A Note About SVP's Philanthropy Curriculum

Social Venture Partners' Philanthropy Curriculum has been designed to be delivered by any experienced facilitator. While a basic understanding of the content and audience will be helpful, the facilitator does not need to have extensive expertise on the topic.

The courses were designed by the instructional design team at Endurance Learning using best practices based on research about adult learning. They don't rely heavily on presentation, focusing instead on reflection, conversation and simulations to enhance the knowledge and skills of Partners and other participants. Each course was tested by partners and staff from across the network, both in-person and online.

The content is scalable, equally effective if delivered around a table to a group of 3 or 4 or as a more formal workshop with a group of 30 or 40. If you are delivering the content as an e-workshop, we recommend a tool like zoom.us, that includes features such as whiteboards, breakout rooms, chatting and polling.

While the courses were originally designed with new SVP Partners in mind, long-time Partners and staff in the pilots shared their view that all Partners will benefit from the content. In fact, community partners and individual philanthropists of all kinds can benefit, and SVP encourages wide spread dissemination of all the information herein. It is an open source document.

If you have any questions regarding SVP's Philanthropy Development Curriculum, please contact Social Venture Partners International.

Planning for Effective Engaged Philanthropy

Overview

Course Time: Approx 2 Hours

Advance Preparation
Learning Objectives & Materials

1. **Welcome & Introductions**
   Icebreaking Activity
   20 min

2. **Giving Vehicles**
   Individual Reading and Lecture
   10 min

3. **Giving Practices & Resources Profiles**
   Journaling and Reflection
   40 min

4. **Resource Matching**
   Small Group Work
   35 min

5. **Wrap Up**
   Group Discussion
   15 min

Advance Preparation

Learning Objectives & Materials

Overview

Effective engaged philanthropy neither begins nor ends with writing a check; it requires research, self knowledge, authentic relationships, and prudent selection of the right vehicle to achieve the goal. While it is often necessary to respond in the moment to requests for donations or other needs, donors can maximize impact with a little effort given to early planning and proactive consideration of all the ways they can provide meaningful support for needs.

Participants

This course aims to start to start the conversation about how to build giving into a financial plan. This course is best taken by participants who are new to wealth planning interested in executing engaged philanthropy.

Learning Objectives

By the end of this course, participants will be able to...

1. Explain what engaged philanthropy is and how it complements a financial gift
2. Explore the types of giving available and advantages and disadvantages of each in different scenarios
3. Identify and consider personal power in philanthropic decision making

Prework

1. Create three flipcharts with the the following nonprofit profiles.

Nonprofit A

- Mission: Increase girls' interest in engineering and technology through educational experiences and mentorship.
- Current Needs: Updated Strategic Plan, New Office Space

Nonprofit B

- Mission: Decrease hunger by collection of fruit and vegetables from backyard gardens.
- Current Needs: Volunteers, Marketing and Communication Plan

Nonprofit C

- Mission: Provide transitional jobs, as well as social services and addiction support to homeless veterans.
- Current Needs: Capital campaign for new building, New board members with health backgrounds

2. Write the numbers 1 through 5 onto sticky notes to create a set. Have a set of these for each table group.

Materials

Slideshow

Handouts

- A1. Giving Vehicles
- A2. Personal Resources Profile
- A3. Sample Personal Giving Plan
- A3. Personal Giving Plan
- A4. Scenarios

Other Materials

- Slide show
- Chime
- Index cards
- Markers
- Sticky notes
- Flipchart
- Pens
- Paper

Welcome & Introductions

Technique: Icebreaking Activity

20 Minutes

Welcome. As people enter the room, ask them to create name tags for themselves.

Where We're Heading Today

Once you have all (or at least most) of the participants present, introduce the course.

Welcome to this workshop which focuses on the ways you can make the most of what you give to nonprofits, whether it's through financial resources or otherwise. This workshop is not aimed to take the place of the advice you would get from a certified financial planner. What we'll be talking about today is how you can compliment your financial plan with proactive actions.

At SVP, we talk a lot about philanthropy and a variety of ways of giving.

Effective giving neither begins nor ends with writing a check; it requires financial planning and prudent selection of the right giving vehicle to achieve your philanthropic goals. While it is fine to respond in the moment to requests for donations, donors can have more impact with early planning and proactive giving.

By the end of this session you'll be exposed to content designed to help you:

1. Explain what engaged philanthropy is and how it complements a financial gift
2. Explore the types of giving available and the advantages and disadvantages when evaluated generally and personally
3. Consider personal power in philanthropic decision making

During this session we will be hearing a few stories and some words of wisdom, doing activities to take a closer look at engaged philanthropy and giving practices, and we will leave you with a few resources to bring home after our session as you consider integrating these practices into your personal life.

Before we jump into all of that, let's find out who is in the room today.

Introduce Yourself

1. Name
2. What keeps you busy
3. In a few sentences, tell us about someone who you associate with the phrase "above and beyond."

Let's do a short introduction activity. On the slide, I have three introduction statements I would like you to make to get to know a little about you. When I get to you, please state your name, tell us what keeps you busy, and briefly give us an example of a time when someone went "above and beyond" for you. I'll go first...

Introduce yourself, and then select a participant to start. Once everyone has an opportunity to introduce themselves, transition to the debrief.

