

S O C I A L  
V E N T U R E  
P A R T N E R S  
S E A T T L E

*Invest. Engage. Achieve.*

Philanthropy Development Outcomes  
& Partner Experience

2005

[www.svpseattle.org](http://www.svpseattle.org)  
[www.svpi.org](http://www.svpi.org)

## INTRODUCTION & TABLE OF CONTENTS

Social Venture Partners (SVP) has a dual mission - developing philanthropy and volunteerism among its members (partners) and building the capacity of nonprofit organizations (investees). This report explores SVP Seattle's effectiveness in developing philanthropic skills, knowledge and community involvement among our Partners.

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 three key outcomes:

- Changes in the way Partners give (Strategic Giving)
- Changes in Partners' involvement in their communities (Community Involvement)
- Changes in how much Partners give (Amount of Giving)

In addition, the report addresses the demographic make-up of the partnership, participation and satisfaction levels of Partners, and their assessment of the work SVP does.

Data was collected through (1) an online survey administered in October, 2005 (57% response rate / 165 respondents), and (2) pre- and post-tests given to the 2005 new grants committees.

### Survey Limitations

The data that follows paints a meaningful and important portrait of SVP's impact in our work in promoting and developing philanthropy. It is nonetheless important to acknowledge that information about changes in partner giving and community involvement are self-reported. In most cases, we would expect Partners' perceptions of changes to reflect the actual changes; however, it is possible that in some cases, the data may be skewed by the subjective nature of self-reporting.

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## **PARTNER EXPERIENCE AND BACKGROUND**

### **Q1: How long have you been a partner at SVP?**

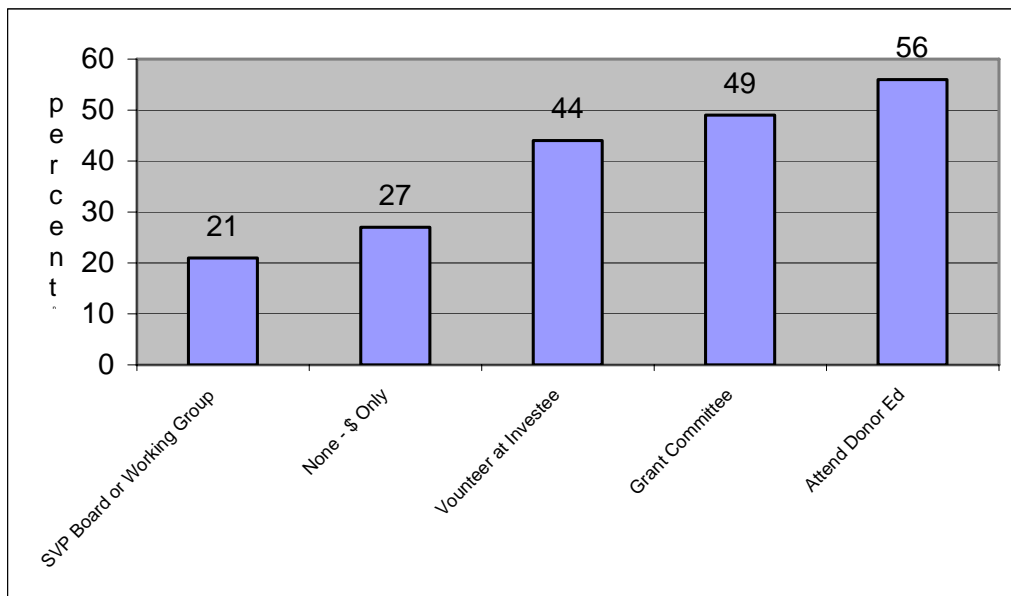
This chart compares respondents' answers with the actual make-up of the partnership:

	Survey Response	Actual Make-up
0-1 Year	14%	14%
1-2 Years	14%	14%
2-3 Years	11%	10%
3-4 Years	13%	14%
4-5 Years	9%	16%
Over 5 Years	39%	32%

The survey respondents correlate strongly with the actual make-up of the partnership for this data point.

### **Q2: In which of the following SVP activities, if any, have you been involved since you joined?**

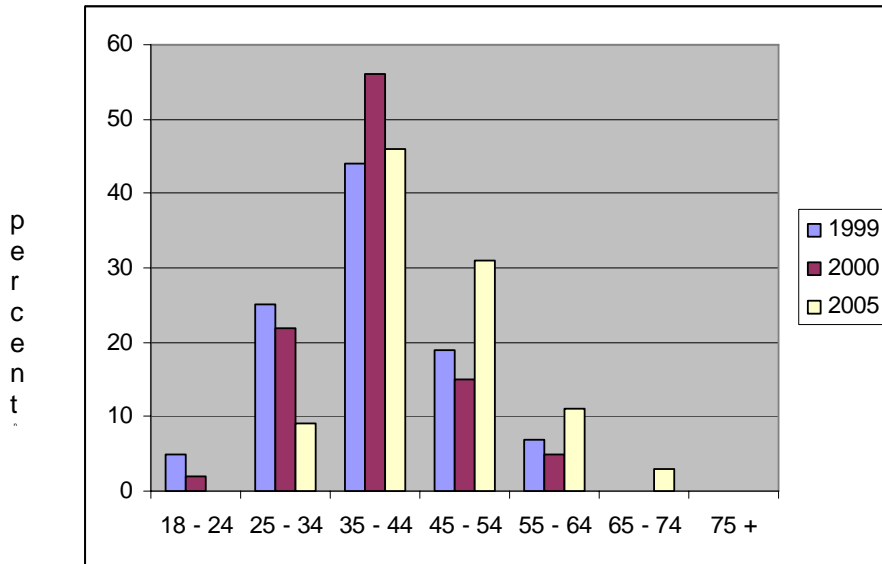
Percent of respondents who have participated in each activity:



The 27% who report not yet participating in any activities correlates with the 30 – 35% we know have not engaged. We had anticipated more active partners to be over-represented in the survey, but this does not appear to be the case.

### Q3: Age

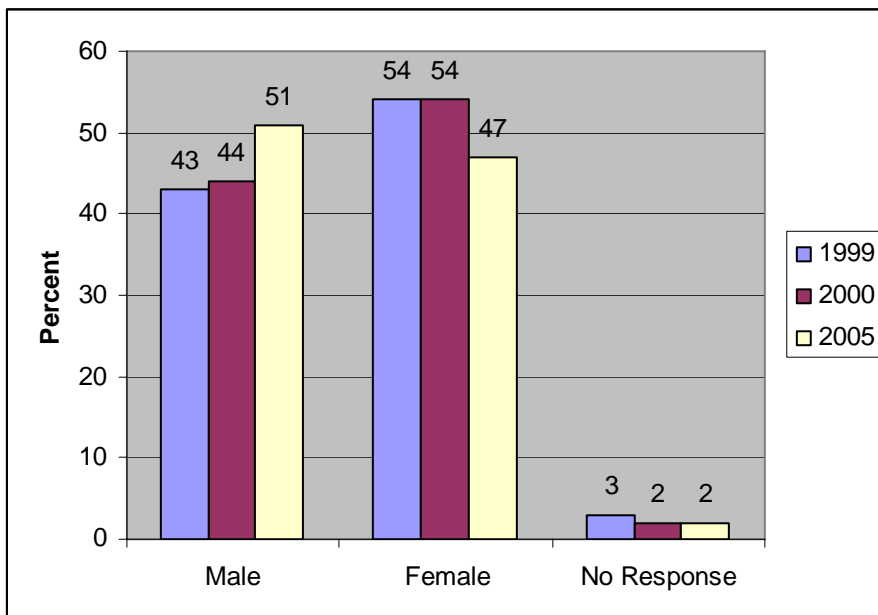
Percentage of respondents who are in each age group:



It appears the partnership is aging.

### Q4: Gender

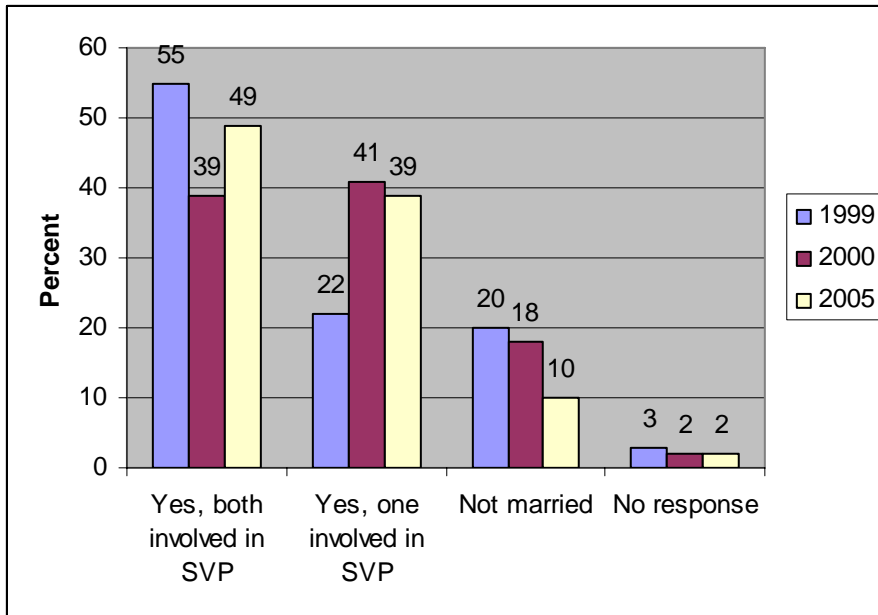
Percentage of respondents who are:



For the first time there were more male respondents than female.

### Q5: Married / Partner?

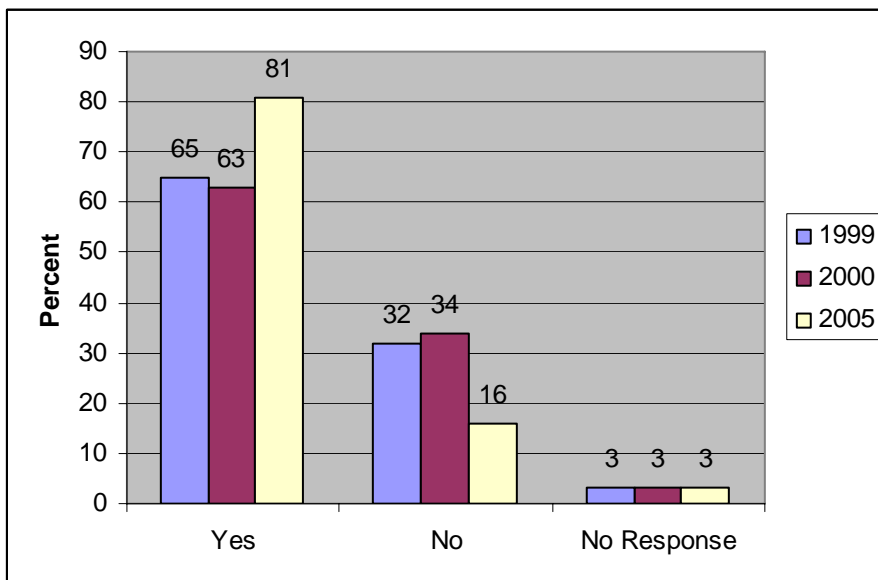
Percentage of respondents who are married and spouse involvement:



Respondents in 2005 are more likely to be married, and there is an increase from 2000 in the number of partners in which both parties are engaged.

