



building & scaling
social innovations

SV2 New Partner Guide

Published 8/22/13

Welcome to SV2! We're thrilled you have joined as a Partner!

Everyone touched by SV2 is on a journey. SV2 is a community of like-minded peers who come together to help navigate and inspire each other's philanthropic journeys. SV2 is full of opportunity for exploration. There are many pathways to get involved. We know that as a new Partner, you are trying to understand the full landscape of SV2 offerings as quickly as possible. This booklet — your trail map overview— is designed to help you do just that.

But we also want to caution you that no “orientation” will map all possible engagement routes ahead that an SV2 Partner might choose to take. We suggest reading this packet and then jumping in and attending a few SV2 meetings. As you join fellow Partners at events, your view and understanding of SV2 will become more clear and you'll likely be ready and motivated to explore what's around the next bend. If you would like to meet with an SV2 Board or staff member to answer your outstanding questions and to help you plot your SV2 journey, please email SV2 Executive Director Jen Ratay at jratay@sv2.org.



- Name: SV2 stands for Silicon Valley Social Venture Fund
- Number of Partners: 200 individuals (and still growing)
- Partner contribution: At least \$6,000 per year
- Founding year: 1998
- Founder: Laura Arrillaga-Andreessen
- Board Chair: Nancy Heinen
- Executive Director: Jennifer Ratay
- Number of grants made so far: 41 grants, totaling nearly \$4 million
- Current Grant Areas: Education, Environment, and Local Underserved Communities; We also have active Grantees in International Development and Health
- Typical size of grants: \$100-150K over 3 years

In a nutshell, what do we do?

- We pool our money, skills, energy, and ideas with others who share our passion, to make a bigger, more meaningful impact in our community than any of us could make on our own.

What's SV2's mission?

- We have a dual mission: build the philanthropic capacity of our Partners and build the organizational capacity of our Grantees.
 - SV2 Partners become more strategic lifelong philanthropists as they select and advise Grantees, attend SV2 educational events, and learn from one another.
 - We strengthen our Grantees by giving financial support, advising, networking-building opportunities, and training.

What is “venture philanthropy” and how does SV2 use that approach?

- Our grants support nonprofit capacity building, so we look to fund organizations that are small but proven and ready to scale their impact.
- This concept of giving not only funds, but also leveraging the intellectual, human and network capital of our donors to support our Grantees, is known as “venture philanthropy.”

Is an SV2 Partner required to give his or her time as well as the annual financial contribution?

- There is no time requirement. Roughly one third of SV2 Partners contribute money only. Partners can be as involved as they want at different stages of their lives. The more you are able to engage, the more you will be able to expand your own learning and assist Grantees.

We recommend...

- Watch our movie: [What Should Every New Partner Know About SV2?](#) In 3.5 minutes you'll hear from 12 Partners what they wish they'd known when they were new Partners.
- Read the SV2 [Annual Report](#) – in 5 minutes you'll get a great overview of all the parts of SV2.
- Watch our [publicity movie](#) - 4 minutes of what we do.
- Flip through every page of the [SV2 website](#) – in 10 minutes you will get a great overview of everything we do.

SV2's Values, Culture & Decision-Making

What are SV2's values?

- At SV2 we're passionate about social and environmental change, and we value being smart and open-minded about how we do it.
- We value listening, learning, inclusiveness, and respect for all people.
- We strive to balance humility and boldness in our work.
- We embrace continuous improvement and seek constructive feedback to improve our work.
- We stand shoulder-to-shoulder with local nonprofits. We realize that they generally have greater expertise and experience in their issue area than we do.
- We are committed to helping Partners realize greater meaning and impact with their giving.
- We aim to cultivate compassion in our children and the next generation of givers.

What's SV2's culture?

- Our work is based on the fundamental premise that together we can make a larger, more meaningful impact than any one individual can alone.
- We work in an extremely collaborative way with each other. Partners find that giving together as a team is meaningful, educational, and fun.
- We are a “guilt-free” community. SV2 Partners have full lives and choose to participate more or less actively as their lives and circumstances allow. We embrace every level of participation.
- SV2 has a strong culture of innovation, and we embrace new ideas. To be effective, we also need to be focused and disciplined in which new ideas we choose to implement.
- SV2 is made up of Partners who step up to the plate to improve our community. Partners frequently stretch out of their comfort zones.
- SV2 has a very welcoming culture, and we love it when new Partners join. New Partners are encouraged to jump right in and contribute to discussions.