Using Personal Power For Good

What would have happened or what would you have done if these people did not help in the ways they did?

Use the answers in the room to discuss how actions are gifts we can give others. If it doesn't come up naturally, ask:

- What feelings do you associate with these people?
- When someone exceeded your expectations, were you surprised? Why do you think that was or was not the case?

This discussion shows us that actions can sometimes bring value to a situation beyond what we can pay for or ask someone to do for us.

Giving Vehicles

Technique: Individual Reading and Lecture

10 Minutes

- A1. Giving Vehicles

Hand out A1. Giving Vehicles

Charitable Giving Vehicles

I am passing around a matrix with types of giving vehicles available. Please take a moment to review the types of charitable giving vehicles on the sheet. As you do, begin thinking about how each of these vehicles may be best put to use.

Give the participants three minutes to review.

As you can see, these giving vehicles run from straightforward to very complex. Other than the most basic giving methods, most will likely require at least some level of professional advice to help guide you with your unique financial or tax situation. Today is not about offering individualized financial advice; but what we can do together is arm you with a Personal Giving Plan and Resource Profile. Our goal with today's activities is to make sure you are prepared to meet with an advisor and make the most of the resources you have to offer.

Giving Practices & Resources Profiles

Technique: Journaling and Reflection

40 Minutes

- A2. Personal Resources Profile
- A3. Sample Personal Giving Plan
- A3. Personal Giving Plan
- Pen

Distribute handouts: A2. Personal Resources Profile, A3. Sample Personal Giving Plan, and A3. Personal Giving Plan

Your Personal Plan

Personal giving practices that reflect your own giving philosophies lend themselves to effective and successful philanthropy. Understanding the steps in financial planning, identifying the most effective ways to give, and determining the level of family involvement will help to start the process of effective giving practices, but this is just the beginning.

Values play a big role in giving decisions. SVP offers a session all about personal giving values you may find valuable if you'd like to dive deeper into this topic.

To help you as you move forward, we have a giving practices sample profile and worksheet we want you to use as you think about your giving strategy. Please take the next 25 minutes to begin creating your own plans. Your worksheet will likely look very different than the sample profile, the profile is only for reference.

When you're seeking out your wealth advisor, you should be having the level of discussion that shows up on these worksheets.

The second worksheet I am handing out now is a Personal Resources Profile, meant to be a brainstorm area and parking lot for the resources that stand out to you. You'll see that it's divided into three areas: financial, intellectual, and social capital. You can add to this throughout today's session. If it helps you, circle the ideas you want to prioritize and underline those that you will seek more information about.

Allow 25 minutes for review and reflections. If people are struggling, suggest that they get examples from or talk it through with their tablemates or with you.

Even if you're not completely finished, turn to the person next to you and share one or two parts of your plan.

Allow 5 minutes for peer sharing. Use this time to set up the flip charts for the next activity.

Your plans will evolve as you move through life or career changes, so you can always revisit it as needed. Keep them handy as we move on to our next activity.

Resource Matching

Technique: Small Group Work

35 Minutes

- Flip charts with three nonprofit profiles
- Markers
- Sticky notes pre-numbered
- A4. Scenarios

I'm passing around 5 scenarios to each group. You'll also see that I have written out short descriptions of three nonprofit organizations on these flip charts. In your groups, read the scenarios and match each with an organization. After making the match, discuss in your group the resources - financial, intellectual, and social - that the philanthropist would be able to offer the organization.

Hand out worksheet A4 and allow 20 minutes for group work. Toward the end of the time, distribute the numbered sticky notes to each table.

Philanthropist to Nonprofit Match

I've handed each group a set of sticky notes numbered 1 through 5. When you have made all your matches, send a representative from your group to put the corresponding sticky notes on the organizations you'd like to match them with, so we can see if everyone in the room agrees. You have 5 more minutes to wrap up and have everyone back in their seats.

Allow 5 minutes for groups to wrap up and place their sticky notes. When all the votes have been cast, discuss where there are discrepancies or why a certain group placed someone at a certain organization.

In the real world, a nonprofit's organizational needs will likely be more complicated than stated in this activity. What are the pitfalls to avoid and how would you approach your nonprofit of choice with the resources you have?

Take several comments, recording major points on a flipchart as you go, and help fill in the following points if they are not brought up naturally in the discussion:

- Nonprofits are complex and have ever-changing needs and priorities caused by internal and external factors.
- Be humble when approaching a nonprofit with your non-monetary resources, knowing that they may have other resources available to them or want to go down a different path
- Be clear with the nonprofit! Be upfront about the amount of time you have to give, the connections you are or aren't willing to make for them, and what you have to offer.
- Ask the nonprofit questions and be open to questions yourself. This will help figure out if your skills are a good match for the organization and if the organization is a good match for you and your plan.

Wrap Up

Technique: Group Discussion

15 Minutes

Reflections

Based on all of the conversations we've had today, the plans you've started to outline, as well as perhaps your own experiences, describe a way you will become more intentional about your own giving going forward?

Listen to comments and facilitate a discussion. If time allows, try to get one comment from each person.

Thank You

Thank you all for your time and working during this introductory session to giving practices. Please take your worksheets with you and use them as you create giving practices in your life.