2015 Philanthropy Outcomes Report
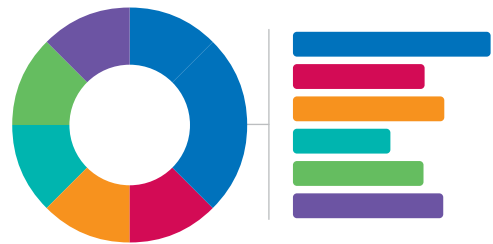
Prepared by
Katalin Marky &
Michael Castle
March 2016

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S ocial Venture Partners is a philanthropic network, but we do more than give away money. We help individuals amplify their giving, fund and strengthen organizations, and equip our communities to tackle our greatest social challenges — together.

There are more than 3,500 SVP partners in 40 cities and 9 countries — making SVP the largest network of engaged donors in the world. Since 1997, we have collectively contributed more than $55 million (USD) and hundreds of thousands of skilled volunteer hours to strengthen 770+ nonprofits.
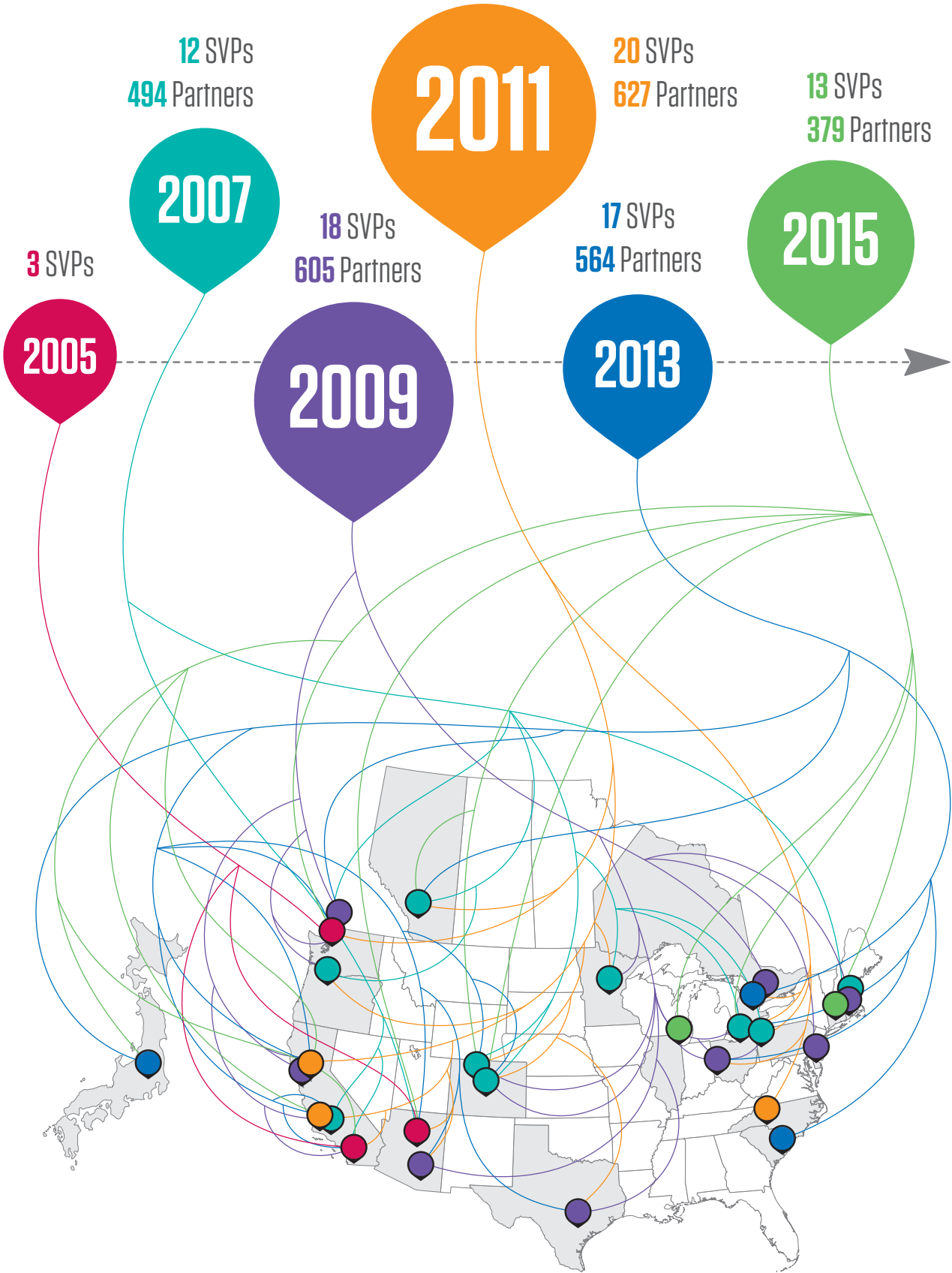
Cultivating increasingly generous, savvy and engaged philanthropists is one of SVP's key goals — and in this report we measure our success in that pursuit.

The following pages highlight findings from a biennial survey designed by the experts at Arabella Advisors. SVP partners have participated this survey since 2005, self-reporting on:

- Changes in the amount they give

- Changes in how they give

- Changes in their community involvement

The survey is one of several evaluation tools provided by the SVP Network Office. The project was funded by the Hewlett Foundation, Kellogg Foundation, Lodestar Foundation, and Surdna Foundation.

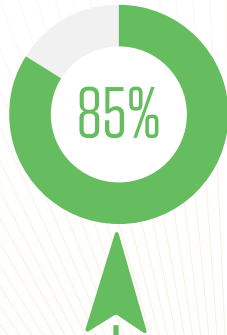# History of the Survey & Its Participants

3 SVPs

2005

12 SVPs
494 Partners

2007

18 SVPs
605 Partners

2009

2011

20 SVPs
627 Partners

17 SVPs
564 Partners

2013

13 SVPs
379 Partners

2015

Key Discoveries

Giving Increases After Joining SVP

73% of Partners reported increased giving
85% of whom credited SVP with the growth
38% said SVP was a key factor

73%

85%

Community Involvement Increases After Joining SVP

All 9 areas of community involvement increased
63% reported increased volunteer time
95% of whom said SVP was a factor
86% said SVP was a key factor

95%

63%

95%
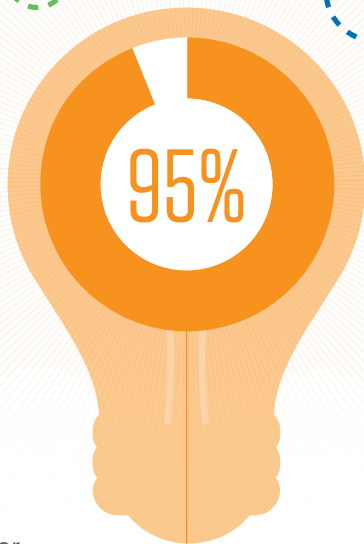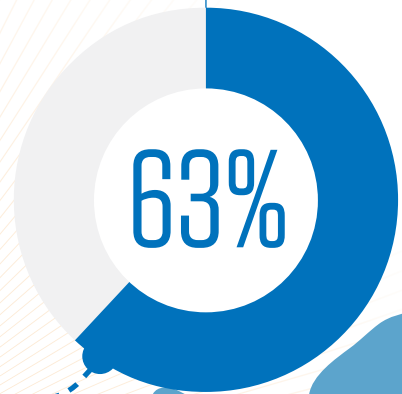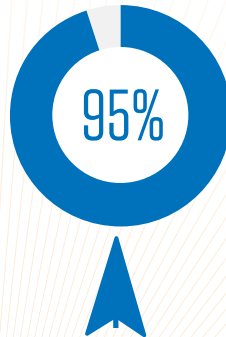
Strategic Giving Increases Due to SVP

All 10 giving practices increased
95% credit the way they give to SVP
50% of whom say SVP was a key factor
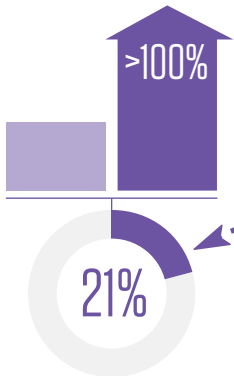
The Longer a Partner is Involved with SVP, the Greater the Change in All Three Outcomes

63% of new Partners reported giving increases
88% of 5-year+ Partners reported increased giving
21% of whom increased thier giving by more than **100%**

