Social Venture Partners Boulder County
Report on Impact in Philanthropy Development, 2015

Background

Social Venture Partners Boulder County (SVP) has a dual mission: developing philanthropy and volunteerism among its members (Partners) and building the capacity of nonprofit organizations (Investees).

This report pertains to SVP's effectiveness in developing philanthropy among its Partners. SVP develops philanthropy through donor education seminars, connecting Partners with Investees to do volunteer work, and providing opportunities for Partners to serve on investment committees.

As a learning organization, SVP seeks to continually assess its progress and improve its performance. SVP has chosen to assess its impact on philanthropy development through four outcomes:
o   Changes in how much Partners give (Amount of Giving)
o   Changes in the way Partners give (Strategic Giving)
o   Changes in Partners' involvement in their communities (Community Involvement)
o   Changes in Partners' knowledge of nonprofits and community issues (Partner Knowledge)

Methodology

The following data collection tools were used to generate this report:
o   The Partner Survey, administered in July and August of 2015, generated qualitative information related to Partner satisfaction, giving and community involvement. SVP received responses from 44% of Partner units (households or businesses).

o   The data on Partner outcomes reported reflect those Partners who responded to the survey, not all Partners. It is predictable that the most active Partners are the most likely to complete the survey. Therefore, while our response rate (44%) reflects the diverse nature of our Partnership, it most likely over-samples the more active Partners.

Survey Limitations

The data that follow paint a meaningful and important portrait of SVP's impact in its work in promoting and developing philanthropy. It is nonetheless important to acknowledge several aspects of the research methodology that may impact the data.
o   Information about changes in Partner giving and community, and some information about changes in knowledge, are self-reported. In most cases, we would expect Partners' perceptions of changes to reflect their actual changes. However, it is possible that in some cases the data may be skewed by the subjective nature of self-reporting.

General Information about Respondents:

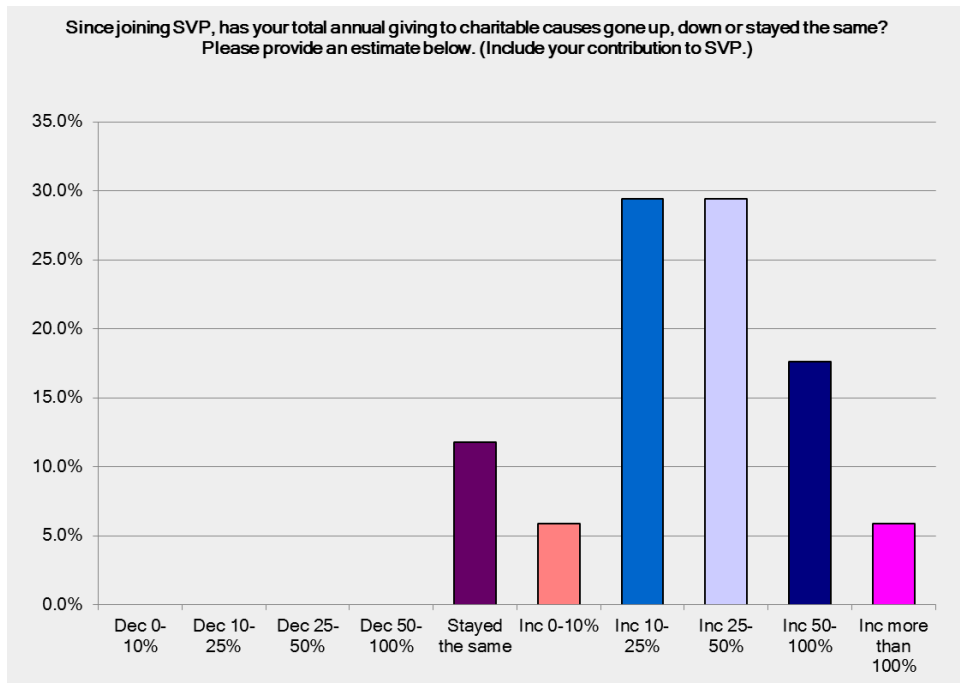Among those Partners who responded to the Partner Outcomes Survey:
o   36% of respondents had been Partners less than two years, 35% had been Partners 2-5 years and 29% had been Partners for five years or more.
o   100% of respondents had had some form of engagement with SVP since joining (and 85% had volunteered with an Investee)
o   25% of respondents participate in some other form of organized philanthropy besides SVP
o   For 40% of respondents, their contribution to SVP was more than half of their total philanthropic giving last year

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Key Findings on Impact

A. Changes in Amount of Giving

Tracking changes in the amount of giving is important because it establishes whether involvement with SVP has any actual impact on increasing the amount of philanthropic dollars in the community.

o   In 2015, we found that 88% of Partners who responded increased their giving since joining SVP. The table below provides a more specific breakdown according to how much Partner giving had changed since joining SVP:

Since joining SVP, has your total annual giving to charitable causes gone up, down or stayed the same? Please provide an estimate below. (Include your contribution to SVP.)