### Q6: Children?

Percentage of respondents who have children:



Significantly more partners report having children than in past surveys.

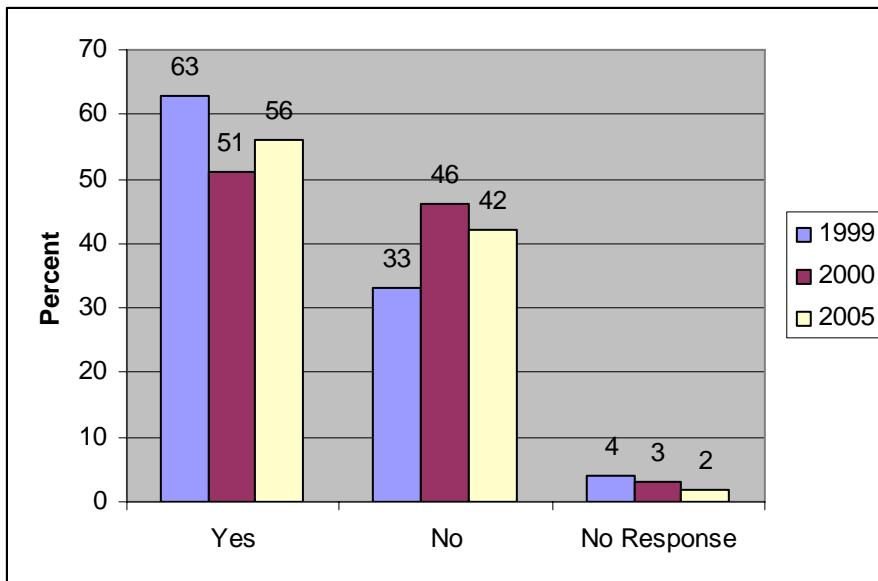
**Q7: If you have children, what are their ages?**

The average age of respondent's children is 12. The median is 10. The oldest is 45 and the youngest is an infant. There are 56 kids between 13 and 18 (SVK age).

In addition to the age question, we can extrapolate that 28 respondents have one child, 69 have two, 32 have three, and 5 have four.

**Q8: Currently employed?**

Percentage of respondents who answered:

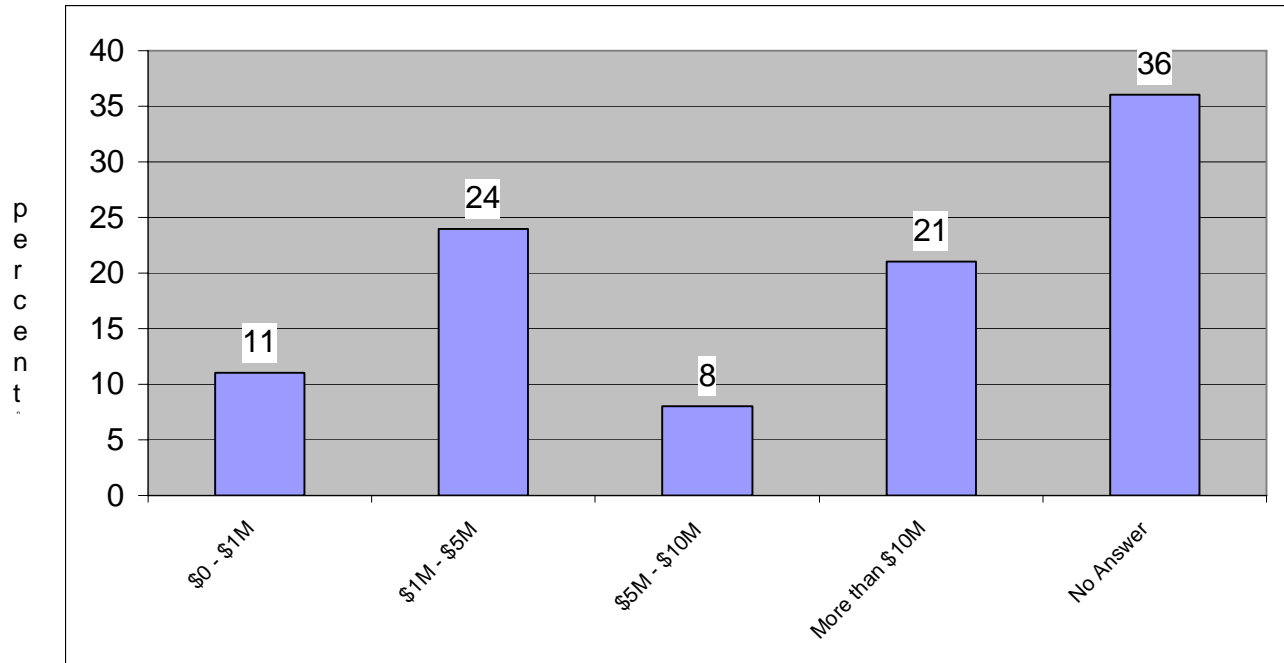


**Q9: Is your annual contribution to SVP your largest, or among your largest, philanthropic contributions?**

52% of respondents answered yes with 48% answering no. This particular statistic should have implications for the partner recruiting and partner engagement working groups, as well as for general communications and messaging. The number answering yes is much higher than expected.

### Q10: Estimated Household Wealth / Net Worth

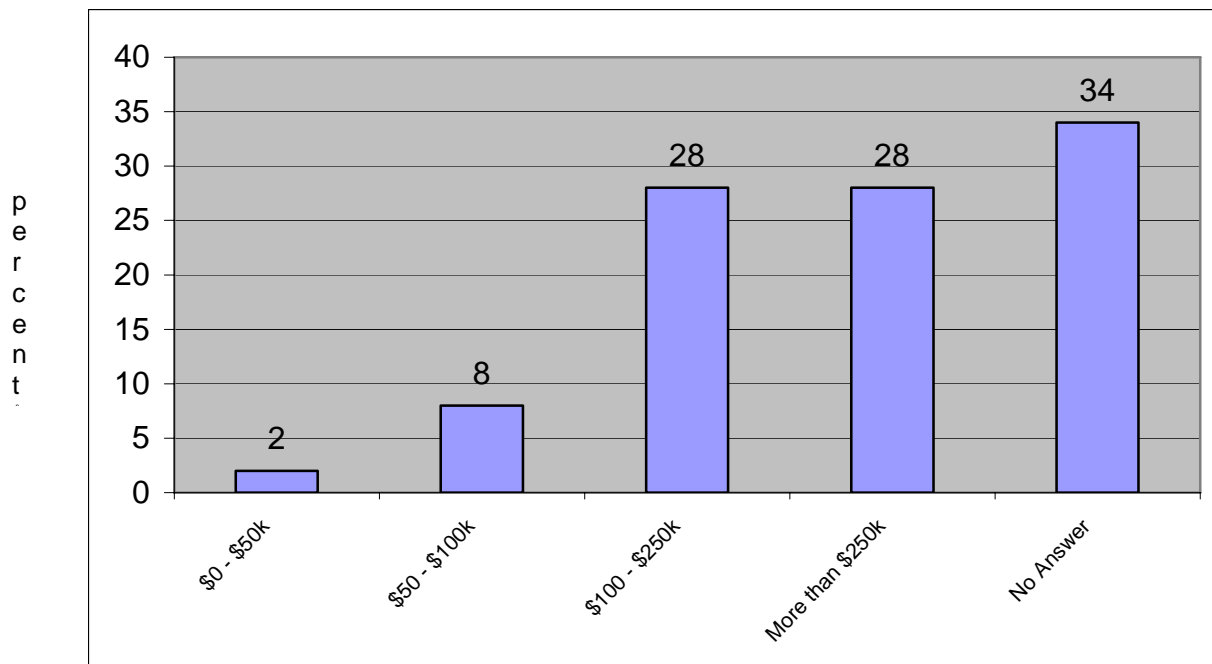
Percentage of respondents who responded that estimated household wealth is:



More than a third of respondents chose not to answer this question. We should consider adding a short paragraph explaining why this information is helpful in order to encourage more answers. We could also make the survey anonymous as opposed to confidential.

### Q11: Estimated Annual Income

Percentage of respondents who responded that estimated annual income is:



More than a third of respondents chose not to answer this question. We should consider adding a short paragraph explaining why this information is helpful in order to encourage more answers.

**Q12: Race**

The following table compares survey responses to what we know about the makeup of the entire partnership to King County 2000 census data (all numbers are percentages):

	<b>Respondents</b>	<b>Partnership</b>	<b>King County</b>	<b>Household Income &gt; \$100,000 *</b>
<b>Other</b>	1			
<b>No Answer</b>	1			
<b>Latino or Hispanic</b>	0.5	1	5.5	2
<b>White</b>	91	91	75.7	87
<b>Native Hawaiian or Other Pacific Islander</b>	0	0	0.5	0.1
<b>Black or African American</b>	0	1	5.4	2
<b>Asian</b>	8	6	10.8	8
<b>American Indian or Alaska Native</b>	0.5	1	0.9	0.3

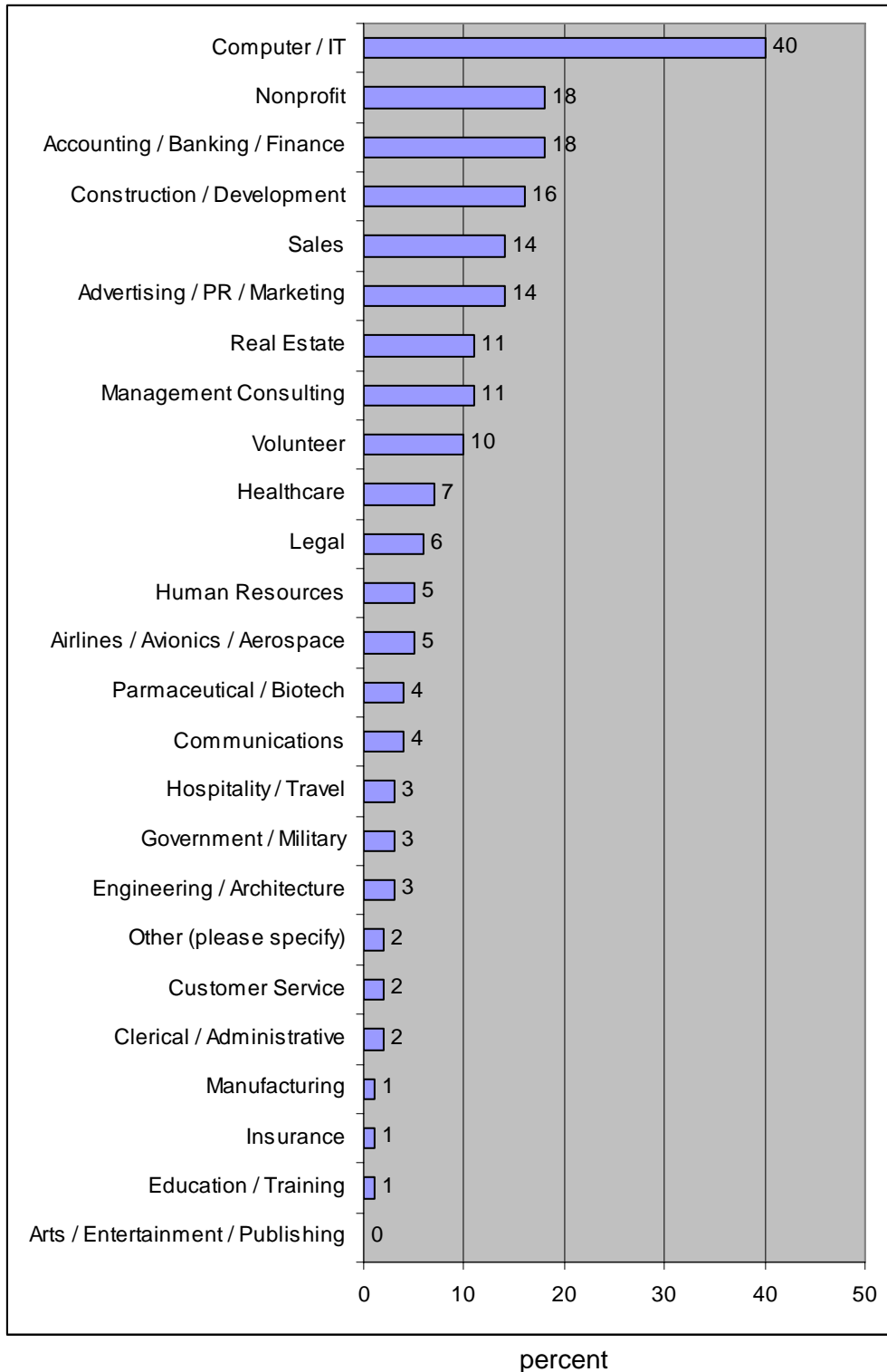
\* Percentage of all households with an income of > \$100,000 in King County that self-identify as a particular race. The comparison isn't perfect because the first three columns (respondents, partnership and King County) are percentages of individuals, while the household income column is based on households.