>100%

21%

88% 5+ Years

63% New

89%
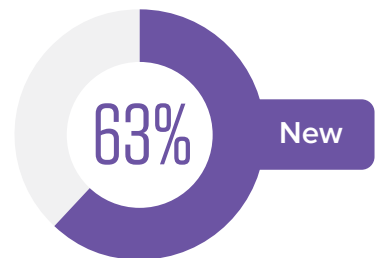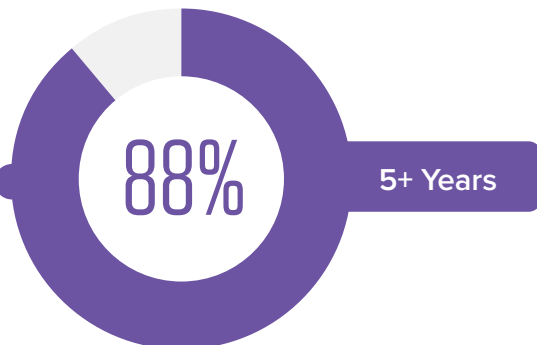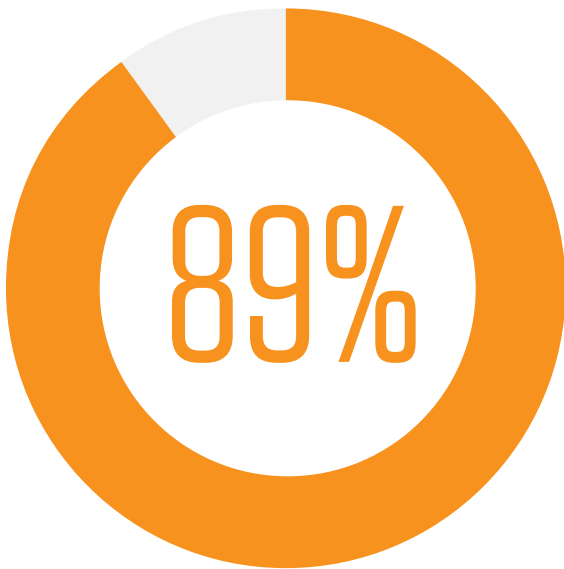
Participated Beyond Their Financial Contributiuon

The survey captured responses from partners at all stages of involvement, from new partners, 0-2 years (42%), to long-term (5+ years) partners (26.4%). The vast majority (89%) indicated that they had participated beyond their annual financial contribution to SVP.

Partnership with SVP

0-1 Year	28.8%
1-2 Years	13.7%
2-3 Years	17.9%
3-4 Years	7.1%
4-5 Years	5.8%
More than 5 Years	26.6%

SVP Activities in Which Survey Respondents Participated

Monetary contribution only	11%
Collective action teams	11%
Fast Pitch programs	20%
Serving on an internal working group	38%
Serving on a grant committee	47%
Attending at least one educational event	51%
Volunteering with an SVP investee	53%

Annual Contribution Amount

More than six out of ten partners (64%) donate at least $10,000 to noprofits each year. The typical annual gift to SVP (in North America) from a partner is approximately $5,000. 66% of respondents indicated that this contribution is less than half of their annual charitable giving.

Partner longevity seems to influence this finding. The data indicates that the longer a partner participates in SVP, the more his or her giving increases. Among respondents who have been partners less than two years, 61% indicated that his or her contribution to SVP is less than half his or her annual giving. That number rose to 64% among partners who have participated for 2 – 5 years, and to 75% among respondents who have been partners for more than 5 years.
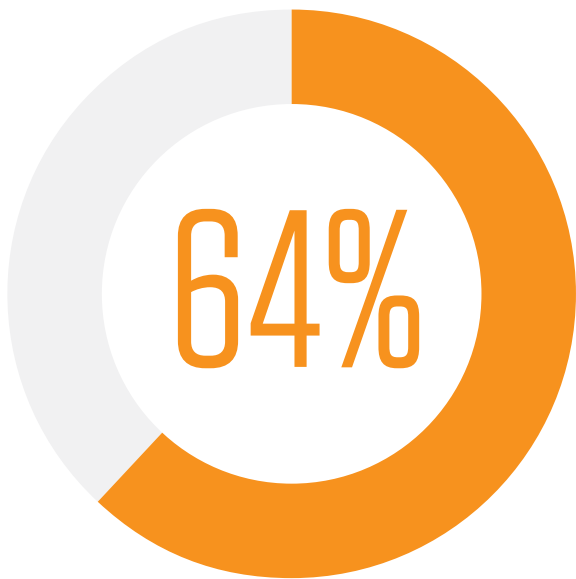
64% Donated At Least $10,000 to Nonprofits Each Year

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73%
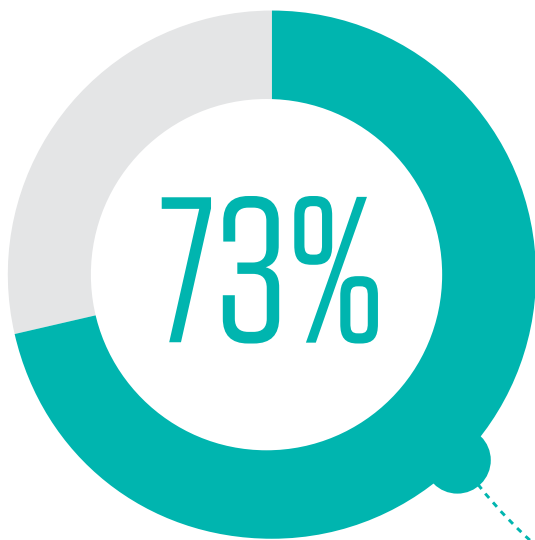
Increased Their Giving Since Joining SVP

50% +

26%

One of the three philanthropy development outcomes that are measured by the survey is change in the amount of giving among partners since joining SVP, and the role that SVP played in that change. In 2015, 73% of partners reported that their giving had increased since joining SVP. 26% reported an increase of 50% or more.

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Giving Increases with Tenure

63% — 0-2 years

73% — 2-5 years

88% — 5+ years
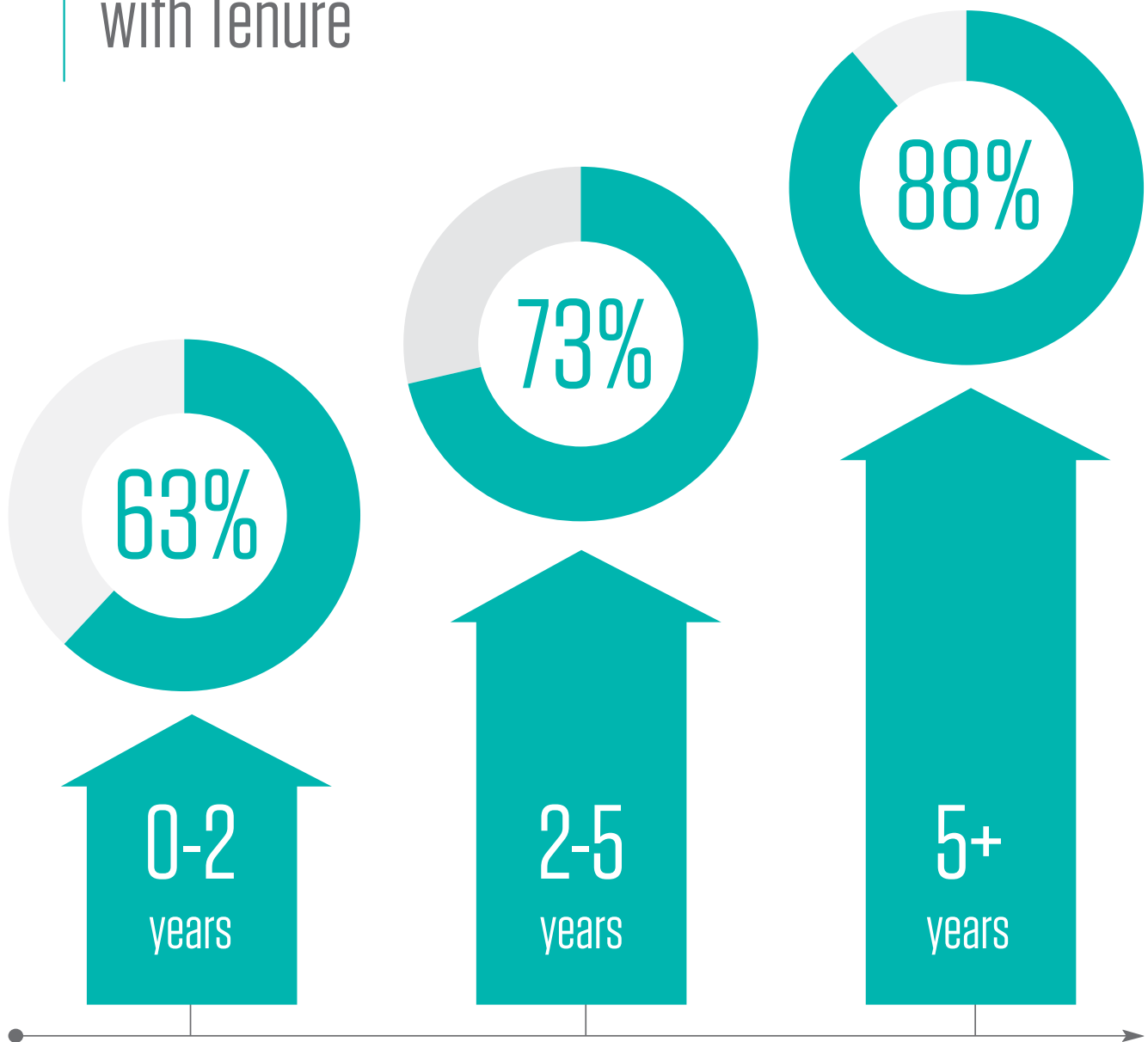
When changes in giving are broken out by partner tenure, the results are dramatic: while 63% of 0-2 year partners report an increase, 73% of 2-5 year partners and 88% of 5+ year partners do the same.

