired giving structure.

During this step, you can also refine or sharpen your areas of interest or the types of organizations you want to support. As you learn more about your areas of interest, you may identify specific opportunities to achieve results. For example, if you want to help improve community healthcare services in your city, you might decide that a significant grant to a clinic that is raising funds to purchase a new mobile healthcare station is the best way to promote that goal.

PHILANTHROPIC TENSION

While it may be desirable to make a gift that has an immediate and quantifiable impact on an organization's work, this might not create the lasting change you want. By providing long-term support that helps organizations address the root causes of problems, you may be more likely to bring change.

CASE STUDY:

Giving proactively

During a family retreat, a family that was creating a new foundation considered how it wanted to learn about organizations that work in their fields of interest. Education, the environment, and human rights were the issues that resonated with family members, but they wanted to think carefully about how to identify which groups to support.

They decided that it was important to them to be proactive in their giving, by identifying entrepreneurial organizations that could expand their work with long-term support, and by networking with other donors with similar interests. They chose to use their knowledge and skills in their key issue areas to actively seek out those organizations that advance their fields. Continued learning and exploration will be important as the family develops its proactive approach to giving.

Step 3: Form your kitchen cabinet

Put together a group of people you respect, trust and feel comfortable with who can help guide your philanthropic planning. These friends, associates, or advisors should ideally be knowledgeable about or experienced in your area of interest.

Share your findings from Steps 1 and 2 with the kitchen cabinet. Tell them how your thinking about giving in your area of interest has evolved, and which findings or reflections particularly shaped this process. Your goal is to present your plan as a set of ideas in progress, which their input can help to refine. Their views on your giving plan should help you gain further understanding of the field, what is most needed to advance the causes that are important to you, and what can realistically be achieved through your support.

The people you select for the kitchen cabinet should be people with no vested interest in your personal philanthropy. Anyone who tries to pitch their organization or pressure you into following their own agenda should be dropped, as should anyone who offers no insights of their own and simply agrees with everything you say. Your goal at this stage is to get feedback that will help sharpen your goals and areas of interests, not to fend off solicitations for support.

PHILANTHROPIC TENSION

This stage requires a delicate balance between being receptive to new ideas that you may not have considered in Steps 1 and 2 and staying true to the vision you developed on your own. While the views of outsiders and trusted experts can enrich your giving program and may prompt some new areas of exploration, you are the only person who understands your motivations for giving and what you hope to accomplish. You want your giving to have real impact in the field you have chosen, but ultimately, it must also be meaningful to you.

CASE STUDY:

Convening experts to shape your giving

A couple in New York decided to dramatically increase the scale of their charitable giving in improving medical care, but wanted to maintain the focus they had already created. To develop their new giving plan, they identified people with different areas of expertise, and people who knew them and their family in a variety of contexts, for a series of conversations about their fields of interest.

Their informal “kitchen cabinet” included: a hospital president, a university fundraiser, several experts in their fields of interest, the head of a local communal giving fund, a business colleague with an active foundation, major New York City donors, two professional philanthropic advisors—one of whom they eventually hired, and their two children and two grandchildren.

After sharing ideas and viewpoints with this diverse group of people, the couple decided on two specific dimensions of medical care for their expanded giving program: nursing and mental health.

One of these panels still lends shape to their giving: they have developed a formal council of experts to advise on their ongoing contributions to the field of nursing.

Step 4: Choose your approach

Now that you have thought about what you want to fund and how, it’s time to examine the types of organizations and approaches you want to support. What change do you want to promote? What kind of strategy fits your style?

Donors and the organizations they support can have impact in a variety of ways. Here are some strategies that different kinds of organizations pursue to bring change. In these examples, we’ll look at the broad issue of improving public education, and consider how nonprofits that use different approaches address this issue:

- ❖ **POLICY/ADVOCACY** Organizations analyze current education policy, explore alternatives such as charter schools, school vouchers, small schools, or schools for older students, and advocate for policy changes that improve educational services for all students.

- ❖ **RESEARCH** Organizations evaluate different models of public education and publish their findings. They examine pilot projects of new types of schools, curricula, or teaching methodology to measure impact on learning.
- ❖ **GRASSROOTS** Organizations operate in a local community, addressing the needs of families and students in a particular school, neighborhood, or district. This kind of work takes into account the specific population being served and can be very flexible to respond to changing needs or environment. They may provide additional academic tutoring or enrichment to improve student achievement, or support new teachers and help them gain skills and expertise.
- ❖ **NATIONAL** Organizations work on a large scale to improve educational opportunities in many different regions, such as Teach For America, which recruits new teachers for low-income schools, or organizations like New Leaders for New Schools, which develops and supports principals across the country.