Respondents could choose more than one category, so the total is more than 100%. The numbers fairly reflect what we know about the partnership, except that we do have around 1% Black or African American as well.

This is the first time we have asked this question. This particular statistic should have implications for the partner recruiting and partner engagement working groups, as well as for general communications and messaging.

**Q13: Professional background:**

Percent of respondents who report working or having worked in:



Respondents could choose more than one category, so the total is more than 100%. Many respondents chose more than one category, as choices include both profession and industry. We will separate the two in future surveys. While the largest category of respondents chose Computer / IT, the diversification trend is encouraging. Particularly interesting is the number of respondents who indicated experience in the nonprofit sector. Diversity in profession is important for both the partnership (learning from each other) and investees (skilled volunteers in a variety of areas).

# STRATEGIC GIVING

## Changes In Strategic Giving

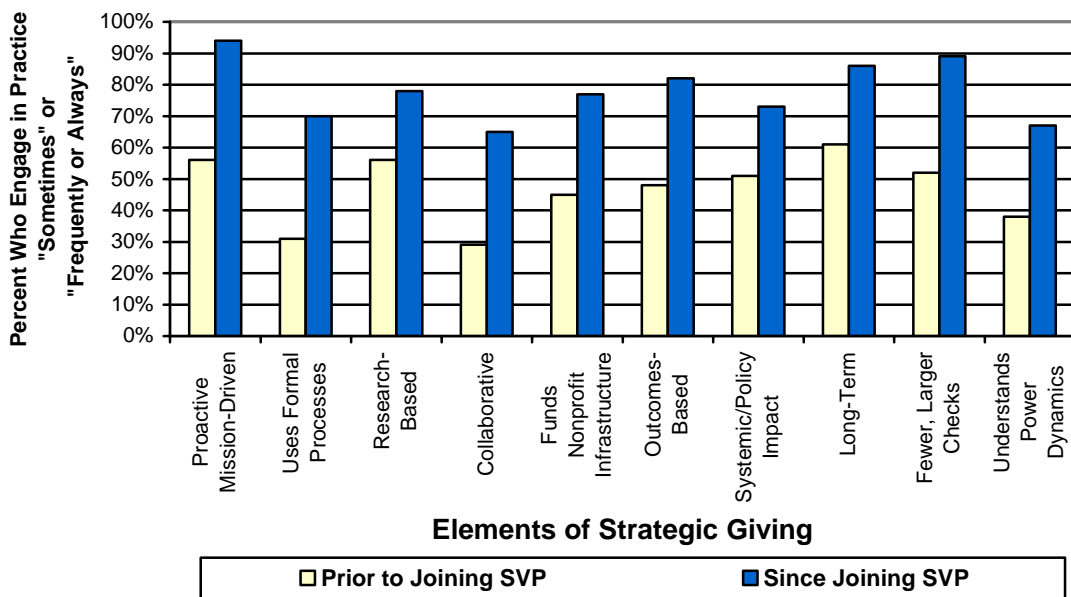
Although we are interested in changes to the quantities people give, the primary focus of our work is to impact the quality of how people give. Based on a review of literature in the field, we have identified a list of ten criteria of strategic giving. These include: proactive/mission driven; use of formal processes; research-based; collaborative; funding nonprofit infrastructure; outcomes based; systemic/policy impact; long-term; writing fewer, larger checks; and understanding 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.

- Prior to joining SVP, Partners applied an average of **4.6** out of these **10** strategic giving principles in their personal philanthropy “sometimes” or “frequently or always”; since joining SVP, Partners applied an average of **7.6**. This represents an increase of 65%.
- The two strategic giving practices our SVP Partners most often cited as engaging in “sometimes” or “frequently or always” since joining SVP are:
  - Being proactive/mission-driven (94%)
  - Writing fewer, larger checks (89%)
- The least frequently practiced strategy is:
  - Funding collaboratively (65%)
- The attribute that shows the biggest change from before SVP to after SVP is:
  - Using formal processes (31% prior to joining SVP to 70% after)

Q14:

### Changes in Strategic Giving



## SVP's Role in Changes in Strategic Giving

**Q15:** Among those Partners that identify as becoming more strategic in their giving, **98%** said their involvement with SVP had at least some impact on that change. This number can be further broken down as follows:

- 56% said their involvement with SVP had **some** impact on the way they give
- 30% said their involvement with SVP had **significant** impact on the way they give
- 12% said their involvement with SVP was the **primary** factor in changes in the way they give

**Q16:** We asked those Partners to identify the two factors had the greatest influence on changes to their giving. The most common responses were:

- Involvement with SVP (69%)
- Other involvement in the local community (52%)

**Q17:** 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:

- Serving on a grant committee (44%)
- Attending donor education seminars (19%)

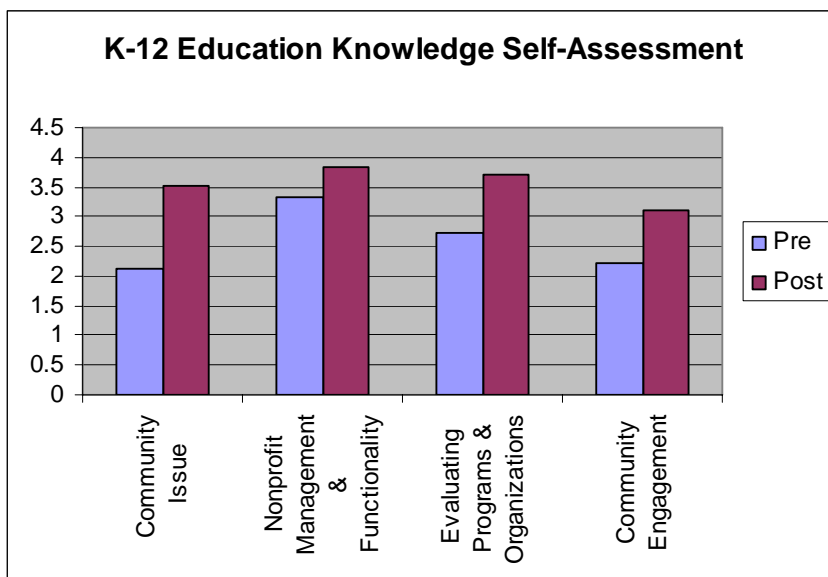
## New Grant Committee Outcomes and Satisfaction

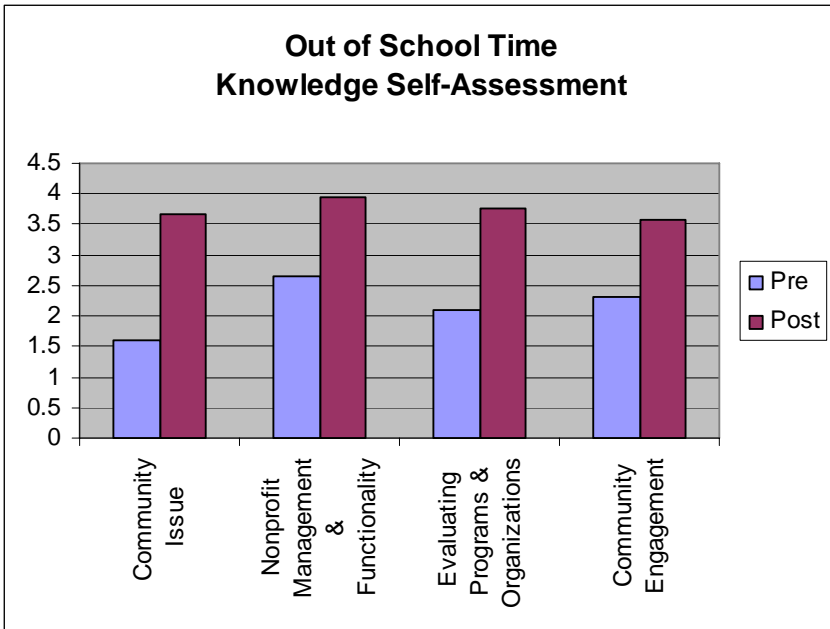
New Grant Committees filled out pre and post surveys to measure changes in the following areas:

- Knowledge about the issue area
- Knowledge about nonprofit management and functionality
- Knowledge about evaluating programs and organizations
- Knowledge about community engagement

The survey included both self-assessment and an actual knowledge audit. 18 out of 24 responded. See [Appendix D](#) for complete survey questions.

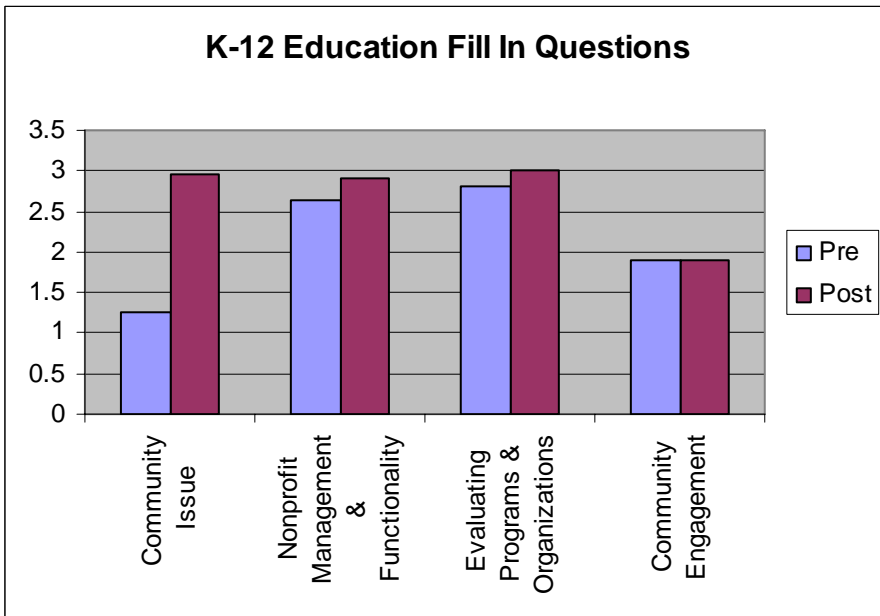
**Q18:** The self-assessment section asked committee members to rate themselves on a scale of 1 (I don't know a lot about this. I am eager to learn more) to 5 (I know quite a bit about this. I consider myself a peer leader).