85%
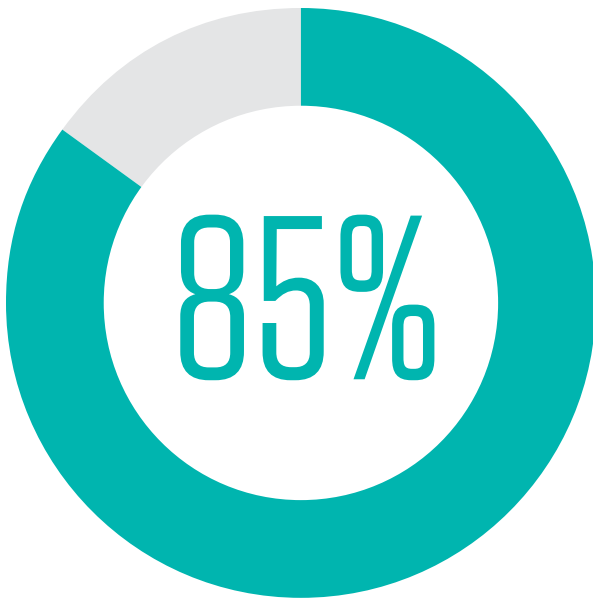
Said SVP Changed the Amount They Give

When asked to what extent their involvement in SVP has affected the change in their amount of giving, 85% of those respondents whose giving levels have changed indicated that SVP was a factor. 38% said SVP had a significant impact, 47% said SVP had some impact, and 15% said SVP had no impact on their giving.

SVP Activities That Influence Giving

n = 263

- 20% - Volunteering with Investees
- 18% - Meeting with Partners
- 17% - Serving on a Grant Committee
- 13% - Attending Education Events
- 12% - Other
- 9% - Attending Education Sessions
- 8% - Participating with Pitch Events
- 3% - Serving on a Collective Action Team

See further data for this section in the Appendix   Table of Contents
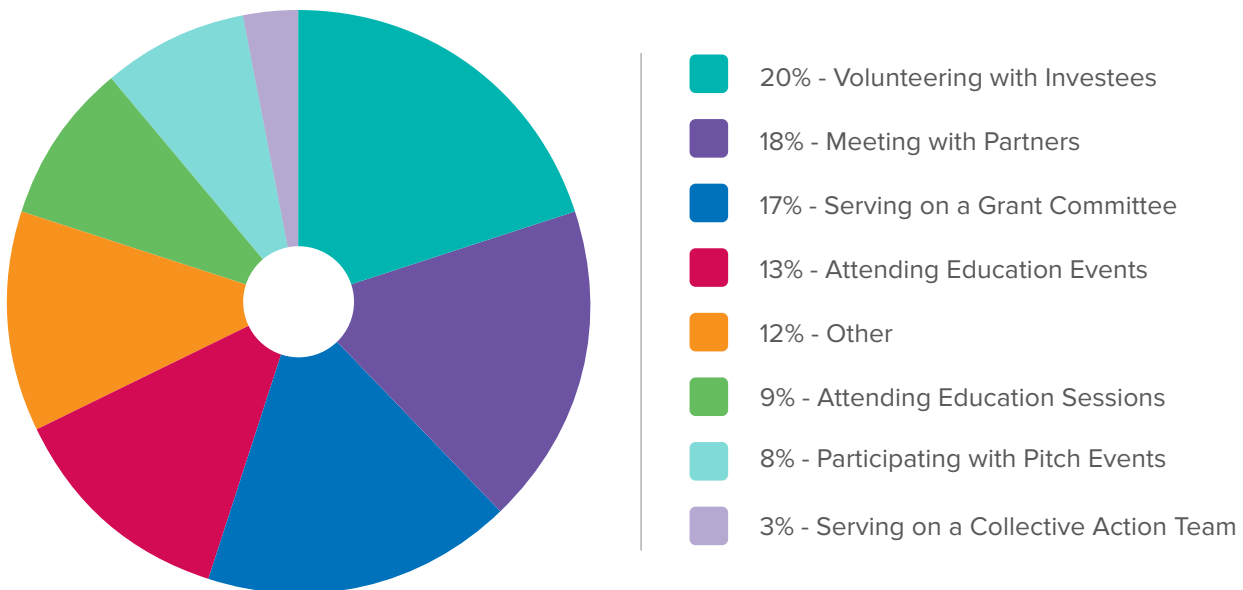
All 10 Areas of Strategic Giving Practices Increased

96%

on Average

The second outcome of SVP's philanthropy development programs relates to changes in how partners give. As a result of their involvement with SVP, many partners are much more thoughtful and deliberate in their approach to giving. In developing its outcomes measurement tools, SVP scanned the philanthropy development field and identified ten practices for strategic giving:

- Proactive/ Mission-Driven
- Uses Formal Processes
- Research-Based
- Collaborates with Others
- Funds Nonprofit Infrastructure

- Outcomes-Based
- Focus On Systemic/ Policy Impact
- Long-Term Approach
- Makes Fewer, Larger Donations
- Understands Power Dynamics

Complete definitions of each practice are available in Appendix A.

Respondents indicated which strategies they had used prior to joining SVP, and which they have used since joining.

Increases in Strategic Giving

107% Fewer & Larger Donations

117% Collaborative Practices

126% Understanding Power Dynamics

194% Using Formal Practices
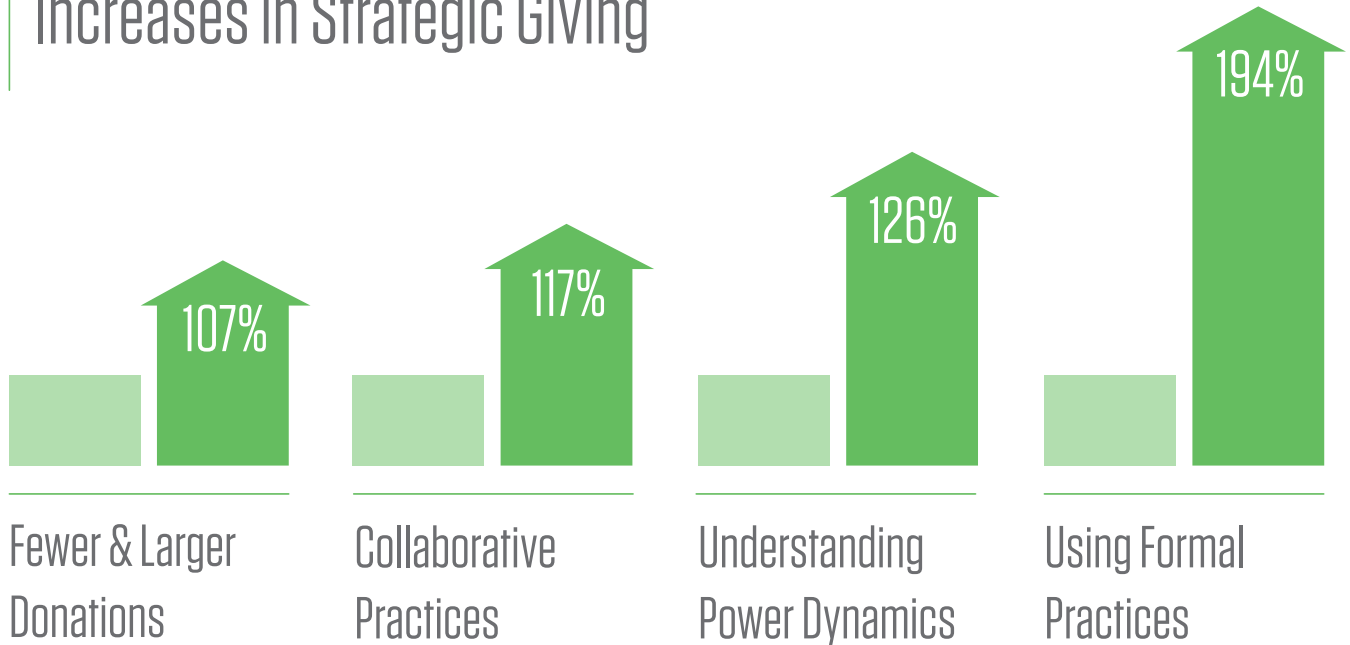
Each of the ten practices is used by more than 50% of respondents. Significant increases were reported in all ten practices, with some dramatic results.