SVP's Role

Among those Partners whose giving level had changed, 78% said their involvement with SVP had at least some impact on that change. This number can be further broken down as follows:
o   41% said their involvement with SVP had *some* impact on their change in giving
o   18% said their involvement with SVP had *significant* impact on their change in giving
o   18% said their involvement with SVP was the *primary* factor in changes in their giving

We asked those Partners to identify the two factors that had the greatest influence on changes to their giving. The most common responses were:
o   Involvement with SVP (79%)
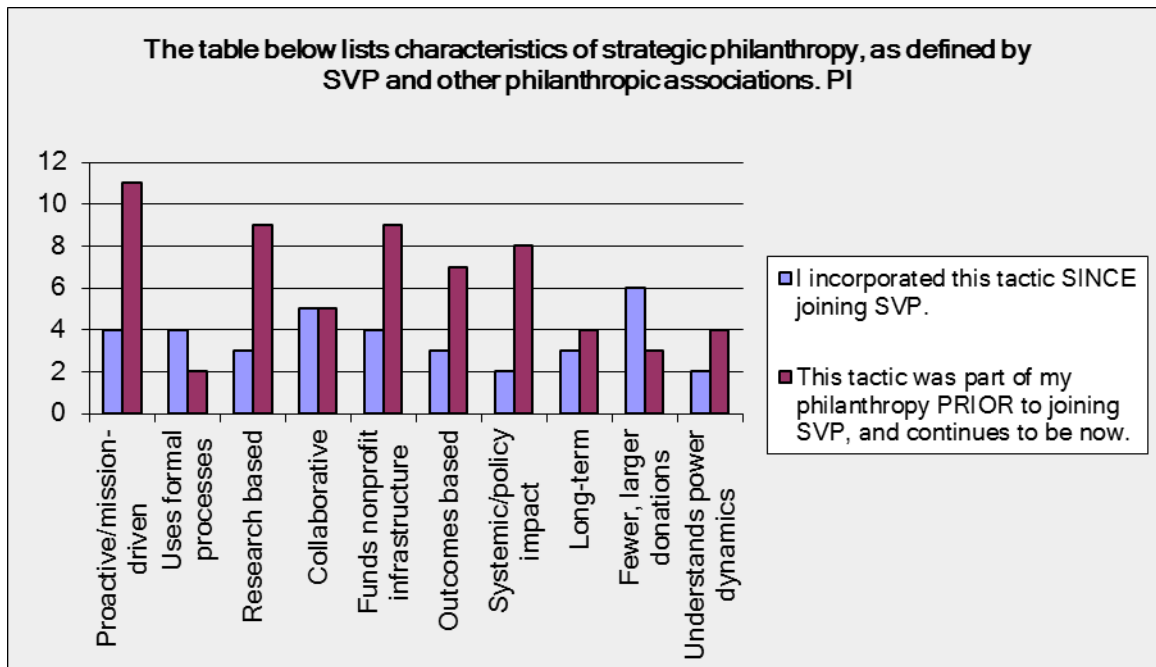o   Involvement in the community NOT associated with SVP (50%)

We also inquired as to *which particular aspect of Partners' involvement with SVP had the most impact on their change*. The most common responses were:
o   Serving on a the Portfolio Grant Committee (62%)
o   Volunteering with an Investee (23%)

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B. Changes in Strategic Giving

Although we are interested in changes to the amount of money people give, the primary focus of our work is to impact the quality of how people give. Based on a review of literature in the field, we have identified a list of ten criteria of strategic giving. These include: proactive/mission driven; uses formal processes; research-based; collaborates with others; funds nonprofit infrastructure; outcomes-based; focus on systemic/policy impact; long-term approach, writes fewer, larger checks; and understands power dynamics. The definitions of the criteria and the sources that informed their selection may be found in Appendix A. Referring to these standards on strategic giving, we asked Partners about which ones they applied regularly in their giving both prior to and since joining SVP.

o   Prior to joining SVP, Partners applied an average of 3.9 out of these 10 strategic giving principles in their personal philanthropy; **since joining SVP, Partners applied an average of 6.1**. This represents an increase of 56%.

o   The three most frequently practiced strategic giving strategies among our SVP Partners today are:
   o   Proactive/mission-driven (94%)
   o   Funds nonprofit infrastructure (81%)
   o   Researched based (75%)

o   The least frequently practiced strategies are:
   o   Uses formal processes (38%)
   o   Understands power dynamics (38%)

o   The attribute that shows the biggest change from before SVP to after SVP is:
   o   Uses formal processes (from 33% prior to joining SVP to 66% after)

The table below lists characteristics of strategic philanthropy, as defined by SVP and other philanthropic associations. PI

Legend:
- I incorporated this tactic SINCE joining SVP.
- This tactic was part of my philanthropy PRIOR to joining SVP, and continues to be now.