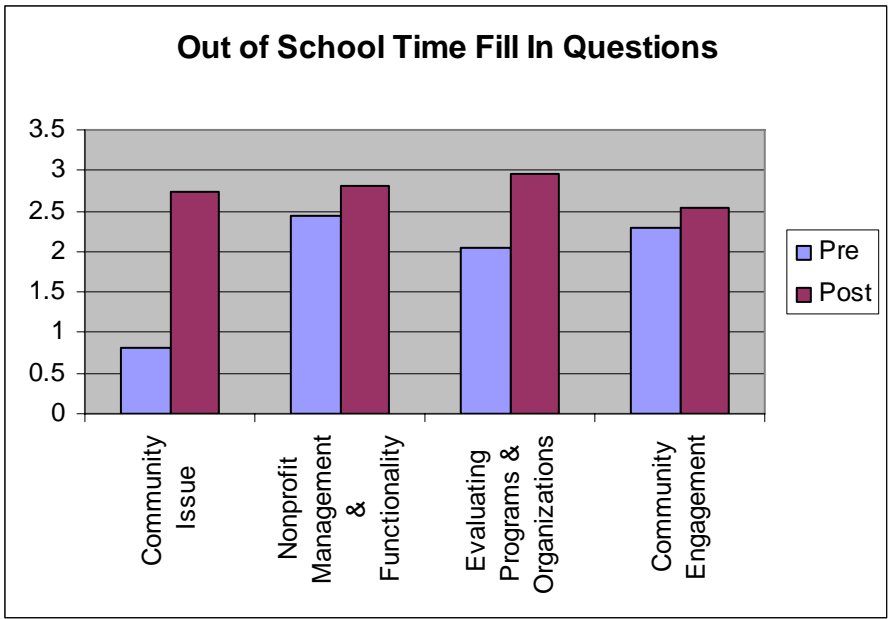




- We see increases in all areas from pre to post
- Biggest increase is in knowledge about the issue areas

**Q19:** The knowledge audit section asked committee members to fill in three answers to a variety of questions which were then reviewed by staff.





- At the start, Partners scored lowest on the issue area knowledge for both committees
- We see increases in all areas except one (community engagement for K-12) from pre to post
- Biggest increase in knowledge about a community issue

Committee members also completed a short evaluation of the process itself. 16 out of 24 responded to this portion.

**Q20:** Using the chart below, how much did you learn about the following as a result of the grant committee process (such as from Letter of inquiry review, panel discussions, or site visits)?

	Number of Partners who responded . . .			
	Didn't learn much	Learned something	Learned a lot	Would liked to have learned more
K-12 or Out of School Time Issues		2	13	4
Nonprofit organizations in general and the challenges they face	1	8	7	
K-12 or OOST nonprofits and their work		9	7	1
Grantmaking and philanthropy	1	7	8	2

Those who indicated “didn’t learn much” and a few who indicated “learned something” said they came into the process already knowing quite a bit.

**Q21:**

Overall, how satisfied are you with your experience?	Number of Partners who responded . . .				
	Exceeded expectations	Good use of time	So-so	Somewhat disappointed	Very disappointed
	9	7			

**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, leverage, public meetings, and awareness of community affairs. The definitions of the 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 community involvement activities our SVP Partners most often cited as engaging in “sometimes” or “frequently or always” are:

- Volunteering (92%)
- Awareness of Community Affairs (89%)

The least often cited community involvement activity is:

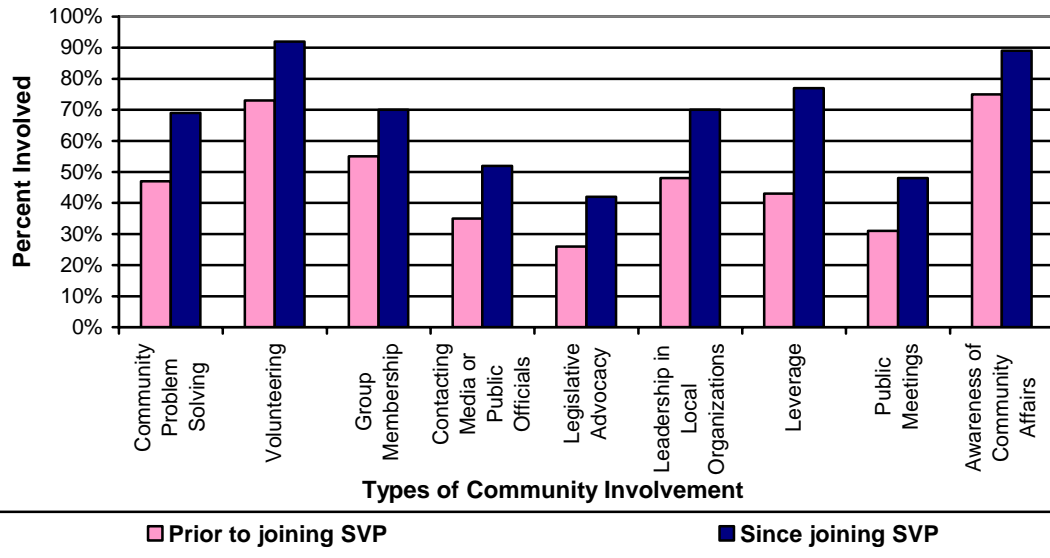
- Legislative Advocacy (42%)

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

- Leverage (43% prior to joining SVP to 77% since)
- Community Problem Solving (47% prior to joining SVP to 69% since)
- Leadership in local organizations (48% prior to joining SVP to 70% since)

**Q22:**

### Changes in Community Involvement



### SVP’s Role in Changes in Community Involvement

**Q23:** 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:

- 71% said their involvement with SVP had **some** impact on their change community involvement
- 14% said their involvement with SVP had **significant** impact on their change in community involvement

- 1% said their involvement with SVP was the **primary** factor in changes in their community involvement

**Q24:** We asked those Partners to identify the factors that had the greatest influence on changes to their community involvement. The most common responses were:

- Involvement with SVP (64%)
- Other involvement in the local community (61%)

**Q25:** 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:

- Serving on a grant committee (30%)
- Volunteering with an investee (23%)

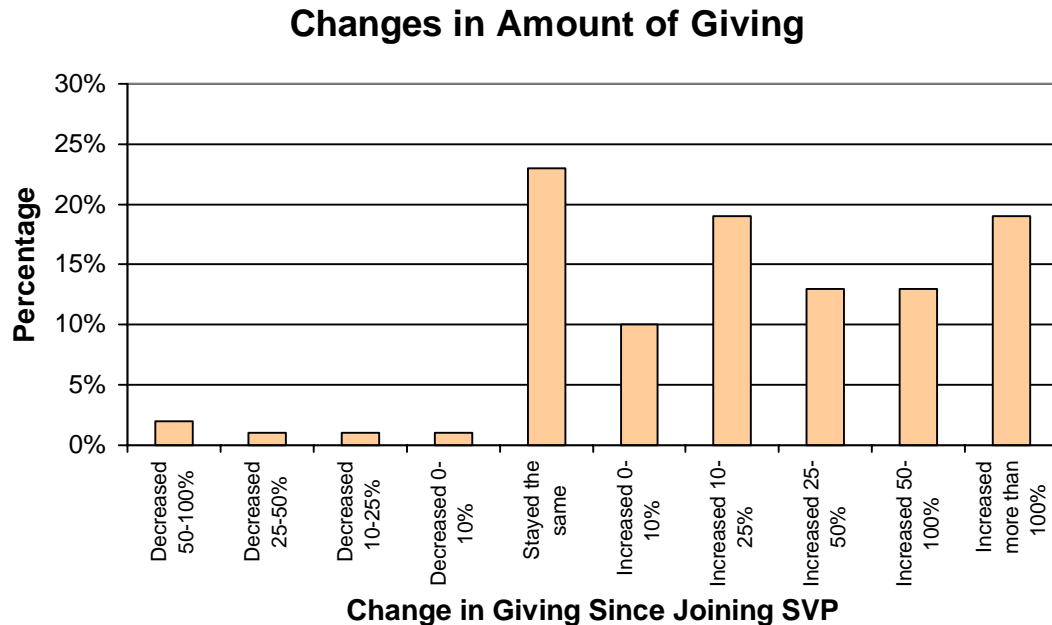
See [Appendix C](#) for some additional data points on strategic giving and community involvement.

## AMOUNT OF GIVING

**Q26:** Tracking changes in the amount of giving is important because it establishes whether or not involvement with SVP has any actual impact on increasing the amount of philanthropic dollars in the community.

- In 2005, we found that 73% of Partners who responded reported increased giving since joining SVP, 23% stayed the same, and 4% decreased.

This table provides a more specific breakdown according to how much partner giving had changed since joining SVP:



### SVP's Role in Changes in Amount of Giving

**Q27:** Among those Partners whose giving level had changed, **80%** said their involvement with SVP had at least some impact on that change. This number can be further broken down as follows:

- 57% said their involvement with SVP had **some** impact on their change in giving
- 15% said their involvement with SVP had **significant** impact on their change in giving
- 8% said their involvement with SVP was the **primary** factor in changes in their giving

**Q28:** We asked those Partners to identify the two factors that had the greatest influence on changes to their giving. The most common responses were:

- Involvement with SVP (49%)
- Other involvement in the local community (47%)

**Q29:** 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:

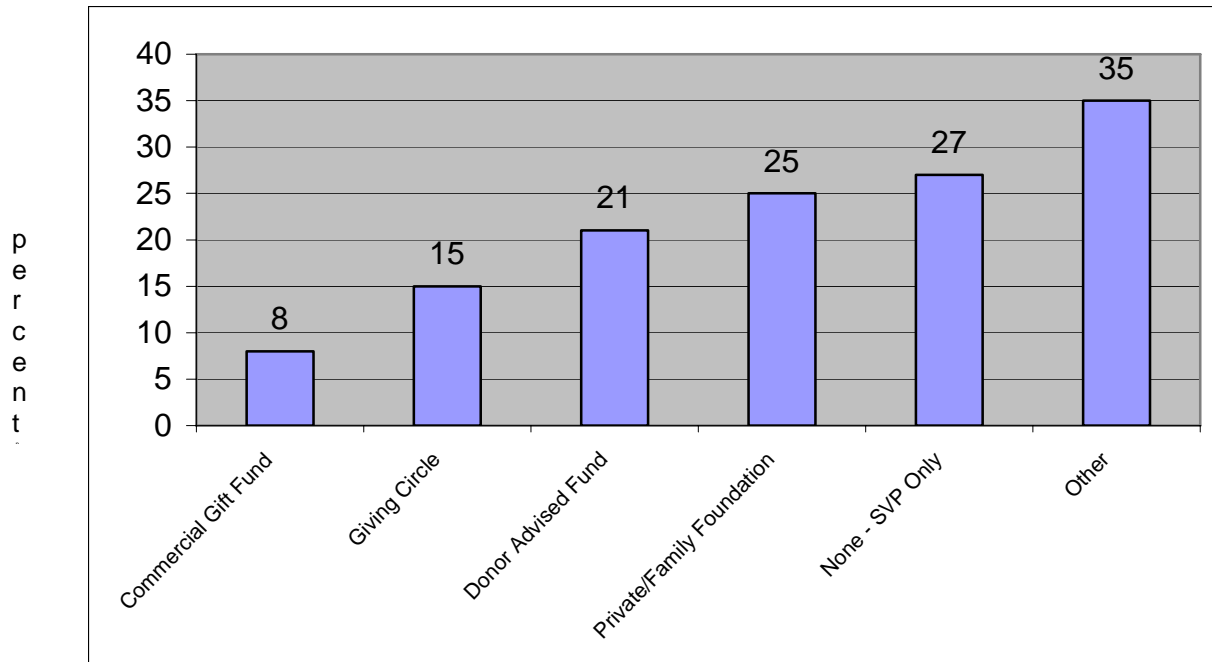
- Serving on a grant committee (27%)
- Volunteering with an investee (20%)
- Attending donor education seminars (20%)

## Ripple Effect

This section explored what “ripple effect” SVP may have on partners’ giving in our community. The data continues to support the conclusions drawn by the 2002 Blueprint evaluation that participation in SVP encourages participation in other forms of organized philanthropy and results in a greater portion of contributions going to local organizations.