The use of each of the ten practices show a general upward trend throughout the years. Since 2007 there's been more than a 50% increase in the proportion of partners who report using the following practices: Proactive/ Mission-Driven, Outcomes Based, Research Based, Collaborative and Systemic/ Policy Impact, Understands Power Dynamics.
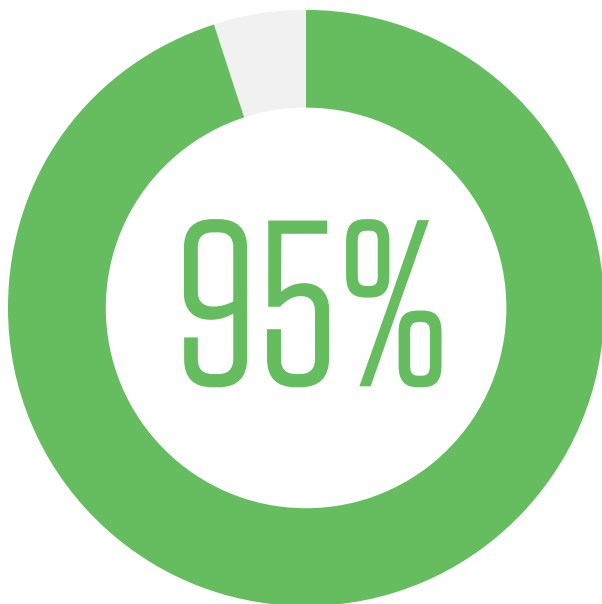
95% Said SVP Helped Them Give Smarter

When asked to what extent their involvement in SVP affected the way they give, 95% of the respondents indicated that SVP was a factor. 50% said SVP had significant impact, 45% said SVP had some impact, and 5% said that SVP had no impact.
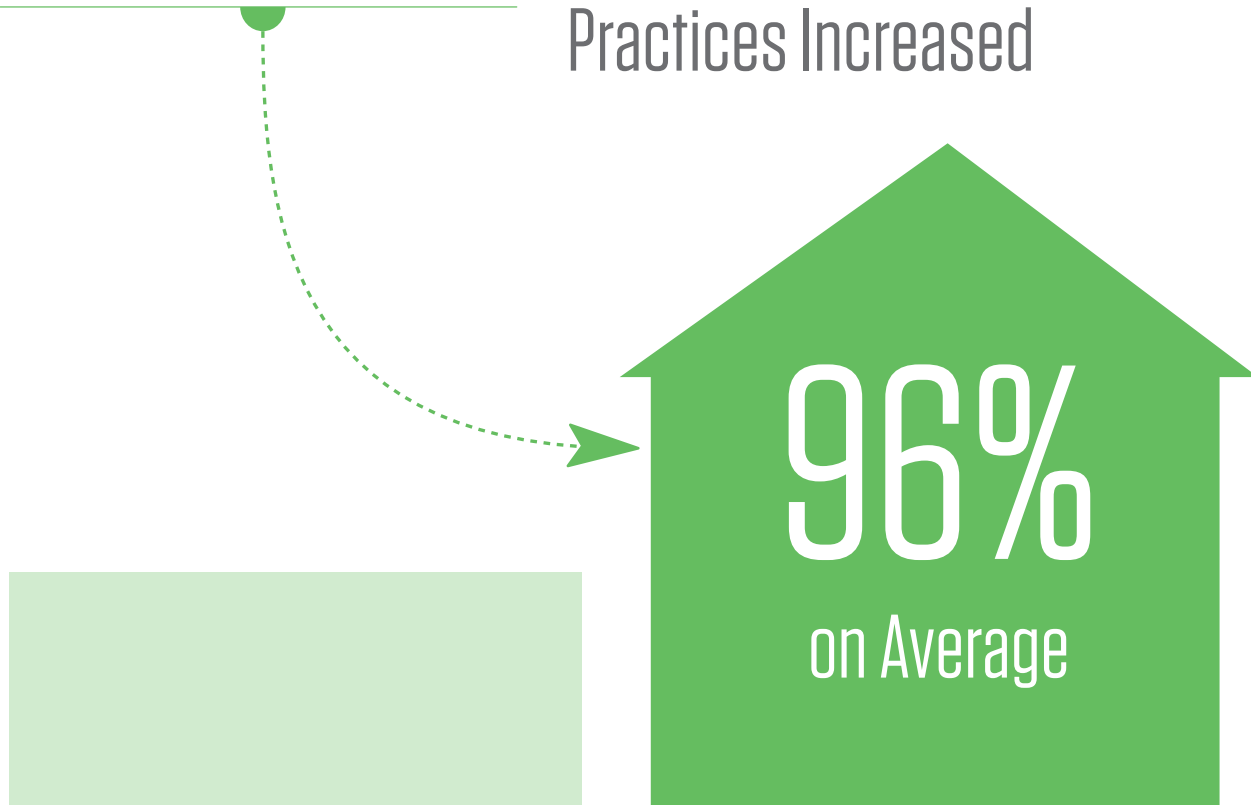
SVP Activities That Influence Giving Strategies

n = 257

- 25% - Serving on a Grant Gommittee
- 23% - Volunteering with Investees
- 14% - Meeting with Partners
- 13% - Serving on an Internal Working Group
- 8% - Other
- 6% - Attending Education Events
- 5% - Participating with Pitch Competitions
- 5% - Serving on a Collective Action Team

See further data for this section in the Appendix   Table of Contents
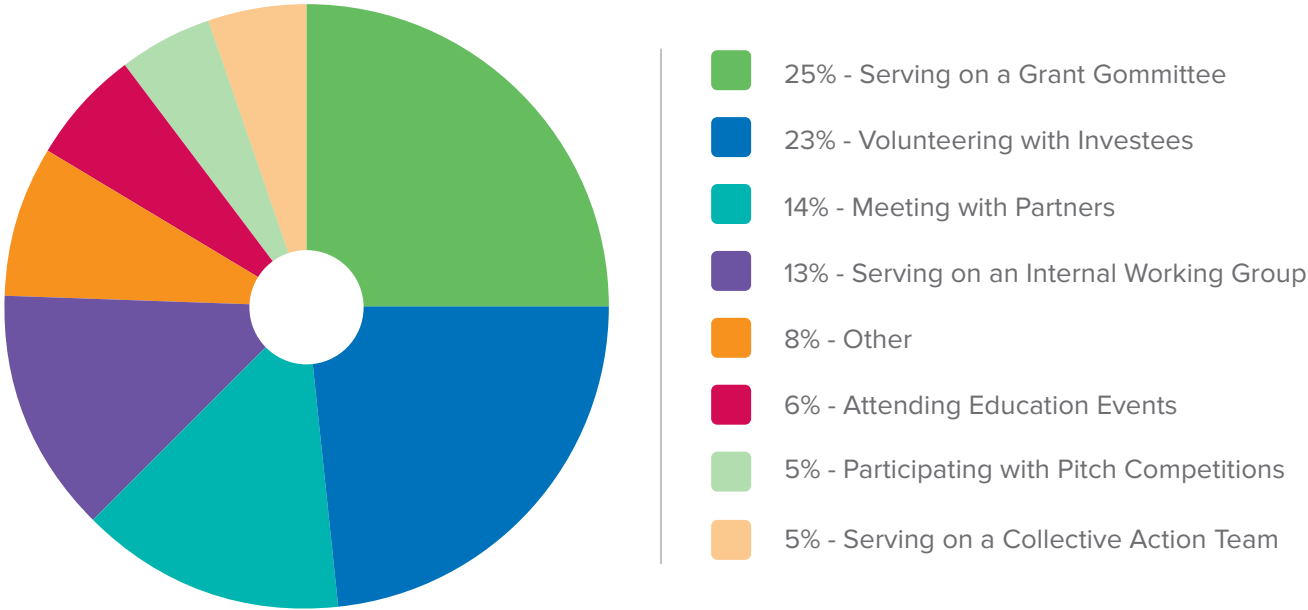
All 9 Areas of Partner Community Involvement Increased