How are decisions made at SV2?

- When it comes to SV2's overall strategic direction, we seek lots of Partner input, and the Board of Directors makes the final decision.
- Each grant round decision comes down to a vote of the Partners in the room who have chosen to participate in the process. Each grant round has its own rules about how much you need to participate in order to vote.
- If you have an idea for a new project, the Staff and/or Partner who is in charge of that area would like to hear your suggestion.

Is fundraising or “pitching” allowed at SV2?

- SV2 is a “No-Pitch” Zone. Relationship-building is always encouraged. However, neither Partners nor Grantees are allowed to explicitly solicit donations or pitch their business services at an SV2 event. If you work at a nonprofit organization, we ask you to please remove that hat when you engage in SV2 activities.

How do we honor SV2's value of inclusiveness?

- We've learned from past experience that grantmaking groups and other Partner-led task forces work best when they take the necessary time to bring all interested Partners along. This promotes broad ownership, learning, and shared decision making. This is why we discourage “sub-groups” convening their own private meetings on the side. Key decisions are made together at official, publicized SV2 meetings open to all Partners.

SV2's People

Who are the Partners?

- Ranging in age from 20s to 70s, Partners come from every walk of life: doctors, entrepreneurs, lawyers, engineers, marketers, stay-at-home parents, and so on.
- Currently we have 115 Partner households, which translates into about 200 individual Partners.

Are most SV2 Partners new to philanthropic giving?

- No, we have the full range of philanthropic experience. The mix of new and experienced Partners makes for a synergistic mix.

Who are the SV2 Staff members?

- There are four staff members. Visit the [Staff webpage](#) to see our photos and bios!
 - Jennifer Ratay, Executive Director, jratay@sv2.org
 - Lisa Van Dusen, Dir. of Partner Engagement and External Relations, lvandusen@sv2.org
 - Elizabeth Dodson, Grantmaking & Special Projects Officer, edodson@sv2.org
 - Christine Rasmussen, Operations Coordinator, christine@sv2.org

Who are SV2 Board Members?

- The SV2 Board of Directors meets regularly to govern the organization and together guide SV2's strategy. Members include: Karen Appleton, Laura Arrillaga-Andreessen (Founder and Chairman Emeritus), Bill Brownell, Lyn Christenson, Alison Elliott, Lance Fors, Nancy Heinen (Chair), Gina Jorasch, Laura Kupor, Laura Lauder, Ben Lenail, Kim Meredith, Marcia Pade, Diane Parnes (Secretary), Kelly Pope, Kathy Salmanowitz, Rob Schoeben, and Mike White.

How do Staff and Partners interact?

- In general, SV2 Staff and Partners work and learn together as colleagues and thought-partners, with the end goal of creating social change and learning to be better philanthropists.
- Partners and Staff both contribute ideas at SV2 meetings, with mutual respect. However, whenever there is a vote for a Grantee, Staff refrains from voting.
- Partners who take on leadership roles work closely with Elizabeth or Jen.

Who are the Grantees?

- Over the last 14 years, SV2 has made grants to 41 innovative nonprofits. You can see the full list at our online [Portfolio of Grantees](#).
- We currently have nine "active" Grantees (because we make three grants per year and each grant lasts for three years), and we work closely with them beyond the dollars.
- Past Grantees are also an important part of the SV2 "family," and we invite them to the Annual Meeting, Spring Meeting, and skill-building workshops.
- Generally, the Executive Director is the person we interact with most at a Grantee organization. We also interact with senior Staff and Board members.

How do Grantees and Partners interact?

- We treat the staff of our Grantees with the utmost respect, and we guard their time carefully. We only introduce them to helpful contacts.
- We encourage all Partners to reach out to current and past Grantees they haven't met when they are together at the Annual Meeting, Spring Meeting, and workshops.
- We hope you'll organically find a Grantee you love working with and want to help more "beyond the dollars." This matchmaking is a key part of SV2's mission!