### Q30: With what other forms of organized philanthropy are you involved, if any?

Over 70% of respondents participate in some other form of organized philanthropy in addition to SVP.



Of those who answered “other,” the most common responses were

- Volunteering, including board service and fundraising (mentioned by 62%)
- Other community or public foundations such as Washington Women’s Foundation (9%)
- United Way (7%)
- Church (5%)

It is good to see that so many respondents think of and participate in board service and fundraising as part of their philanthropy. We should consider adding this choice to the survey.

For comparison, the following excerpt is from the 2002 Blueprint Report:

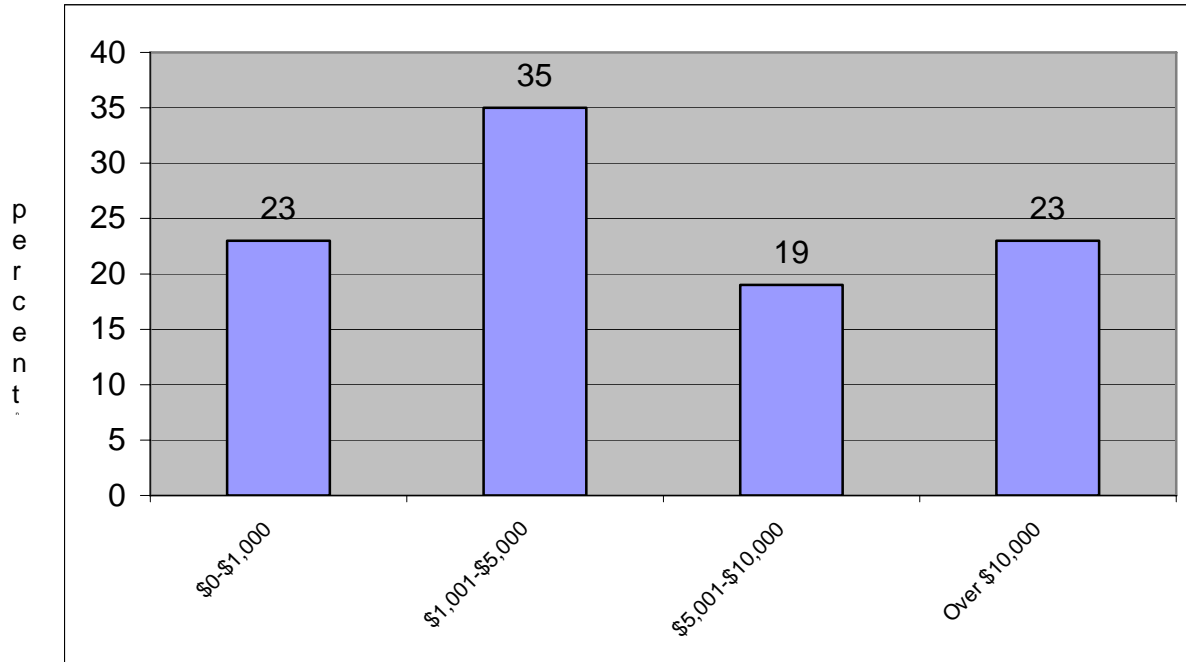
When SVP began, some existing philanthropic organizations in town worried that it might siphon off some of their clients. In fact, interviews with Partners suggest SVP may actually be generating business for them. By encouraging Partners to learn more about philanthropy and become more effective in their giving, SVP encouraged Partners to become more involved in other groups as well. Among the Partners interviewed, 75% had no involvement with organized philanthropy before joining SVP. 25% of the Partners interviewed became involved in another form of organized philanthropy while being active in SVP . . . Currently 42 SVP households also have a fund at the local community foundation. And at least 46 SVP members also belong to at least one of two other giving circles in town.

**Q31: Have you directly funded an organization that you learned about through SVP?**

47% answered yes, 53% no.

**Q32: If yes, what was the range of amount contributed?**

Percentage of respondents who gave indicated amounts:



Respondents report giving between \$360,000 and \$571,000 to organizations learned about through SVP.

**Q33: Have you encouraged others to donate funds to or volunteer with an organization you learned about through SVP?**

61% answered yes, 39% answered no.

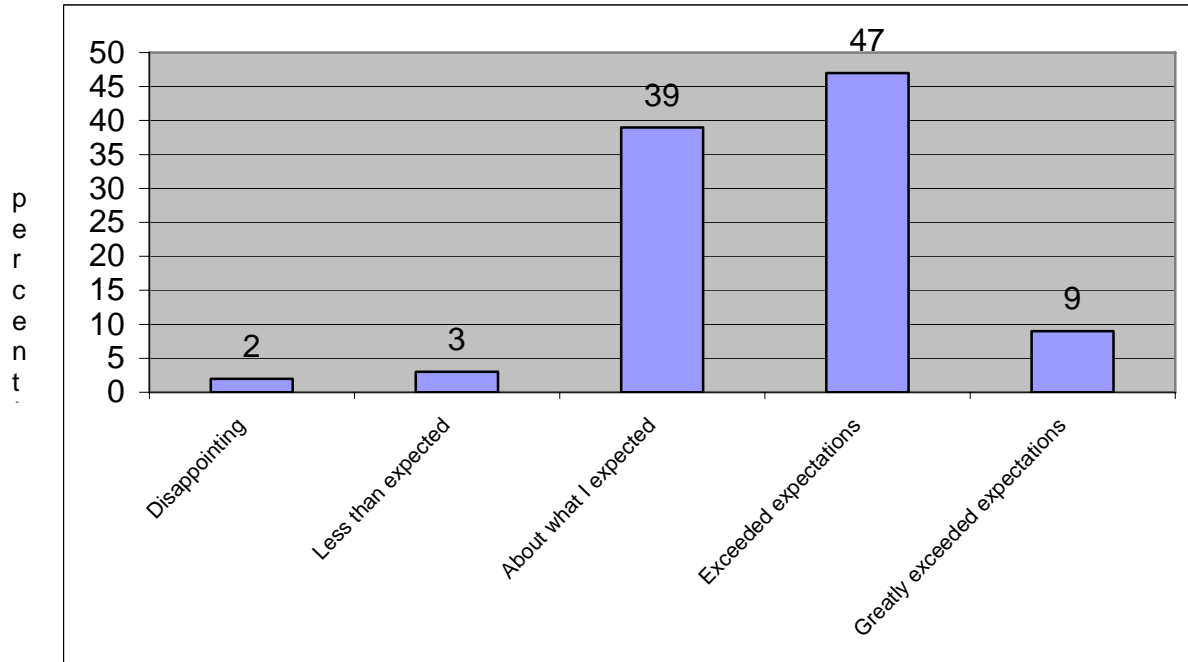
For comparison, the following excerpt is from the 2002 Blueprint report:

*Partners focused a greater portion of their philanthropic contributions on local organizations. Many Partners said that over time, they had been channeling a larger proportion of their personal donations to local organizations, primarily because their SVP activities introduced them to strong organizations doing work in their interest areas. However, SVP has no way of knowing whether increased Partner contributions to local organizations are coming at the expense of their other philanthropic giving since it does not track total giving among Partners. In general, Partners talked more about how SVP influences where they gave their money than how much they gave.*

The data in the following section indicates that the increased focus on local organizations has not come at the expense of their other giving.

## PARTNER SATISFACTION AND EXPERIENCE

**Q34:** 56% (vs. 43% and 47% in previous surveys) say their experience exceeds their original expectations and 39% of Partners (vs. 45% and 46% in previous surveys) say their experience meets their expectations. SVP has been able to sustain and even improve the level of satisfaction, a positive sign of organizational health.



<b>Q: How would you rate your overall experience with SVP?</b>	<b>1999</b>	<b>2000</b>	<b>2005</b>
Much less than expected	11%	4%	2%
Somewhat less than expected		3%	3%
About what I expected	46%	45%	39%
Exceeded my Expectations		43%	47%
Greatly Exceeded my Expectations	43%	5%	9%

### Q35: What has been your most satisfying experience with SVP?

99 Partners answered. Partners reported most satisfaction with:

1. participating in a grant committee (mentioned by 33% of respondents)
2. providing strategic volunteer support to an investee (26%)
3. interacting and connecting with other Partners (22%)
4. taking part in philanthropy development workshops and seminars (17%)

These are the same responses as in previous surveys. Also mentioned were working with staff, participating on internal working groups, and for the first time, the model itself and the SVPI conference! This was the first year that several respondents mentioned the model as a whole as a source of satisfaction.

Here is a sampling of verbatim responses:

*Volunteering directly with a non profit.*

*Serving on a grant committee and experiencing the high level of partnership involvement, staff management of the process, and community participation in the process.*

*Partner Ed, specifically those that allow for discussion w/other partners.*

*Helping an investee start a program and "graduate" with honors. Helping SVP develop new processes (PGC) and policy (Board) to enhance the development of the organization.*

*I now find the on-going email communications on topics related to philanthropy very helpful. I also have been very satisfied with the quality of the staff.*

*Internal Partner Education Committee, SVPI Conference*

*Watching the incredible impact locally and nationally, and witnessing the number of individuals who have become committed philanthropists through their involvement in SVP*

*Working with investees and also meeting with other partners who are doing similar work so that we can compare experiences and learn from each other.*

*Being connected to something that extends beyond just one non-profit. I love the fact that SVP enables a much broader level of community involvement than would otherwise be possible. Also very impressed with the people I've met - both other SVP partners and the staff.*

*It has been exciting to see SVP grow so much, from just having a lot of good ideas without much direction, to a mature organization that is being replicated. I feel proud of what SVP has done.*

*I give to SVP because I care about the people SVP serves. The most transformational thing a high net worth person can do for their own health is to give of themselves, learn about the needs and hurt of others and become involved in authentic community. That's what SVP facilitates and that's why I give to SVP.*

### **Q36: What has been your least satisfying experience with SVP?**

72 Partners answered, with 18% saying none. The most mentioned experiences were:

1. The "non-experience" - not having the time to engage in SVP activities and the surrounding guild and frustration (mentioned by 22% of respondents);
2. The SVP "culture" – hard to connect, not primary peer group, isolating, not part of the "club," not having enough in common with partners, feeling too young, hard to break into the old partners group, the "technology pedigree" of the partnership (13%);
3. volunteering at an investee (10%)

Receiving a few mentions each were the issue areas SVP supports, logistics for meetings, not enough social events, philanthropy development sessions, the partner meetings, and, of course, filling out this survey.