95%
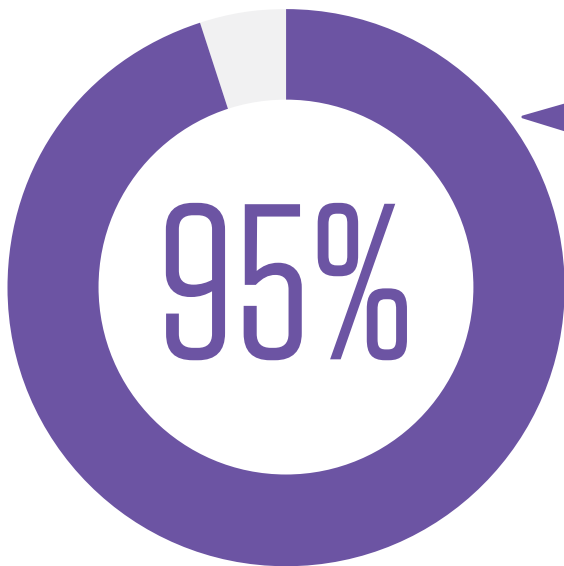
Credit SVP with the Rise

The final outcome measured in this survey is changes in community involvement. Nine practices of community involvement were identified by SVP after reviewing literature in the field:

- Community Problem Solving
- Volunteering
- Group Membership
- Contacting Media or Public Officials
- Legislative Advocacy

- Leadership in Local Organizations
- Leveraging Resources
- Attending Public Meetings
- Awareness of Community Affairs

Complete definitions of each practice are available in Appendix B.

In four of the nine practices, at least half of the partners who replied indicated that their involvement had increased. Volunteering (63%), Leveraging Resources and Awareness of Community Affairs (both at 56%) saw the greatest increase.

SVP's Impact on Community Involvement

n = 321

- 55% - Primary Factor
- 31% - Significant Impact
- 9% - Some Impact
- 4% - No Impact
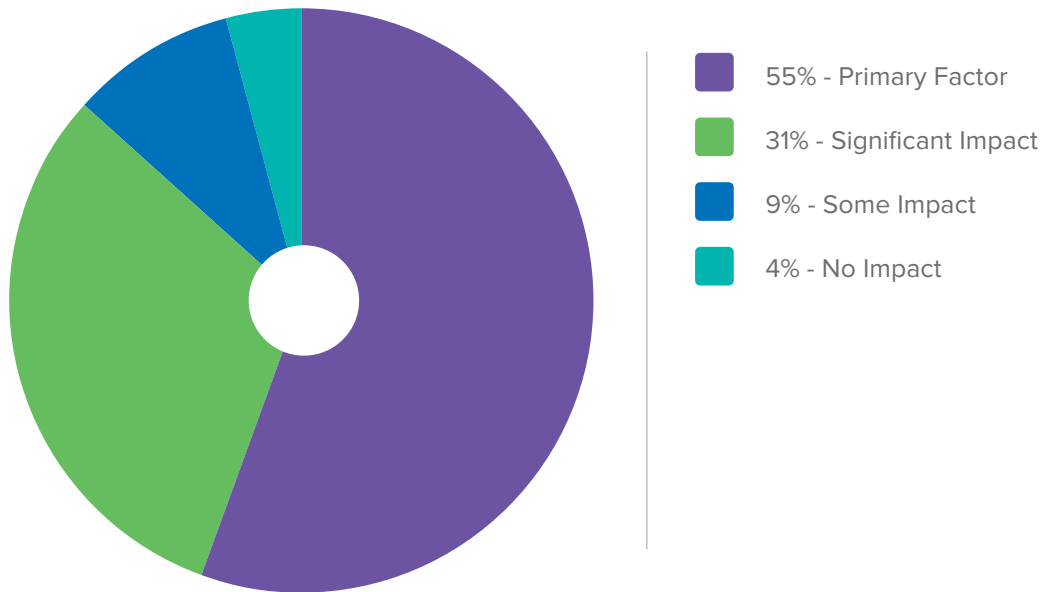
SVP Activities That Influence Community Involvement

n = 260

- 27% - Meeting Other Partners
- 24% - Volunteering with Investees
- 17% - Serving on an Internal Work Group
- 12% - Serving on a Grant Committee
- 8% - Attending Education Events
- 5% - Other
- 4% - Participating with Pitch Competitions
- 4% - Serving on a Collective Action Team

See further data for this section in the Appendix   Table of Contents
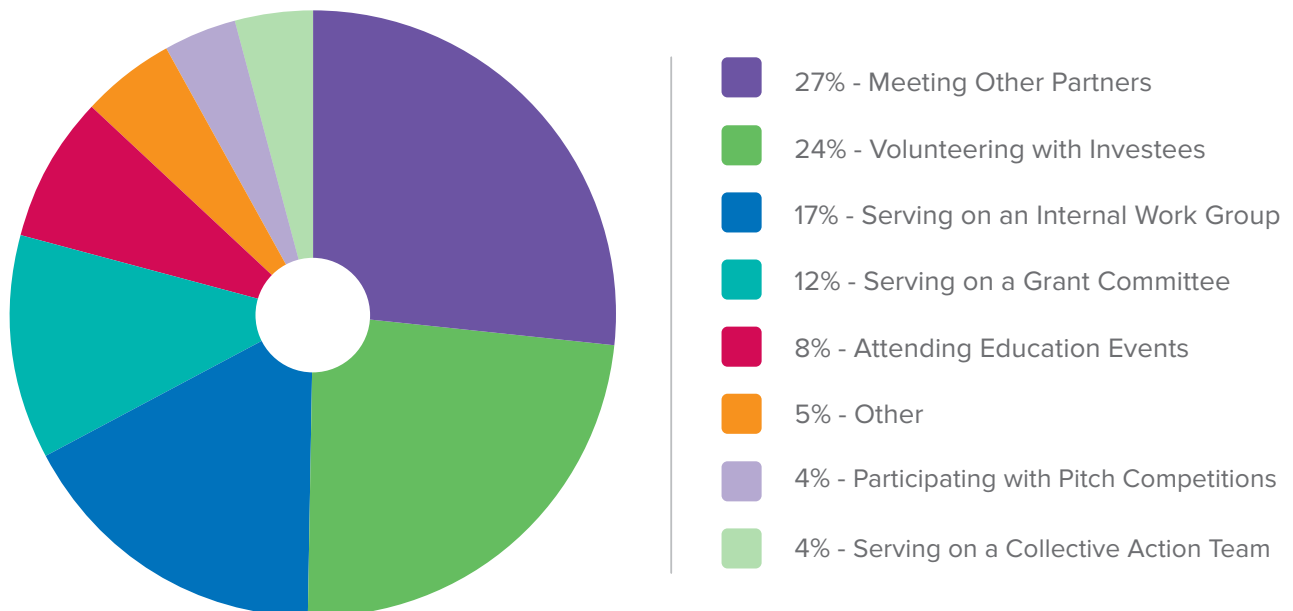
Appendices: Definitions & Further Data

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Appendix A | Definitions for Strategic Giving

The strategic giving practices listed below are drawn from best practices research in the field including the following resources:

New Visions Philanthropic Research and Development: *Philanthropy's Forgotten Resource? Engaging the Individual Donor: The State of Donor Education Today & A Leadership Agenda for The Road Ahead* By Dan Siegel and Jenny Yancey

Tracy Gary and Melissa Kohner in *Inspired Philanthropy: Creating a Giving Plan*

New Ventures in Philanthropy, Donor Education Knowledge Lab, Aspen Wye River, MD, November 15-17, 2004

Venture Philanthropy Partners' *High-Engagement Philanthropy: A Bridge to a More Effective Social Sector*

The Rockefeller Foundation's *The Philanthropy Workshop*

Strategic Giving Practices

Proactive/ mission-driven: Partner has a vision for change and contributes to nonprofits based on advancing his or her overall giving goals and/or strategies.