Finding the right strategy

All of these types of organizations play a vital role in solving a problem. There is no single “silver bullet” or “right” answer. The challenge is to find the right place for you to enter the problem-solving process.

Donors should consider how involved they want to be with the organizations they choose to support. Think about how often you want to get updates on how your contribution is being used and how the work is progressing. How do you want your relationship with these groups to progress over time—do you want to support them over the long term or change the organizations you support regularly?

Selecting the kind of work you want to support depends on the problem you are trying to solve, how you think it should be addressed, and how you want to be involved. The answer to these questions will constitute your personal theory of change, which is your belief about how you can make a difference with your support.

PHILANTHROPIC TENSION

In determining your approach and grantmaking style, consider the balance between head and heart. For many donors, their charitable contributions stem from the passion they feel for specific issues and the personal satisfaction they get from their giving is more valuable to them than scientific measurement of impact. Donors can recognize the importance of knowledge and research as guiding forces in planning their giving and evaluating its effectiveness, while simultaneously making their personal motivations the animating core of all their charitable work.

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solving process.

CASE STUDY:

Planning your approach through learning

A family was interested in creating a new giving program for its foundation based on environmental health. They engaged a philanthropic advisor to conduct a thorough review of how other funders operated and what kinds of organizations were engaged in this field.

The advisor also organized a full-day educational workshop on environmental health, with experts in the movement teaching the family about their work and new developments.

Armed with in-depth information and a deeper understanding of the issues related to the field, the family created a new giving program based on phasing out toxic chemicals, improving chemical regulation, and the development of safer chemical substitutes. The foundation is now considered a leader in the field, and the family continues its education and research to make learning an ongoing process.

Step 5: Start visiting

At this stage in the planning process, donors usually make initial contact with the organizations they are considering for support. For some, this is the hard part. By “exposing” yourself to the organizations you want to learn more about, you identify yourself as a potential funder, which will affect all of your dealings with the organization’s staff. However, meeting the people who direct the organization’s programs and accomplish its work can add to your knowledge and deepen your understanding of the field. The purpose of this step is to continue the learning that will inform your giving plan, not to make funding decisions at an initial meeting.

Connecting in person with the leadership of an organization you are considering is the most direct way to learn more about its structure, its operations and its accomplishments. You will also get a sense of the organization’s character and culture, which

you may not be able to glean from a website or other marketing materials. However, if you don't want to personally visit the organization, you can ask members of your kitchen cabinet, or more formal philanthropic advisors, to act as your intermediary. Creating a buffer between you and the organizations you are considering for support allows you to learn more about them without implying a funding commitment. Keep in mind, though, that you may miss the chance to see programs in action first-hand.

PHILANTHROPIC TENSION

Nonprofit organizations are very excited to meet prospective supporters of their work. At these initial meetings, it is important to stress that you are gathering information, not making a commitment to give. Keep the communication informal, try to make the meetings easy for the nonprofit, and make it clear how you want to be contacted afterwards.

CASE STUDY:

Creating a giving program while maintaining privacy

The family members on the board of their family's foundation had a strong personal interest in the issue of urban youth violence prevention, and wanted to create a giving program that helped young people at risk of crime and violence. However, they also wanted to keep their giving separate from their personal lives in the community in which they lived.

The family engaged a philanthropic advisory firm to help develop and manage the giving program. The advisors acted on behalf of the family foundation, making contacts with organizations that work with at-risk youth, talking to other donors about their experiences with specific nonprofits, and soliciting proposals from the organizations that best fit the family's interests. They reported back to the family on their findings, and presented a set of recommendations for grants to a small group of organizations.

In this way, the family members could learn about the field, explore the landscape of organizations and donors, and make grants to suitable organizations with anonymity. Their giving was informed by their personal motivations, and with the help of a philanthropic advisor, they could create a giving program while maintaining their privacy.

Step 6: Do the due diligence that's right for you

Once you have identified some organizations that are doing the work you want to support, it's time to look into their operations to make sure they are managed properly. How deeply you want to review each organization depends on a number of factors: the size of the grant you are considering, the length of time you think you will support the organization, the reputation and longevity of the organization, and your own personal comfort level.

Some donors want to know everything they can about how an organization is managed, and some are comfortable with a more general overview of their work and proof of its legal status. Be sure you don't inadvertently place a burden on organizations you want to support by requiring complicated background information that is not readily available.