The time/guilt response was also the most mentioned in previous surveys. Volunteering has also appeared in previous surveys. The culture response is new, and something SVP should continue to address. A previous dissatisfaction with communications only received one comment this year.

*Ongoing guilt and anxiety about providing nothing but \$\$\$.*

*Not having time to make the most of membership. Also, SVP doesn't address the areas I am most interested in.*

*The historical "technology-pedigree" of the partnership, although this effect has subsided more recently, still plays a role somewhat in SVP Seattle.*

*Going to large SVP gatherings and feeling very isolated, not part of the "club", in the early years of my involvement, before I had opportunity to be engaged in any meaningful way.*

*Not having enough in common w/ the partners. I feel too young and not \$\$ enough to be a partner. It was a real stretch for us to join and I don't feel like anyone else is in the same boat.*

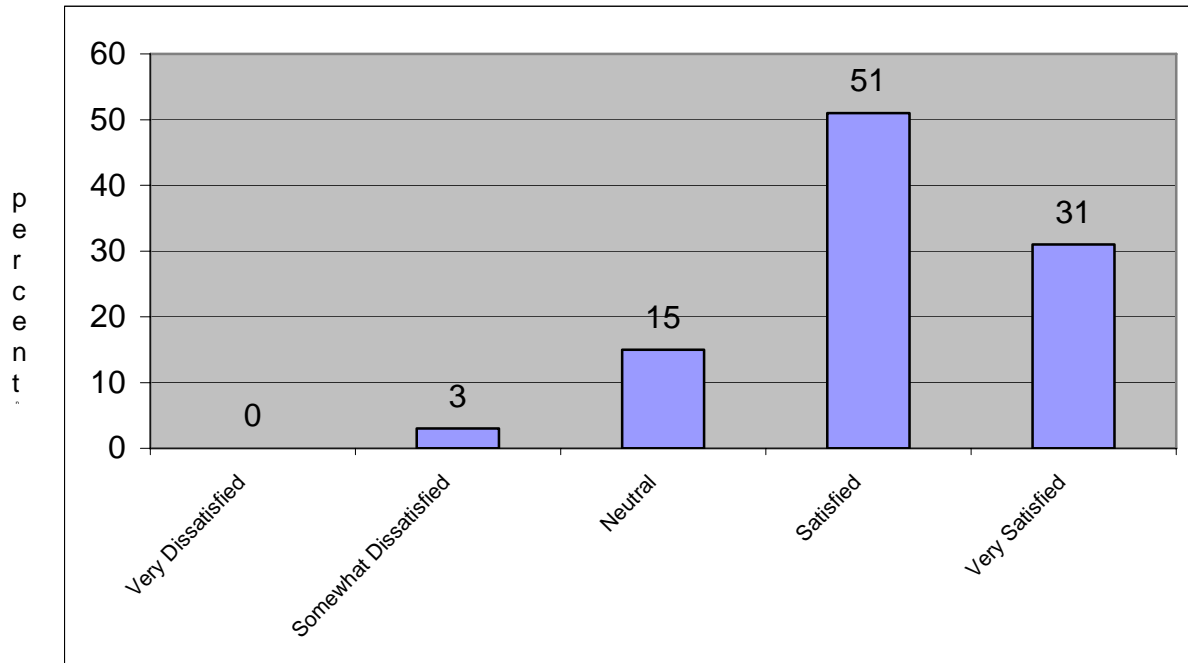
*Volunteering positions that were not fulfilling*

*One of the volunteer assignments - blame to be split between myself and investee.*

*The donor ed stuff is hit or miss. I have been to great stuff, and stuff that is a waste of time.*

*Some of the donor education sessions have been less impactful or educational for me as I have become more knowledgeable about the field of philanthropy.*

**Q37: Overall, how do you feel about the nonprofits SVP supports?**



16 people skipped this question. 82% of respondents were satisfied or very satisfied with the nonprofits SVP supports. 15% were neutral, and 3% were somewhat dissatisfied.

Reasons for dissatisfaction included the following:

*lack of leadership, outcomes*

*In general, I am satisfied, however I am concerned about the lack of professional management skills and board sophistication in some of the nonprofits and I would like to see us be able to impact this more effectively.*

*Would like to see greater diversity beyond environment and children/education.*

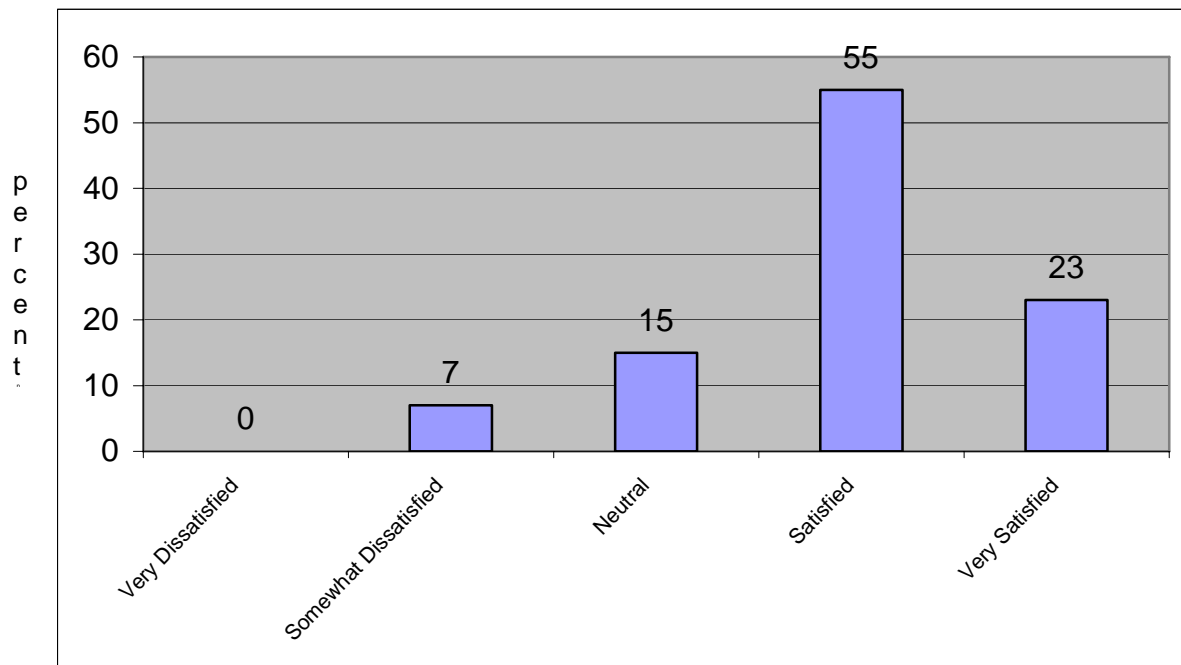
*environment - seems to be a lot of groups in this area and not much differentiation that SVP can offer, compared to pre-school, K-12, and after-school programs where need is great and impact is actually demonstrable.*

*my general opinion of the nonprofits svp supports is very high....but when i think about it i don't think that is an educated opinion. just formed from the sound bites we see of the success stories at partner meetings. i would like to see much clearer / regular reporting on how svp thinks its portfolio of investees is doing and how its work with capacity building is/or is not having an effect.*

*I am perfectly happy to support your investees through my membership. However, the desire to give Partners "hands-on" experience means that investees are very local. My greatest interest is in international giving.*

**Q38: How would you rate your satisfaction with your volunteer experiences?**

32% of respondents reported they had not volunteered. The following graph shows percentage results from respondents who have volunteered:



78% of partners who have volunteered were satisfied or very satisfied with the experience. 15% were neutral and 7% were somewhat dissatisfied.

**Q39: When asked what was most the most satisfying part of their volunteer work, the most mentioned responses were:**

1. the connections made and relationships built with staff at the nonprofit and other partners and volunteers (mentioned by 22% of respondents);
2. the strategic orientation of the volunteering (20%);
3. the visible impact of their volunteering (18%);
4. working directly with kids (13%);
5. the learning they experienced related to nonprofits, social issues and their own abilities (12%)

The top answers in the previous survey were 1) working with a child / youth and seeing the difference you can personally make, 2) learning more about an investee's work or non-profits in general, 3) seeing SVP's work have an identifiable impact on an investee. It is interesting to note that the top two answers from 2005 are new answers.

Here is a sampling of responses:

*Actually seeing that you can do something and that you can move the needle a tad. When you have never done it the whole thing can be a bit mystical and intimidating.*

*It's great to see the direct impact one can have on an organization's thinking.*

*Developing a relationship with the Investee people and seeing the effectiveness of the program with the clients. Also seeing how the work with SVP enhances other aspects of the Investee operations.*

*Understanding infrastructure, resource challenges that the non-profit faces Learning about differences between non-profits and profits Learning new skills / developing new domain knowledge.*

*Direct contact with kids - which gave me new perspective I couldn't have gotten if I hadn't been directly involved.*

*relationships I built with other volunteers and staff. As the staff has moved on to other organizations, the relationships continue to be useful in ongoing philanthropy.*

*Ability to act as a consultant or sounding board for strategic issues, rather than the stuffing-envelopes and folding-clothes type of volunteering.*

**Q40: When asked what was most the least satisfying part of their volunteer work, the most mentioned responses (out of 44) were:**

1. process related - including unclear expectations, hard to connect with lead or other SVP volunteers, lack of guidance, lack of access to previous knowledge, product, etc. (32%)
2. cultural issues – including internal politics at the investee, perceived lack of professionalism on the part of investee staff, communication issues, decision-making and process take too long, resistance from investee staff (21%).

The top answers from the previous survey included 1) struggles in learning to work together with an investee and establish trust between each other, 2) the pace is sometimes too slow, and 3) not enough connection to the overall V-Team and the other work.

Here is a sampling of responses:

*volunteering for an organization that really didn't know what do to with me*

*No good tools for helping me connect with other SVP volunteers*

*Re-inventing the wheel, knowing SVP has had experience multiple times with the same issues, but not having that knowledge meaningfully documented/communicable so as to permit more efficiency, and incremental learning to occur. Staff stretched too thinly to document/develop the knowledge bases/methodologies/processes, and limited in how much time they can give to investees / SVP committees, or individual SVP partners.*

*slow process of change and decision making*

*Getting decisions out of overworked investee staff so that I can get a project finished.*

*some of the non-profit staff can seem cynical of change and profit-world entering to make impact*

*Confusion over the role of the lead partner. It's not clear what his role is and when I should contact him.*

**Q41: When asked what would make the volunteer experience more satisfying, the most mentioned responses (out of 36) were:**

1. better support from both SVP and Investee, including process, role expectations and knowledge management (28%);
2. more connection with lead partner and other SVP volunteers working at the investee (19%)

- 3. more time to volunteer (14%).