Uses formal processes: Partner uses established, documented practices for grant or donation assessment, conducts due diligence (such as site visits or interviews), has a plan for assessing whether a gift met its goals.

Research-based: Partner uses issue analysis and research to inform decisions about which organizations he or she wants to fund.

Collaborates with others: Partner solicits input from and collaborates with other funders, donors and/or community members to understand community needs, make informed grant decisions, and have greater impact.

Funds nonprofit infrastructure: Partner supports more than nonprofit programs, but also invests in the organizational capacity (staff and systems) of the groups he or she supports.

Outcomes-based: Partner seeks information about nonprofit performance and uses outcomes data to inform funding decisions.

Focus on systemic/ policy impact: Partner includes funding for efforts that address systemic change (e.g. advocacy, organizing activities).
Long-term approach: Partner makes multi-year gifts, maintains contact with nonprofit after grant is made.

Makes fewer, larger donations Partner makes fewer gifts each year, but the average value of each is significantly higher.

Understands power dynamics: Partner considers how issues of power and cultural differences (language, values, communication styles etc.) can impact the effectiveness of his/her philanthropy.

Appendix B | Definitions for Community Involvement

The community involvement practices listed below are drawn from best practices research in the field including the following resources:

Civic Engagement Index (developed in 2003 by researchers at George Mason University, Rutgers and DePaul and funded by Pew Charitable Trusts)

Social Capital Community Benchmark Survey (developed in 2000 by the Saguaro Seminar at the John F. Kennedy School of Government and funded by three dozen community foundations)

Leadership Development Survey (part of 10-year Violence Prevention Initiative completed by The California Wellness Foundation)

Strategic Giving Practices

Community problem solving: Partner has worked with a person or group to solve a problem in the community where he or she lives.

Volunteering: Partner has volunteered within or outside SVP.

Group membership: Partner has joined groups, either locally, nationally, or internationally and participated as an active member (PTSA, labor, rotary, community group, etc.)

Contacting media or public officials: Partner has written a letter to the editor or contacted the media and/or public officials on behalf on an organization or issue.

Legislative advocacy: Partner has started or joined a legislative advocacy effort on behalf of an organization or issue.

Leadership in local organizations: Partner has held a leadership role (such as a board member, officer, or committee chair) of a local organization or community group.

Leverages resources: Partner has recruited new volunteers and/or financial resources on behalf of an organization or community group.

Attends public peetings: Partner has attended and/or spoken at public meetings in which there was a discussion about community affairs.

Awareness of community affairs: Partner knows what is going on and talks about community affairs.

Appendix C | Survey Participants

1. Types of Involvement in SVP

Legend: 2007, 2009, 2011, 2013, 2015

Monetary contribution only: 14%, 13%, 10%, 12%, 11%
Serving on internal working group: 45%, 43%, 53%, 40%, 38%
Volunteering with an SVP investee: 51%, 48%, 55%, 53%, 53%
Serving on a grant committee: 55%, 55%, 51%, 49%, 47%
Attending at least one educational event: 62%, 61%, 66%, 56%, 51%
Collective Action Team: 14%, 11%
Social Innovation Fast Pitch: 12%, 20%

n=379
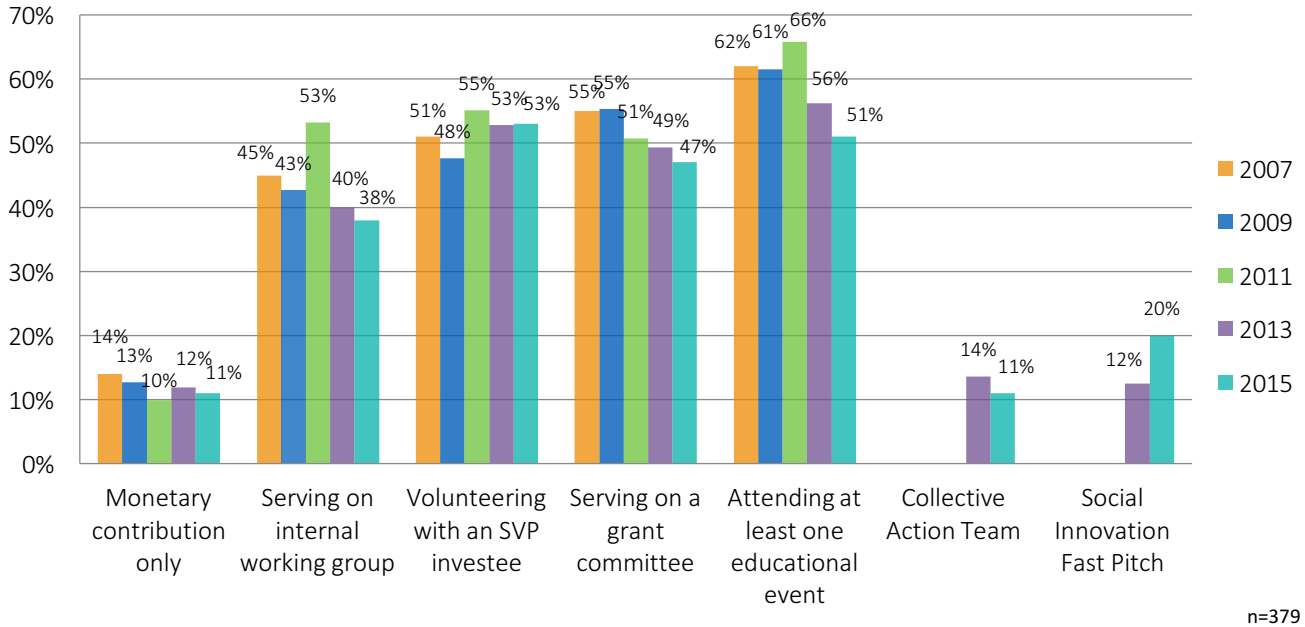
2. Involvement in Organized Philanthropy

- SVP Only: 44%
- Family Foundation: 13%
- Donor Advised Account at Community Fndn.: 12%
- Charitable Gift Fund w/Commercial Firm: 13%
- Giving Circle: 11%
- Other: 22%

n=379

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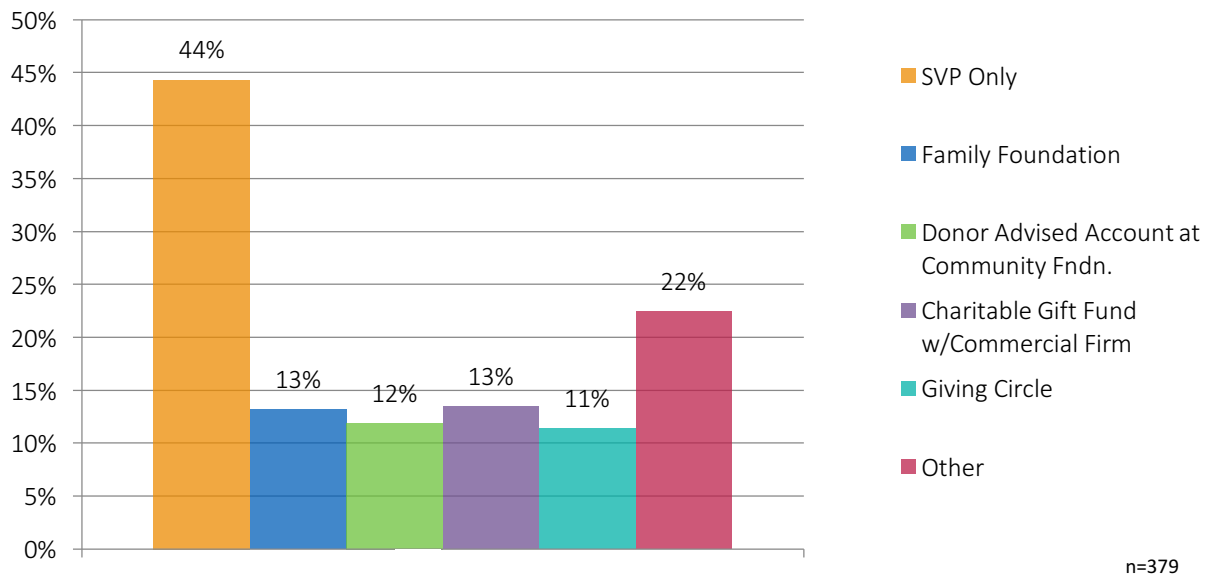
1. Changes in Giving Amounts Over Time