Norms for SV2 Meetings & Events

Where can I find a list of all upcoming SV2 events?

- Our online [calendar of events](#) lists every SV2 event that we know of, stretching out months into the future.

How do I RSVP for events?

- Email rsvp@sv2.org to let us know you're coming. It's very important that we get your RSVP so we have the right amount of seats, handouts, and food.

Do I have to come to every event?

- No way! SV2 has a strong “no guilt” policy. This means that your level of involvement is up to you. When life gets busy, feel free to come to fewer meetings or none at all.
- If you want to know what happened in your absence, you can read the minutes that are sent out via email to interest-area Google groups and posted on the password-protected portions of our website.

May I bring guests?

- Yes! If you have friends or acquaintances who are interested in becoming SV2 Partners, you should definitely bring them to meetings (email us at rsvp@sv2.org to let us know). We'll let them attend two meetings to help them decide whether they want to join.
- Exception: Occasionally a meeting is advertised as “Partners only” due to limited space.
- If your guest is not interested in joining SV2, then it's probably not a good idea to bring them to an SV2 meeting. Feel free to ask Staff for guidance.
- If your guest is an employee of or a Board member for a nonprofit, please acquaint him/her with SV2's “no pitching” policy (above).

Do we ever have SV2 events that *every* Partner attends?

- Yes, we typically have three all-Partner events each year: the Annual Meeting (Fall), the Holiday Party (December), and the Spring Meeting.

Do meetings start and end on time?

- At SV2 we pride ourselves on using meeting time very wisely. We make every effort to begin and end our meetings on time, but we depend on YOU to arrive a few minutes early so you can get settled and be ready to think and participate.

How do people interact in meetings?

- Every SV2 meeting has an agenda that was carefully planned by the Partner(s) and/or Staff who are running the meeting.
- We welcome participation and ideas from every person in the room. Of course, it's also crucial that every Partner respects the meeting facilitator and cooperates with his/her plan and timing. Please don't derail the agenda.

Can I make announcements at the beginning or end of the meeting?

- Only if it's an SV2-related announcement and only if you get permission from the meeting facilitator.

Collaborate on Grantmaking: How It Works

How many grants do we make each year? What size?

- Each year we award three grants of \$100,000 to \$120,000 over three years. This year, we'll made new grants in Education, Environment, and Local Underserved Communities. We also have Grantees in Health and International Development in our active Grantee portfolio.

What are the purposes of grant rounds?

- To select innovative, high potential Grantees who are ready to invest in their organizational infrastructure and scale their impact.
- To provide interested Partners with a deep, experiential education in grantmaking and exposure to remarkable nonprofit organizations.

Why does SV2 award capacity-building grants?

- Our grants are intended to invest in the organization's infrastructure and operations, not just pay for current programs. Capacity-building support typically is hard for Grantees to secure from other sources, yet it can be transformative to their organizations and the people they serve.
- When Grantees spend their SV2 grants on necessities like upgraded databases, fundraising staff, or evaluation studies, they are able to offer improved services to their clients and scale their impact.

Does SV2 accept grant proposals?

- No. Instead, during each grant round the Partners decide which community need we want to address, and then we research the nonprofit landscape to find high-potential nonprofits working in that area.

What criteria do Grantees need to meet?

- Bay Area office so that Partners can engage with the organizational leaders.
- 501(c)3 nonprofit status and budget size in our sweet spot (generally \$250K - \$2M).
- Desire to engage with SV2 Partners to improve their organization.
- Each grant round may also establish its own criteria on how to prioritize what's important in that year's grantmaking. Those decisions are made at the beginning of the grant round.
- We purposely leave the threshold criteria very basic so that group members get to *decide* where to focus – it's normal and healthy to have some disagreement within the group.

What are the steps of each grant round?

1. Choose specific focus area (e.g. organic farming or teacher retention) and learn from experts.
2. Compile a list of potential Grantees who work in that focus area.
3. Learn about the potential Grantees through online research, phone calls, interviews, and site visits and continually narrow the list through group voting.
4. Invite 2-3 finalists to make a presentation to the group.
5. Partners who have participated in the grant round vote for that year's Grantee.