Here is a sampling of responses:

*Having clearer expectations on what the job was, and who was the "customer"*

*Shared experiences on similar tasks. Who is helping someone with Strategic Planning right now? What tools and techniques are you using that might help me? Also any information relevant to the program area I am volunteering in.*

*more teamwork and leadership from Partner Leads*

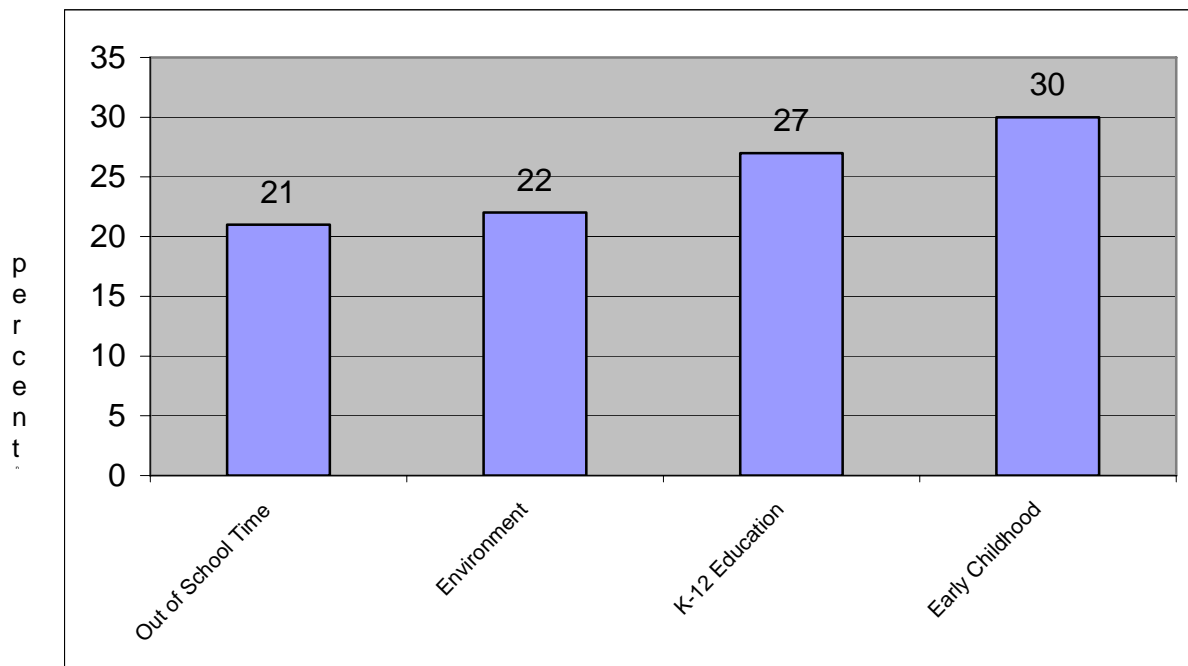
*With respect to the failed volunteer participation on my part referenced above, in retrospect I feel it would have helped to have more regular check ins and general contact with the v-team and lead, to help support and motivate my on-going involvement.*

*more connection with other volunteers working with same investee*

*volunteering is more of a one-on-one experience...i wonder if it could be structured in a way that it has the element of meeting and working with other partners*

### Allocation of Funds

**Q42: Every few years, SVP asks for input from the Partnership on how to allocate pooled funds (not individual donations) to the issues areas SVP supports. For each of our current four issue areas, please provide your preferred allocation by percent.**



### Portfolio Composition:

	Survey Responses	Actual 2006	Estimated 2007
Out of School Time	21	19%	28.5%
Environment	22	24%	19%
K-12 Education	27	19%	24%
Early Childhood	30	38%	28.5%

Over a three to five year period, the actual allocations reflect the desired allocations of the partnership.

**Q43: What other issue areas do you think SVP should consider in the future?**

The most selected issue areas were:	Number of responses:	
	First Choice	Second Choice
• Poverty and Class Issues	13	9
• Homelessness	13	7
• Housing – Affordability and Access	10	10
• Sustainable Development	5	10
• Health Care – Access, Insurance, etc.	7	6
• Public Policy and Advocacy / Influencing Public Opinion	2	12
• Employment Training and Jobs Creation	6	4

While 117 people answered this question, there does not seem to be enough concentrated interest in any one of these areas to warrant adding another issue area at this time. This data will be used to guide workshop offerings and to connect and convene partners around shared interests.

**The Future of SVP**

**Q44: If you were having a great experience in SVP in five years, what would you be doing?**

67 Partners answered. In order of most mentioned, key themes were that Partners would be:

1. Volunteering more with Investees
2. Creating more and stronger connections and relationships with investees and other partners
3. Serving on the Board of or taking another active leadership role at an investee, SVP, or other nonprofit organization
4. Serving on a grant committee
5. Making more time to do more of what they are already doing

Also of note is that four respondents mentioned that they would like to be more involved in the work of the SVPI network over the next five years.

In 2000, 78 Partners answered this question. Key themes were that Partners would have:

- involved my family and kids in philanthropy more fully
- seen that SVP had real impact (outcomes / impact are a recurring theme)
- gone into great depth with a focused number of investees for an extended period
- continued to get to know and connect with more people

In 1999, 54 Partners answered this question. Key themes were:

- wanting to figure out their own strategy on how to have the most impact in the community.
- consensus around having a deeper, continuing relationship with a focused set of grantees and kids and doing it collaboratively in a very hands-on way
- seeing this community of people and expertise applied in the community and outside SVP as well.
- at the same time there was also a desire to continue learning about and being exposed to the “breadth” of non-profits in Seattle and continually learning from experts, community leaders, etc.

The connection / relationship theme appears for all years, and is most prominent now. Taking a leadership role / serving on a board appears for the first time this year. This is extrapolation at its most tenuous, but it is interesting to note that 1999 feels more about personal learning, 2000 adds family and outcomes to that, and 2005 adds leadership and stronger relationships to the mix. This reflects our philanthropic development model.

Here are some samples of 2005 responses:

*I would be more involved in the organization by serving on more grant committees and working with the investees for a greater amount of time.*

*In some way I would be playing a leadership role.*

*Involved on multiple boards, volunteering within one or more non-profits, doing advocacy work that is affiliated with SVP.*

*Working with a group of people, hopefully SVP partners, in pursuit of a shared objective to benefit a specific philanthropic/charitable cause. I'm still looking for "the cause", and hoping to find like-minded people to pursue it with. I'm trusting SVP is the most likely resource to helping me find both.*

*I would have had time to attend several sessions that helped me develop my giving strategy, comfort as a philanthropist, etc. I would have served on a grant review committee and formed connections with more partners with similar outlooks/interests.*

*Serving as a lead partner. Having more established relationships with non-profits*

*I would be involved in a long-term group volunteer engagement, such as a standing committee, pgc, board, etc.*

*Attending educational sessions sponsored by SVP regularly and volunteering on the board of an SVP grantee.*

*It might make sense for me to mentor other partners or lead partners -- have SVP provide a more organized way for new partners to buddy up with more experienced partners to get advice on philanthropy.*

*I would have an SVP mentor and would be an SVP mentor. My children (who are quite young right now) would have a way to be involved in giving activities with me.*

**Q45: As you think about SVP and where we should go over the next five years, what should be our priorities? What should SVP be doing more or less of than we do today?**

80 Partners answered. In order of most mentioned, key themes were that SVP would:

1. Do more of the same, while refining our strategies and demonstrating our impact
2. Consider more active advocacy and policy work in the issue areas we support, although it is not clear if this means SVP the organization doing so or teaching Partners to do so as individuals. There were also a few suggestions that SVP *not* do this.
3. Diversify and expand the partnership
4. Work harder to connect and develop relationships among partners
5. Consider more issue areas
6. Work to share what we have learned with the partnership and the field

In 2000, 70 Partners answered this question. In order of most mentioned, key themes were:

1. look hard at expanding into other issue areas, but be careful about bigness / slowness
2. indecision about which way or direction to grow
3. making sure SVP empowers its Partners in their individual philanthropy
4. making sure that we continue to learn about, refine and implement our current model

The question was not asked in 1999.

“More and better at the same” appears in both years, although in 2005 it was by far the most mentioned. Advocacy / Policy work appears for the first time in 2005. Knowledge sharing appears for the first time in 2005 as well.

Here is a sampling of 2005 answers:

*Playing a larger role in Seattle's non-profit community -- how to strengthen it, unique ways of collaboration*

*Continuing with the basics: teaching us how to be philanthropists*

*-diversify membership -focus more on evaluating management teams -evolve away from the all-microsoft-all-the-time verbiage and systems*

*Priorities: 1)Continue to improve effectiveness in grant making and partner education 2)Strengthen the partner community 3)Increase our presence in the local community 4)Broaden our appeal to increase diversity of all sorts More of: Explicitly taking on the goal of developing community leaders. When we think of the 'advanced' course, this is one very powerful way of considering the goal.*

*Invest more in staff/outside resources to document knowledge gained and develop methodologies and processes for lead partners, volunteer consultants, and Committee work. Do more to recruit partners with volunteer interests/capacity.*

*Finding a way to expand the advocacy role without getting too far into "politics"*

*I believe we should be drawing in and training mid-career professionals to be philanthropists.*

*SVP should resist the urge to expand its focus or scope. I'd rather see us refine where we are at today, rather than attempt to expand into new thematic areas.*

*Scale up and out! SVP is a great concept I believe can inspire and involve a much, much larger and more diverse subset of the community, in terms of ages, incomes, races, professional backgrounds, etc.*

*Two directions - and they're not issue areas per se: 1 - International - how can SVP Seattle or SVPI create energy around issues that are outside the U.S., rather than just in Puget Sound? 2 - Public policy / advocacy / media / changing public opinion - this really fits with the strategic nature of SVP, but in some ways SVP's focus on non-profits vs. other ways of driving positive social change is myopic and not where most of the dollars to spend are available. Marshalling the public will is much more leveraged.*

*More: Partner-to-partner contact. Really reaching out to other partners (who indicate they would like that outreach) and establishing a buddy/mentor system for volunteering and philanthropy. Model after successful mentor programs where mentors and mentees dedicate some amount of time on a regular (monthly?) basis to a focused meeting (even if over the phone) and then check in as needed*

#### **Q46: In 10 years what is the biggest possible future you can imagine for SVP?**

65 Partners answered. The main themes were 1) expansion and 2) a highly valued SVP brand with demonstrated outcomes and 3) SVP is known for developing leaders. While there was no consensus on how much to expand, many responses hinted that it could not happen without demonstrated outcomes, diversification strategies, and proactive brand development – telling our story. Several respondents also mentioned paying attention to and participating in the SVPI network as part of this effort.

In 2000, 71 Partners answered. The key ideas that emerged were 1) seeing SVP replicated in many other cities, 2) bringing in a greater diversity of Partners, 3) seeing a real impact over X years. There

were a lot of different ideas expressed, but many people said they wanted to do all this, but be careful not to lose the sense of closeness and connection.

In 1999, 48 Partners answered. Three strong themes emerged: 1) the potential for growth and impact of SVP on a national or even International basis, 2) The potential for individuals to begin having far greater impact outside SVP, and 3) the need and desire to see, down the line, a true impact on kids and the community.