Change in giving levels by partner tenure
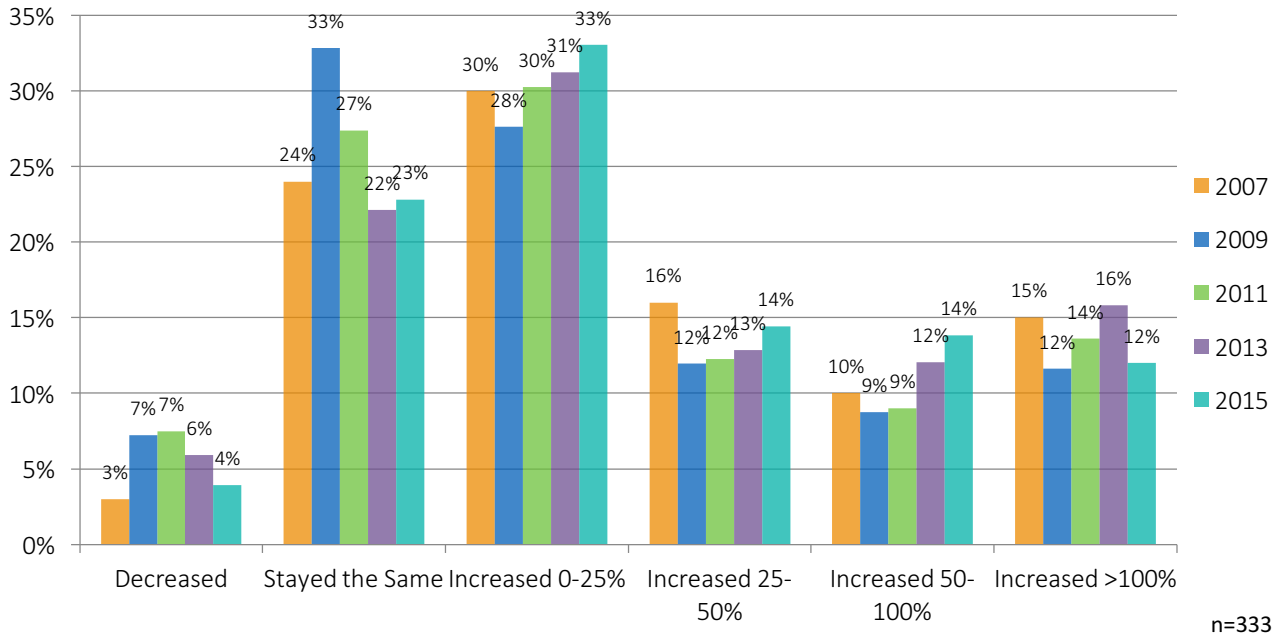
2. Giving Increases by Partner Tenure

n=333

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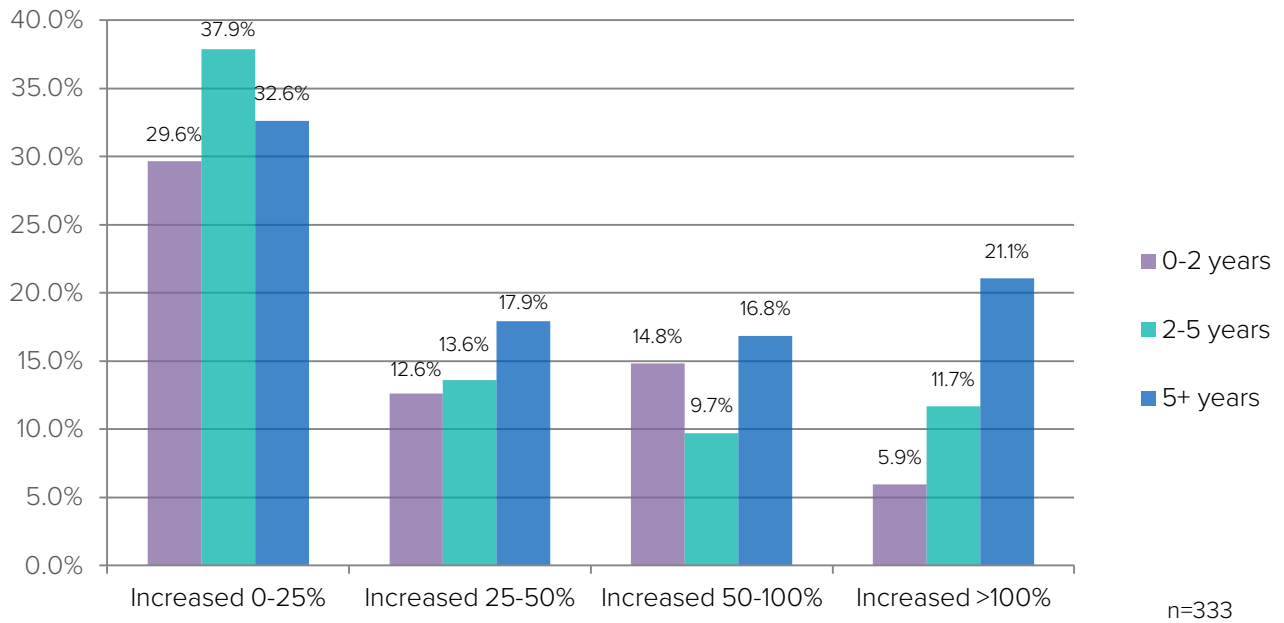
3. Greatest Influences on Increases in Giving

Chart legend: Second (teal), First (purple)

Category	First	Second
Involvement in SVP	39%	24%
Involvement in the community outside of SVP	23%	28%
Change in income and/or assets	23%	21%
Major life transitions	8%	12%
Other forms of organized philanthropy	4%	11%
Issues with wills or bequests	2%	3%

n=262
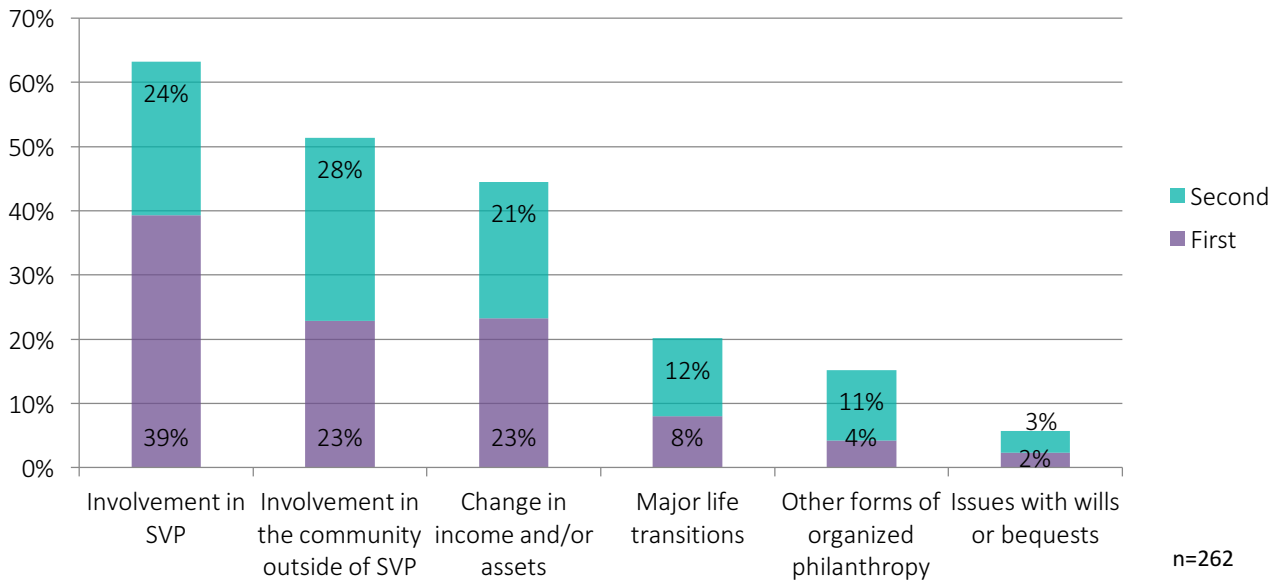
Appendix E | Changes in Giving Strategies