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SVP's Role

Among those Partners that identify themselves as becoming more strategic in their giving, 82% said their involvement with SVP had at least some impact on that change. This number can be further broken down as follows:

o   41% said their involvement with SVP had *some* impact on the way they give
o   18% said their involvement with SVP had *significant* impact on the way they give
o   24% said their involvement with SVP was the *primary* factor in changes in the way they give

We asked those Partners to identify the two factors had the greatest influence on changes to their giving. The most common responses were:

o   Involvement with SVP (69%)
o   Involvement in the community not associated with SVP (50%)

We also inquired as to *which particular aspect of Partners' involvement with SVP had the most impact on changes in their strategic giving.* The most common responses were:
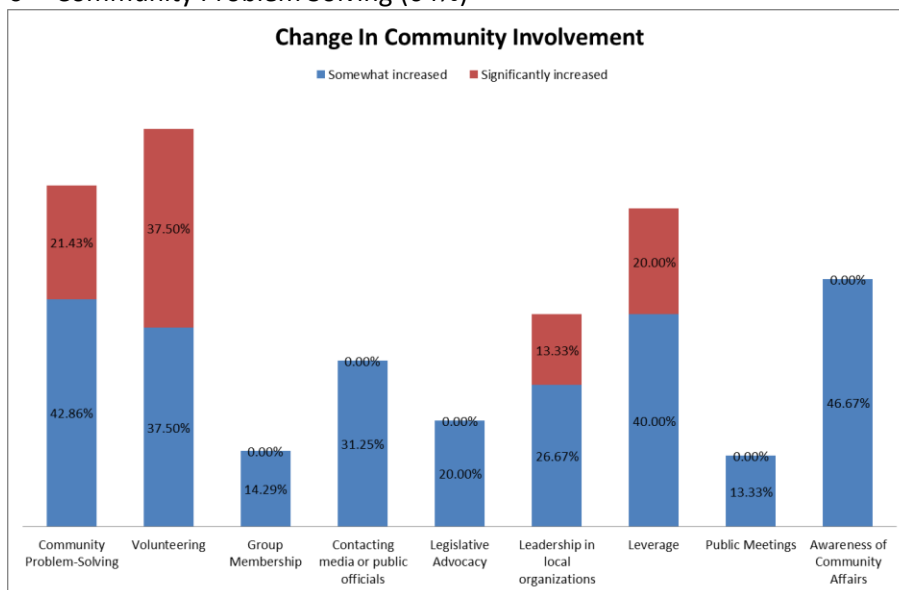
o   Serving on an internal SVP committee or the SVP board (33%)
o   Serving on a Portfolio Grant Committee (25%)

C. Changes in Community Involvement

Through their involvement with SVP, Partners often become more engaged in their local communities. Based on a review of literature in the field, we have identified a list of nine criteria of community involvement. These include: community problem solving, volunteering, group membership, contacting media or public officials, legislative advocacy, leadership in local organizations, leverages resources, participates in public meetings, and awareness of community affairs. The definitions of these criteria and the sources that informed their selection may be found in Appendix B. Referring to these standards on community involvement, we asked Partners about whether and how their level of engagement in their local communities had changed.

The two aspects of community involvement where Partners most often cited that their involvement had increased were:

o   Volunteering (75%)
o   Community Problem Solving (64%)

Change In Community Involvement

Somewhat increased   Significantly increased

21.43%	37.50%					20.00%		0.00%
42.86%	37.50%	0.00%	0.00%	0.00%	13.33%	40.00%	0.00%	46.67%
		14.29%	31.25%	20.00%	26.67%		13.33%	

Community Problem-Solving | Volunteering | Group Membership | Contacting media or public officials | Legislative Advocacy | Leadership in local organizations | Leverage | Public Meetings | Awareness of Community Affairs

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SVP's Role

Among those Partners that identify as becoming more involved in their communities, 86% said their involvement with SVP had at least some impact on that change. This number can be further broken down as follows:

o   35% said their involvement with SVP had *some* impact on their change community involvement
o   29% said their involvement with SVP had *significant* impact on their change in community involvement
o   12% said their involvement with SVP was the *primary* factor in changes in their community involvement

We asked those Partners to identify the two factors had the greatest influence on changes to their giving. The most common responses were:
o   Involvement with SVP (79%)
o   Involvement in the community not associated with SVP (50%)

We also inquired as to *which particular aspect of Partners' involvement with SVP had the most impact on their change in community involvement*. The most common responses were:
o   Volunteering with an Investee (38%)
o   Serving on an internal SVP committee or the SVP board (23%)
o   Serving on a Portfolio Grant Committee (23%)

<u>Partner Survey Appendix A: Definitions for Strategic Giving</u>
The strategic giving criteria 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*

<u>Strategic Giving Criteria</u>
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 criteria 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.

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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.

Writes fewer, larger checks: 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.

Partner Survey Appendix B: Definition for Community Involvement

The community involvement criteria 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 recently completed by The California Wellness Foundation)

Community Involvement Criteria

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.

Participates in Public Meetings: 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.

Thank you!

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