The general themes have stayed consistent over time, although in 2005 we seem to have a better idea of how to accomplish these future imaginings.

Here is a sampling of 2005 responses:

*Measurable, positive impact on non-profits in the region. Ongoing willingness to engage in self-assessment as a organization and to move in new directions. Continuous infusion of new philanthropists to energize a stable partner base. Replication of the SVP model both formally through SVPI and informally in other funding agencies.*

*total grants have tripled, partners are leaders in solving regional problems in SVP target areas.*

*That we are known as an inclusive, effective, efficient force in the community to further the ultimate goal of achieving social and economical justice. SVP is also known for developing community leaders among its Partners, Investees and Staff. SVP is a model organization nationally and internationally respected.*

*I'd like to see additional SVP chapters sprout up across the globe and for SVP Seattle to continue to demonstrate leadership in how the franchise should operate*

*SVP is recognized as "the best" entry point for becoming engaged in philanthropy and its partner training is recognized as "best available" for developing "engaged philanthropists". Its community impact through capacity building in its focus areas is significant and well understood in the community--the communities having local SVPs are demonstrably more effective at dealing with the issues in their focus areas than are communities without an SVP affiliate.*

*there are many groups of experienced SVP partners/SVP alumni working together and having meaningful impact on issues important to the community, both locally, nationally, and internationally. In addition, SVP will be leveraging its experience and its massive network/community of partners through an even larger network of relationships and alliances with other organizations such as Foundations, Donor Advised Funds, Volunteer Service Providers, and corporate and governmental funding sources to achieve objectives they have in common with SVP.*

*SVP as a trusted/known source for national politicians to ask for feedback, advice, input to social policy. SVP members serving on presidential commissions etc.*

*a huge and healthy alumni network, and a reputation for being innovative social changers. it would be great to have public awareness increase to the point that svp is as known as, say, greenpeace, or habitat for humanity.*

*That the partnership is larger and more racially and socio-economically diverse. That the SVP partnership is seen as a true community asset -- strong, committed, and informed individuals who engage not only with SVP investees but with the whole range of community/civic/non-profit groups within our community. That with growth SVP can expand its grantmaking into new, and perhaps more leveraged, issue areas.*

*SVP would be the information center for philanthropic giving and collaboratives.*

*SVP overtakes the Rotary Club as the largest worldwide membership group promoting community good, and has 10,000 locations with regular meetings large and small, and the leverage and power of capacity building and sharing of best practices, combined with dramatic use of technology tools to drive its mission forward, makes it a major factor in social progress.*

*To be seen as even more important than the United Way in the local philanthropic scene. Not because it contributed more money, but because it contributed more 'value'.*

*I wonder if SVP becomes like Rotary Club on steroids (in a good way)? In 10 years SVP Seattle will be a recruiting machine, increasing the number of partners to 2,000. Partners will come from diverse backgrounds, but will have core business skills and strong intellects, so still will not mirror the demographics of our community. There will be more formal training programs that permit experienced partners to share their knowledge with new partners.*

## Appendix A

### Definition of Criteria for Strategic Giving

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*

#### Strategic Giving Criteria

**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.

**Collaborative:** 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.

**Systemic/policy impact:** partner includes funding for efforts that address systemic change (e.g. advocacy, organizing activities).

**Long-term:** 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.

## Appendix B

### Definition of Criteria 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.

**Leverage:** partner has recruited new volunteers and/or financial resources on behalf of an organization or community group.

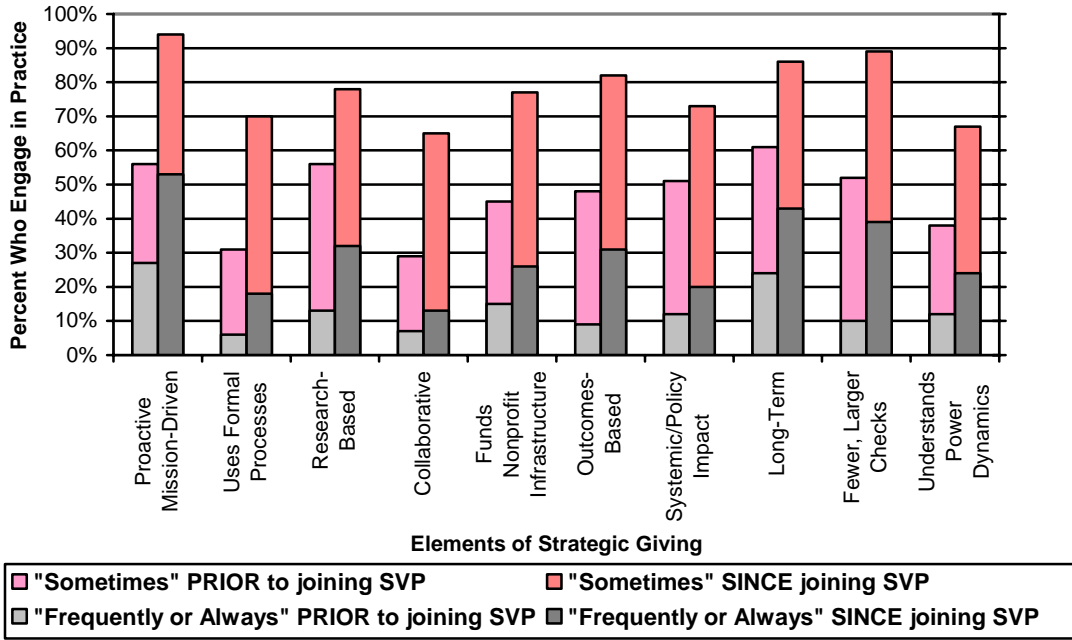
**Public Meetings:** partner has attended and/or spoken at public meetings in which there was a discussion about community affairs.

**Awareness of Community Affairs:** partner knows what is going on and talks about community affairs.

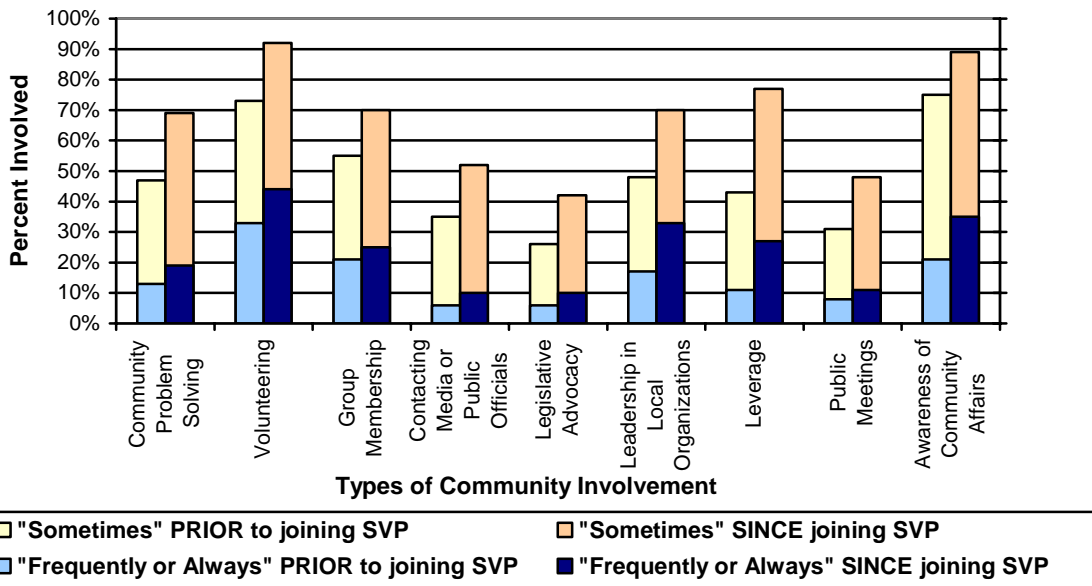
## Appendix C

### Additional Data for Strategic Giving & Community Involvement

#### Changes in Strategic Giving



#### Changes in Community Involvement



## Appendix D

### Pre / Post Survey for Grant Committees

Social Venture Partners

Philanthropy Development Strategy Evaluation

Name:

Date:

These pre and post surveys will help SVP evaluate the effectiveness of our philanthropy development strategies. Individual surveys will be kept confidential. Data will be rolled up and presented anonymously.

Please assess yourself in the following areas.

Circle one response for each area.

	I don't know a lot about about this. I am eager to learn more.			I know quite a bit about this. I consider myself a peer leader.	
	1	2	3	4	5
K-12 education issues in King County	1	2	3	4	5
Key K-12 education players in King County	1	2	3	4	5
Promising approaches to improving K-12 education	1	2	3	4	5
How & where to find information about K-12 education issues	1	2	3	4	5
The challenges faced by nonprofit organizations or schools	1	2	3	4	5
How nonprofits fund their operations	1	2	3	4	5
Organizational capacity building for nonprofits	1	2	3	4	5
Differences between for-profit and nonprofit corporations	1	2	3	4	5
Developing criteria to evaluate grant proposals	1	2	3	4	5
Evaluating a grant proposal	1	2	3	4	5
Evaluating the strength & effectiveness of a nonprofit organization	1	2	3	4	5
Evaluating nonprofit financial statements	1	2	3	4	5
Due diligence in grantmaking	1	2	3	4	5
Making a difference in my community	1	2	3	4	5
People who share my interests and how to contact them	1	2	3	4	5
Advocating for K-12 education issues	1	2	3	4	5
Developing a formal giving plan	1	2	3	4	5
Using my skills and knowledge to consult for a nonprofit	1	2	3	4	5
Sharing my experience & knowledge with other philanthropists	1	2	3	4	5
Personally making a difference on K-12 education issues	1	2	3	4	5

Please tell us what you think about the following. If you are not sure, please check the box.

1. Three of the important issues in K-12 Education in King County are:

- i.
- ii.
- iii.
- I'm not sure at this time.

2. Three key players working on K-12 Education issues in King County are:

- i.
- ii.
- iii.
- I'm not sure at this time.

3. Three promising approaches to improving K-12 education are:

- i.
- ii.
- iii.
- I'm not sure at this time.

4. Three challenges that nonprofits face are:

- i.
- ii.
- iii.
- I'm not sure at this time.

5. Three major funding sources for nonprofits are:

- i.
- ii.
- iii.
- I'm not sure at this time.

6. Three differences between for-profit and nonprofit corporations are:

- i.
- ii.
- iii.
- I'm not sure at this time.

7. Three important areas of organizational capacity building for nonprofits are:

- i.
- ii.
- iii.
- I'm not sure at this time.

8. Three criteria that are important for evaluating a grant proposal are:

- i.
- ii.
- iii.
- I'm not sure at this time.

9. Three criteria for evaluating the strength of a nonprofit organization are:

- i.
- ii.
- iii.
- I'm not sure at this time.

10. Three ways I can make a difference in my community on K-12 education issues are:

- i.
- ii.
- iii.
- I'm not sure at this time.

11. Three places I can find people who share my philanthropic interests are:

i.

ii.

iii.

I'm not sure at this time.

12. I have the following skills to offer nonprofits:

i.

ii.

iii.

I'm not sure at this time.

13. I have the following skills / knowledge to offer other philanthropists:

i.

ii.

iii.

I'm not sure at this time.

14. Three community issues I care about:

i.

ii.

iii.

I'm not sure at this time.

15. Three types of programs I want to support are:

i.

ii.

iii.

I'm not sure at this time.