What happens right after SV2 selects a new Grantee?

- Two SV2 Lead Partners are chosen to serve as liaisons to the Grantee.
- SV2 Staff and Lead Partners lead the new Grantee through OCAT (Organizational Capacity Assessment Tool) to discuss how the Grantee can leverage SV2's funding and expertise.
- The Grantee works with SV2 Staff to create a Grant Agreement, outlining where they plan to spend SV2 funding and setting milestones for Years 1, 2, and 3.

What else should I remember about grant rounds?

- When you join a “giving circle” like SV2, grantmaking becomes a shared decision, which will involve compromise. SV2 grantmaking involves a mixture of both “head” and “heart.”
- Partners often debate about whether to fund “breadth” (i.e. serving many clients) or “depth” (i.e. serving fewer clients intensely) of impact. Each grantmaking group gets to choose, and SV2 has made grants in both directions. This contributes to the diversity of our overall grantmaking portfolio.

Engage with Grantees “Beyond the Dollars”

Why do SV2 Partners engage with Grantees beyond the dollars?

- So that our Grantees benefit from the wide spectrum of professional expertise from Partners, and our Partners gain a deeper understanding of nonprofit organizational challenges and opportunities.
- SV2 offers several workshops each year to equip Partners with the skills and perspective to be helpful to Grantee leaders. Past topics include coaching skills, the life stages of nonprofits, fundraising, strategic planning, and Board governance.

What are the main ways I can help a Grantee?

- Be an “advocate” for the Grantee, telling your friends how great the organization is.
- Come to SV2 Advising Meetings to provide the Grantee with fresh perspectives on real challenges that they are facing.
- Engage directly with a Grantee as a Lead Partner. In this leadership role, you will be a sounding board and a cheerleader, providing encouragement and perspective as you check in with the Grantee regularly and link the Grantee to SV2 network resources.
- Use your specific career skills to “consult” with the Grantee on capacity-building issues such as marketing, strategy, IT, finance, fundraising, etc.

How can Partners help Grantees with “capacity building”?

- “Capacity building” means strengthening the infrastructure of an organization in areas such as:
 - Mission / vision / strategy
 - Fund development
 - Board governance
 - Marketing / communications
 - Staff leadership
 - IT
 - Program design / evaluation
 - HR
 - Financial management
 - Legal
- SV2 Partners often step forward to advise Grantees in the above areas. By building a nonprofit’s capacity in these areas, you can help the organization scale its model and grow its impact.

What is an Advising Meeting?

- SV2 organizes Advising Meetings for current Grantees a few times each year. These meetings are publicized in the SV2 eNews and all Partners are welcome.
- The Grantee Executive Director brings a mission-critical question the organization is grappling with, and asks SV2 Partners to help them brainstorm potential solutions. The topic is sent out ahead of time, along with brief background reading.
- These meetings are intended as a jumping-off point – a chance for any Partner to come explore which issues/leaders they might want to work with in greater depth.

Will Staff match me with a Grantee I can work with?

- If you’re interested in a “consulting” project, we usually have a good pulse on which Grantees might need your particular expertise. Please talk to Elizabeth Dodson (edodson@sv2.org).
- If you’re interested in being an advisor and thought partner to a Grantee executive, that type of “match” is usually an organic process that happens when you speak with Grantee leaders at SV2 events and find that you both want to continue to work together.

– Path 3 –

Hone Your Leadership Skills: SV2's Volunteer Leaders

Why does SV2 have Volunteer Leaders?

- SV2 Partners make the decisions about where to award grants and how to get involved with our Grantees. Each year, we select Partners who are experienced and willing to lead their peers in the grantmaking process and in the Grantee advising process.

What do Grant Round Leaders do?

- Each year, Grant Round Leaders help "steer" our grantmaking groups through the process of selecting Grantees.
- Grant Round Leaders facilitate monthly meetings, after planning each agenda with Elizabeth.

What do Lead Partners do?

- Lead Partners serve along with Staff as the link between SV2 and each Grantee during our three-year grants, keeping the communication chain solid, and ensuring that Grantees are accessing the full potential of the SV2 Partnership.
- As the grant begins, Lead Partners help the Grantee go through a self-assessment process and set goals for the Grant Agreement.
- Lead Partners check in with Grantees regularly to provide accountability on goals set and to help link Grantees to the capacity-building resources they might need.
- Lead Partners work toward becoming trusted advisors to Grantees.