Here are some common elements of due diligence that you can consider checking out, depending on what's important to you. Most organizations have these materials readily available:

- ❖ At the *minimum*, verify that an organization has been designated with 501(c)(3) tax status, which means that it is recognized by the IRS as an organization that does charitable work. Donations to 501(c)(3) organizations are tax deductible by law. Guidestar is a free online directory of 501(c)(3) organizations that you can use to look up potential grantees: <http://www.guidestar.org>.
- ❖ Budgets: organization and project (if applicable)
- ❖ List of board members
- ❖ Audited financial statements
- ❖ References from other funders or partners in the field

Remember, not all gifts need the same level of scrutiny, especially if you already have some familiarity with the organization in question and are comfortable with their reputation. If you wish to have more detail about how the organization plans to use the funds, you may request a written proposal that outlines activities, goals, and expected results from your support. And if you feel bogged down by the due diligence process, or are unsure of what you should be looking for, get professional help from a trusted advisor.

PHILANTHROPIC TENSION

Deciding how much due diligence you need to feel comfortable also requires a balance between head and heart. Your gifts should support legitimate and reputable organizations, but for many donors, their giving incorporates both reason and emotion. There is always some leap of faith involved in giving money to organizations, so find the balance between careful analysis and personal passion that makes sense for you.

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CASE STUDY:

The role of site visits

A donor was interested in providing new opportunities for children in the New York City neighborhood where he grew up. He received a proposal to his family's foundation from the Trust for Public Land, who intended to create a new playground in an underused schoolyard for the children attending a Bronx elementary school and kids in the surrounding community.

During a site visit to the schoolyard, the donor used his real estate development expertise to suggest new ideas for design and construction, and even identified a new area of the yard that the Trust for Public Land had not originally considered for the playground construction.

By visiting the site he was considering for support, the donor deepened his appreciation and understanding of the project, and made his gift more meaningful and valuable. This level of due diligence gave him a more personal connection to the work, and helped him make important contributions to the project's success.

Step 7: Give the money!

This is the big moment! When you're ready to give your grant, make the transaction as smooth as possible for the nonprofit, and be sure to clearly communicate your expectations. By making grants, you are entering into a relationship with the organizations you support. Think about the kind of relationship you want to establish, and make your wishes clear. Here are a few considerations:

- ❖ Establish how you want to communicate with each organization, and how frequently.
- ❖ What kind of report or information do you want on how your money is used? A written report on the project you supported, or a regular phone call for updates? The organization's annual report? Be sure to ask for the level of communication that will be meaningful to you.

- ❖ Find a way to track all gifts you make, how much, when the gift was made, and when you expect to hear back from each organization. There are database programs available to help with this step.
- ❖ Clarify how public your gift is—can the organization include you in a published list of donors? How do you want to be credited?

If you want the organizations to report back to you, there are several sample formats available through professional philanthropy associations.

PHILANTHROPIC TENSION

Making gifts based on thoughtful planning and reflection can be a deeply satisfying experience. You may feel a sense of completion at this stage, though in another sense, you have only just begun your philanthropic work. As you build relationships with the organizations you support, you will have more opportunities to learn about your area of interest and see the results of your support.

CASE STUDY: Using leverage for impact

A donor hoped to create a loan forgiveness program for graduates of Stanford University's Education school similar to what is already common in law and business schools. She wanted to help new public school teachers pursue their careers without the burden of debt that might prevent them from choosing low-paying public service jobs.

Through a \$10 million grant to Stanford University, Judy Avery and her foundation, the BayTree Fund, created the Stanford Teacher Education Program, which forgives Master-level education students' debt after they have taught in public schools for four years.

The new program was made possible through the BayTree Fund grant, and through a matching \$10 million grant from Stanford. By making a large investment in the educational opportunities she wanted to create, this donor was able to leverage significant funds to make the new program possible. She is hopeful that through the success of this program, other schools will offer similar programs for financial assistance to students pursuing careers in education and public service.

Step 8: Build the relationship and increase impact

Now that you have established expectations for staying in contact with the organizations you support, be sure to check in with them at appropriate times for updates on their work. If you are supporting a particular program or project, you might be in regular contact to track the launch or growth of the project.

BEYOND THE GIFT

Once you have made a financial contribution to organizations, you can also support them in other ways that will strengthen their work and your relationship. Let your peers, colleagues, and associates know about your commitment; voicing your support can help influence other potential funders who share your interests and goals. Consider, as well, partnerships or alliances you can help foster through your different networks.