1. Changes in Strategic Giving Practices

Chart legend:
- Prior to joining SVP
- Since joining SVP

Category	Prior to joining SVP	Since joining SVP
Proactive/mission-driven	59%	91%
Funds nonprofit infrastructure	45%	82%
Outcomes based	44%	79%
Research based	45%	74%
Long-term	48%	72%
Collaborative	32%	70%
Fewer, larger donations	34%	70%
Systemic/policy impact	38%	69%
Understands power dynamics	28%	64%
Uses formal processes	21%	61%

n=330
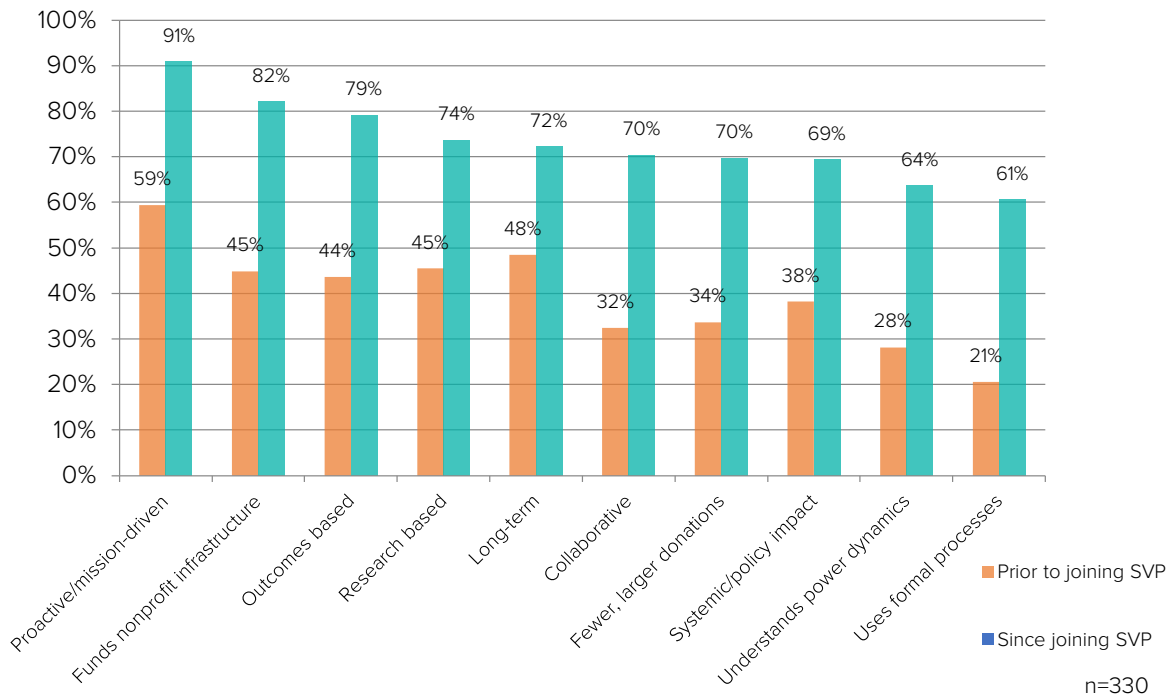
2. Strategic Giving Practices Over Time

Chart legend: 2007, 2009, 2011, 2013, 2015

Category	2007	2009	2011	2013	2015
Proactive/mission-...	58%	85%	91%	95%	91%
Outcomes based	52%	70%	79%	77%	79%
Funds nonprofit...	57%	69%	77%	83%	82%
Long-term	54%	66%	67%	74%	72%
Research based	47%	65%	68%	74%	74%
Fewer, larger ...	52%	59%	62%	67%	70%
Collaborative	49%	57%	67%	75%	70%
Systemic/policy...	42%	56%	64%	71%	69%
Uses formal...	44%	55%	60%	61%	61%
Understands...	41%	51%	52%	60%	64%

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100%

3. Strategic Giving Practices by Partner Tenure

Legend: 0-2 years, 2-5 years, 5+ years

Practice	0-2 years	2-5 years	5+ years
Proactive/missio...	92%	90%	92%
Outcomes based	78%	77%	83%
Funds nonprofit...	75%	85%	88%
Long-term	65%	75%	78%
Research based	75%	74%	72%
Fewer, larger...	67%	73%	69%
Collaborative	68%	69%	75%
Systemic/policy...	66%	71%	72%
Uses formal...	58%	66%	58%
Understands...	62%	68%	62%

n=330
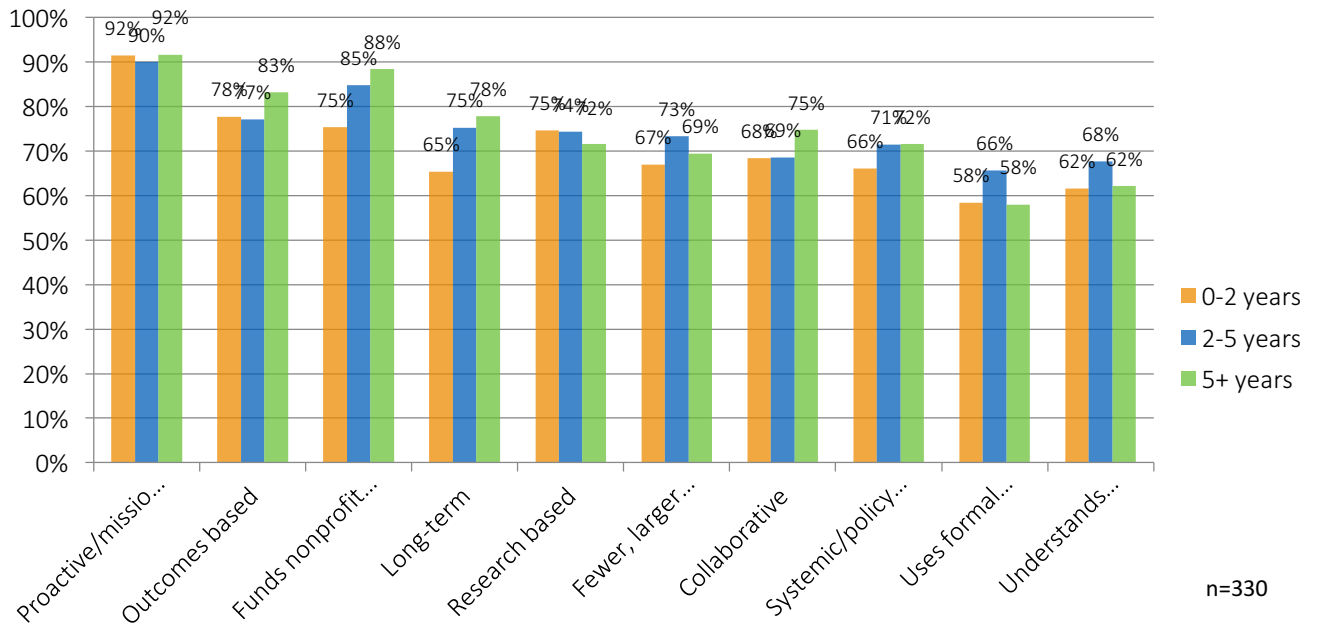
4. Greatest Influences on Strategic Giving Practices

Legend: Second, First

Influence	First	Second
Involvement in SVP	58.3%	25.8%
Involvement in the community outside of SVP	18%	33%
Change in income and/or assets	7%	10%
Major life transitions	8%	15%
Other forms of organized philanthropy	8%	12%
Issues with wills or bequests	1%	3%

n=252

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Appendix F | Community Involvement

1. Changes in Community Involvement

Chart data — Changes in Community Involvement (n=316). Legend: Significant increase (green), Some increase (purple).

Category	Some increase	Significant increase
Volunteering	38%	25%
Leverages Resources	45%	12%
Awareness of Community Affairs	39%	17%
Community Problem Solving	31%	20%
Leadership in local organizations	27%	16%
Public Meetings	21%	6%
Group Membership	19%	4%
Contacting media or public officials	17%	2%
Legislative Advocacy	13%	3%

n=316

2. Greatest Influences on Community Involvement

Chart data — Greatest Influences on Community Involvement (n=258). Legend: Second (green), First (purple).

Category	First	Second
Involvement in SVP	49%	30%
Involvement in the community outside of SVP	33%	33%
Major life transitions	8%	16%
Other forms of organized philanthropy	6%	12%
Change in income and/or assets	5%	9%
Issues with wills or bequests	2%	
Other	0.4%	0.4%

n=258

24

3. Increases on Community Involvement Based on Tenure

	0-2 years	2-5 years	5+ years
Leverages Resources	47%	55%	71%
Volunteering	57%	65%	68%
Community Problem Solving	39%	52%	65%
Awareness of Community Affairs	53%	56%	61%
Leadership in local organizations	34%	44%	56%
Public Meetings	26%	24%	33%
Group Membership	17%	22%	33%
Contacting media or public officials	14%	16%	30%
Legislative Advocacy	7%	16%	27%

n=316