What do SV2 Board Members do?

- Board Members approve the overall strategic direction of the organization and work with SV2 staff on recruiting and retaining Partners.

What if I want to explore options for serving as a Volunteer Leader?

- If you're interested in serving on the Board of Directors, please chat with Board Chair, Nancy Heinen (nheinen@mac.com).
- If you're interested in serving as a Grant Round Leader or Lead Partner, please chat with Grantmaking & Special Projects Officer, Elizabeth Dodson (edodson@sv2.org).

Who are the current Grant Round Leaders and Lead Partners?

- For names and photos, visit SV2's [Volunteer Leadership webpage](#)

Who are the current members of SV2's Board of Directors?

- For names, photos, and bios, visit SV2's [Board webpage](#)

How to Get Your Kids Involved

What is SV2 Kids?

- The SV2 Kids Service-Learning Program is designed to bring families together to broaden the perspectives of our children while meeting the needs of the local community and building a community for parents who are concerned about raising socially-conscious children.
- The SV2 Kids and their parents meet four times each year, generally on Sunday afternoons.
- Each service project focuses on a different topic, including the elderly, the environment, animals, and homelessness.

What do SV2 Kids activities look like?

- Each activity has components of learning about the issue area, performing service for those in need, and then taking time to reflect on what they've learned.
- The content of the program is geared toward children age 4-12.

How do I get my kids involved?

- Each activity is publicized in the SV2 eNews 1-2 months in advance.
- We also send emails to all Partners in the SV2 Kids Google group. (If you marked an interest in SV2 Kids events on your SV2 Membership Application, you should be receiving our emails four times a year. If you want to join the list, email christine@sv2.org.)
- If you have any questions about the program, feel free to reach out to the Co-Chairs: SV2 Partners Nancy Yu (jnmarks@sbcglobal.net) and Laura Kupor (lskupor@gmail.com)

What is SV2 Teens?

- Each year, middle and high school students come together for seven training sessions that inspire broad and deep learning about the nonprofit sector and how they can help.
- The SV2 Teens go through a grantmaking process very similar to their parents: They volunteer at three non-profits, and then debate the strengths and challenges of each organization and decide how to allocate their \$5,000-\$10,000 grant dollars among the three organizations.

When and where do SV2 Teens meet?

- The SV2 Teens meet six times from January to May. Generally, meetings are on Sunday afternoons from 2:00 to 5:00pm.
- Meeting locations vary, since the SV2 Teens visit three different nonprofits and visit several businesses in the area (such as eBay and Facebook) to gain exposure to various career paths.

Who can participate?

- SV2 Teens is only open to the children or close relatives of SV2 Partners.
- Participants must be in 6th-12th grades. About 20-30 students participate each year.

How do I enroll my teen?

- In December or January, we publicize that year's plan and schedule in SV2's eNews. We also send these details via email to all Teen families that we know of. Simply reply to enroll.
- If you have any questions about the program in the meantime, feel free to reach out to our consultant Amy Johnson (amy@classroomsforchange.com), who runs the SV2 Teens program.

How SV2 Helps You Grow

As a Philanthropist

- Participate in [grant round meetings](#) to learn experientially about how to award grants strategically and effectively
- Attend [First Fridays](#) lunchtime learning sessions to learn about cutting-edge trends in philanthropy
- Check out our [Resources for Donors](#)
- Read our [Grantmaking 101 slides](#) for a great overview of the nonprofit sector and how grantmaking works
- Make an effort to get to know other Partners at SV2 meetings and learn from their philanthropic experiences

As an Advisor to a Nonprofit

- Join in on [Advising Meetings](#) with current Grantees to brainstorm and strategize in a low-pressure group
- Attend our [workshops](#) to understand the nonprofit sector and to gain the skills you need to be helpful to Grantees “beyond the dollars”
- Read our guide: [Tips & Tools for Being a Great Advisor to Nonprofits](#) (PDF)
- Check out our [Coaching Resources](#)
- Learn about the [Life Cycle of a Nonprofit](#) (PDF)
- Make an effort to get to know Grantees at SV2 events and ask them about the challenges and opportunities they face, and what kind of help they need

As a Board Member

- SV2 hosts at least 1-2 workshops each year to prepare SV2 Partners to serve on nonprofit Boards
- Read our guide: [Tips & Tools to Understand Nonprofit Fundraising](#) (PDF)
- If you would like help from SV2 Staff to find a nonprofit Board of Directors to join, please talk to us!