As your relationship deepens, remember that you are a key ally of the organization. By thinking of yourself as a partner in the work, you can develop a more open and supportive relationship than if you see your role as a critic or evaluator. Expect accountability from the organizations you support, and be accountable to them as an advocate of their work and as a resource for knowledge and networking.

PHILANTHROPIC TENSION

Building a strong relationship with an organization you support is an important aspect of giving, particularly if you plan to support the work over time. Getting involved with the organization is a great way to stay in touch and track progress toward reaching your goals, but avoid becoming too involved in the day to day operations. You are an advocate and an ally, but the effective organizations you support have experienced and professional staff to make management decisions. Be an active supporter, but allow the organization to operate independently.

CASE STUDY:

Building alliances with organizations

A family foundation interested in supporting clean and renewable energy learned of the city of San Francisco's plan to use the tidal motion in the waters of San Francisco Bay to generate energy. After reviewing a proposal, the foundation made a \$200,000 grant to the city to create new technologies, including submerged turbines, to capture the energy generated by tides to generate electricity for the city.

This grant was matched by a grant from the city of San Francisco, which helped attract the support of a much larger funder—power company PG&E, which committed \$1.5 million for research and development of technology to capture tidal energy.

These leveraged funds helped the city's research in harnessing natural forces to create clean technology, which ultimately led to new research that identified wave power as another valuable source of renewable energy. By developing a strong relationship with the city of San Francisco and using their grant to bring in new funders, the family foundation expanded the reach of their gift and supported valuable new research in developing clean energy.

Step 9: Assess your giving annually

A year after your initial contributions, step back and reflect on the gifts you made. You may stay in more frequent contact with the organizations you support, but at least once a year, collect whatever kind of reports, updates, or progress statements you have, and consider how the organization's work matches your goals. Did you accomplish what you hoped for? Did the organizations you support reach their stated goals or make the progress they proposed?

Reflect on the knowledge you have gained from the entire process so far:

- ❖ What new aspects of your area of interest have emerged over the last year?
- ❖ What new developments might you consider as your support evolves over the coming years?
- ❖ What was the most satisfying aspect of your giving?
- ❖ What was disappointing or surprising?

- ❖ Examine what's happening in the field, and allow your philanthropic goals to shift based on your experiences with the nonprofits you support and on any new information that might have emerged.
- ❖ Check back with your kitchen cabinet to discuss any changes in your original assumptions or ideas on how to make change.

REALISTIC EXPECTATIONS

When reflecting on your goals and what you hoped to accomplish, remember to be realistic about what one year of support can bring about. If you plan to be involved in your area of commitment for the long term, pace yourself in the results you hope to see. If you plan to support an organization for three years or fewer, be open about your intentions and work with them to create appropriate measures of the results of your support.

Stay in contact with the organizations you are interested in, both those you have supported already and those you are interested in for future support. If your desired approach or style changes, be sure the organizations you support know about this change. You can restructure your support to nonprofits over time in a way that helps promote your shared goals.

CASE STUDY:

Revamping your giving program

A family foundation had initially chosen the approach of funding research and policy analysis on the issue of urban crime and violence. After several years of giving with this approach, they determined that the issue was still important to them, but they wanted their giving to have more direct impact on the lives of the people affected by violence and crime.

With the help of a philanthropic advisor, the family explored the landscape of local organizations working in the communities they had personal connections to, and identified some groups that demonstrated results in helping to prevent violence. Starting with one or two grants, they modified their giving program to shift from research to direct service for individuals. Over the next several years, they expanded the program to include 8–10 grantees per year doing work that was more meaningful to the family. Through experience, they learned that exploring different approaches to the same issue could enhance their personal connection to their giving.

Conclusions

Creating a giving program that reflects your personal interests and values, and achieves your desired impact, can be a complicated process. Careful reflection on what drives your giving, and clear communication of the goals you want to achieve, will help you align your vision with the work of your grantees. Thoughtful planning that balances knowledge and passion will result in truly meaningful and personally satisfying philanthropy with impact.