As a Parent

- Participate in [SV2 Kids Service Learning events](#) with your 4-12 year old kids -- we have four projects per year
- Encourage your 6th-12th grade kids to participate in the [SV2 Teen Philanthropy program](#), January – May

As a thought-leader for social and environmental change

- Read the [SV2 blog](#) to hear about trends in grantmaking and the nonprofit sector
- Hear from industry experts in [grant round meetings](#)
- Attend [First Fridays](#) to learn about cutting-edge trends in philanthropy
- Read our suggested [social sector publications](#)
- Engage on SV2’s [Facebook page](#).

Your GPS: Where to Find the Information You Want

Where should I look first?

- Everything you need to know is on SV2's [website](#).

Which two emails does every Partner receive every month?

- The “eNews” comes out around the 1st of each month
 - It includes articles, a list of upcoming events, a Grantee update, introductions to new Partners, recent photos, and a note from Jen, SV2's Executive Director
- The “Upcoming Events” email comes out around the 15th of the month
 - It is a simple list of all events for the next month, with links to RSVP

Which email lists require “opting in?”

- On your New Partner Application, you may have already checked the boxes to be on these mailing lists:
 - Education Group
 - Environment Group
 - Local Underserved Communities Group
 - International Group
 - SV2 Kids
- We work hard to limit the amount of email you get on these lists -- they each average 1-3 emails per month. Please make sure you read all of it to stay “in the loop” for your group(s).
- If you're not yet signed up for a particular email group and you'd like to join, please email christine@sv2.org.

What information can I find on the SV2 website?

- Full event list – including every event we know of for the next several months.
- [Password-protected pages](#) for each Grantmaking Group. This is where we post meeting minutes, educational articles relevant to your group, and confidential documents the group is reviewing as part of the grantmaking cycle. (To sign up for access to the groups, you first need to request membership, and once your request has been approved, you'll be able to access the pages. If you have any trouble signing up, please email christine@sv2.org.)
- Past [podcasts](#), [videos](#), and [photos](#)
- SV2's [Blog](#)
- A list of all our current and past [Grantees](#)
- Profiles of our [Partners](#) and [Grantees](#)
- [Resources](#) for donors
- [Grantee Events & Philanthropy Events](#) – A list of recommended non-SV2 events that will teach you about philanthropy or about an SV2 Grantee
- In general, remember that you can see all the newly-posted website information on [the homepage](#)

We also encourage you to follow us on [Facebook](#) and [LinkedIn](#)!

Ask More Questions & Enjoy the Journey

Now you know all the basics. We encourage you to jump in and attend SV2 meetings!

If you would like to meet with an SV2 Board member to answer questions and to help you navigate your SV2 journey, please email SV2 Executive Director Jen Ratay at jratay@sv2.org. Or feel free to reach out to SV2 Staff for answers.

Questions about SV2's strategic direction:

Jen Ratay Executive Director jratay@sv2.org	Nancy Heinen Board Chair nheinen@mac.com
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Questions about grant rounds or getting involved with Grantees:

Elizabeth Dodson
Grantmaking & Special Projects Officer
edodson@sv2.org

Questions about communications or training:

Lisa Van Dusen
Director of Partner Engagement & External Relations
holly@sv2.org

Questions about SV2 Teens:

Amy Kurzeka Johnson
Teen Program Director
amy@classroomsforchange.com

Questions about SV2 Kids:

Nancy Yu Co-Chair of SV2 Kids jnmarks@sbcglobal.net	Laura Kupor Co-Chair of SV2 Kids lskupor@gmail.com
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Questions about logistics:

Christine Rasmussen
Operations Coordinator
christine@sv2.org

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