RESOURCES

Resources

Networks and Membership Groups for Individual Donors

- ❖ **Association of Small Foundations** (www.smallfoundations.org) Provides targeted resources to members, including access to staff and experts to answer questions, a substantial collection of written materials including “Foundation in a Box,” and over 3,000 peers with whom to share ideas on grantmaking.
- ❖ **Clinton Global Initiative** (www.clintonglobalinitiative.org) A membership group of highly active leaders in diverse fields who seek to find practical solutions to the world’s most pressing and complex problems.
- ❖ **Community Foundations** (www.communityfoundations.net) A website resource for professional advisors, donors, and media representatives; provides information on and connections to the 650 community foundations throughout the United States.
- ❖ **Council on Foundations** (www.cof.org) A membership organization of more than 2,000 grantmaking foundations and giving programs worldwide; provides leadership expertise, legal services and networking opportunities to its members and the general public.
- ❖ **The European Foundation Centre** (www.efc.be) An international association of foundations and corporate funders dedicated to capacity building, enabling a positive legal and fiscal environment for foundations; documenting the foundation landscape; strengthening the infrastructure of the sector; and promoting collaboration, both among foundations and between foundations and other actors.
- ❖ **Global Philanthropy Forum** (www.philanthropyforum.org) A community of donors interested in international issues who come together to create new giving strategies and explore opportunities for co-funding.
- ❖ **Institute for Philanthropy** (www.instituteforphilanthropy.org) A global network that works to increase effective philanthropy in the United Kingdom and internationally by providing donor education, building donor networks, and raising the awareness and understanding of philanthropy.
- ❖ **Philanthropy Roundtable** (www.philanthropyroundtable.org) A national association of individual donors, foundation trustees and staff, and corporate giving officers that helps members achieve their charitable objectives through expert advice and counsel and connecting peers with similar concerns and interests. The Philanthropy Roundtable has a membership of over 450 philanthropic organizations and families.
- ❖ **The Philanthropy Workshop West** (www.tpwwest.org) A peer network of strategic global citizens who, through experiential philanthropy, create measurable, transformative change to address the pressing issues of our day.

- ❖ **Resource Generation** (www.resourcegeneration.org) A national organization that works with young people with financial wealth who are supporting and challenging each other to effect progressive social change through the creative, responsible and strategic use of financial and other resources.
- ❖ **Social Venture Partners International** (www.svpi.org) A network of over 20 Social Venture Partner (SVP) organizations based in cities across North America. Each SVP is a philanthropic community of individual donors who together practice a model of giving that parallels venture capital practices, combining grantmaking, volunteerism, nonprofit capacity building, and philanthropic education.

About Rockefeller Philanthropy Advisors

- ❖ **Rockefeller Philanthropy Advisors (RPA)** (www.rockpa.org) A nonprofit organization that helps donors create thoughtful and effective philanthropy throughout the world, RPA currently serves more than 150 donors in facilitating over \$250 million in annual gifts and grants to more than two dozen countries in Africa, Asia, the Caribbean, Europe, Latin America and North America. RPA provides research and counsel on charitable giving, develops philanthropy programs, and offers complete program, administrative and management services for foundations and trusts. It also operates a charitable giving fund through which clients can make grants inside and outside the United States, participate in funding consortia, and operate nonprofit initiatives.

Other Resources

- ❖ **Bolder Giving** (www.boldergiving.org) A community of donors whose mission is to inspire and support people to give at their full lifetime potential, created as an initiative of the Zing Foundation.
- ❖ **The Bridgespan Group** (www.bridgespan.org) A 501(c)(3) nonprofit that helps nonprofit and philanthropic leaders in the hard work of developing strategies and building organizations that inspire and accelerate social change.
- ❖ **The Center for Effective Philanthropy** (www.effectivephilanthropy.org) A nonprofit organization focused on the development of comparative data to enable higher-performing funders and help donors achieve the most positive outcomes on issues, fields, communities and people.
- ❖ **FSG Social Impact Advisors** (www.fsg-impact.org) A nonprofit organization that works with foundations, corporations, governments and nonprofits to accelerate the pace of social progress by advancing the practice of philanthropy and corporate social responsibility.
- ❖ **GrantCraft** (www.grantcraft.org) A program of the Ford Foundation; provides practical wisdom for grantmakers targeted at improving the effectiveness of program staff of foundations.
- ❖ **GuideStar** (www.guidestar.org) The leading source of information on US nonprofits; provides a searchable database of the IRS Forms 990 of more than 1.7 million IRS-recognized nonprofit organizations.
- ❖ **National Center for Family Philanthropy** (www.ncfp.org) Offers programs and services to encourage individuals and families to create and sustain a philanthropic mission, including “Family Philanthropy Online,” the leading online resource for family philanthropists and those who work with them.

Further Reading

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Rockefeller Philanthropy Advisors, "Your Philanthropic Roadmap."
<http://rockpa.org/your-philanthropic-roadmap>

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