Discovering your philanthropic identity

Giving approaches, strategies, and philosophies

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Acknowledgment

Fidelity Charitable is excited to offer this important content to help your philanthropic journey.

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Introduction

> "To give away money is an easy matter… But to decide to whom to give it, and how large and when, and for what purpose and how, is neither in every [person]'s power – nor an easy matter. Hence, it is that such excellence is rare, praiseworthy, and noble."
>
> " Aristotle

If you're looking for guidance on how to approach your giving, there is no shortage of resources—a quick web search will offer thousands of resources and dozens of purported best practices. The challenge is making sense of it all—and determining which insights will actually support you.

This primer aims to help with that. Specifically, this primer will help:

- **Clarify your philanthropic identity** with reflections and tools around your passions and priorities
- **Translate your philanthropic identity into effective practices** with an overview of giving philosophies, strategies, and approaches

Your Philanthropic Identity

The essential first step in becoming an effective giver is to consider your identity as a donor. Who are you and what backgrounds, skills, and networks do you bring to your giving? How do they inform (or potentially bias) how you understand social problems and possible solutions?

Identity Dimensions

Start by considering how your unique identity informs your charitable giving. Common identity characteristics are race, gender, and age, but it's also essential to think about many other aspects of your identity: class (both origin, how you grew up, and your current status), wealth (specifically the amount, source, and control), education, faith, ethnic heritage or diaspora membership, professional affiliations, geographic connections (where you live or grew up, where your family is or is from), ability/disability, sexual orientation, and more. These aspects of your identity shape your view of the world, inform your giving journey, offer insights, and sometimes create blind spots.

Power and Privilege

> "The price of privilege is the moral duty to act when one sees another person treated unfairly. And the least that a person in the dominant caste can do is not make the pain any worse."
>
> ❝   Isabel Wilkerson

Connected to your personal identity and giving are the power and privilege you bring into every philanthropic experience. If approached thoughtfully and honestly, legacies of money can help advance systems change if we honestly and thoughtfully wrestle with the role of power dynamics, wealth concentration, and the resulting dynamics of racial inequality and injustice in our society.

Relationships and Context

A third component to consider is your relationships and their role in your giving. How, if at all, will you involve your family and loved ones in your giving— and what are the dynamics (within and across generations) that may shape your giving decisions? How will you engage with friends, peers, field leaders, and experts as you chart your giving journey? How do you hope your giving may strengthen or change your relationships—and how might it damage them? How can you leverage your relationships to amplify your financial gifts (often referred to as leveraging your time, talent, and relationship ties in addition to your treasure)?

Translating Identity, Priorities, and Passions into Practice

Finally, it's important to connect all of yourself to your giving as you translate your passions and interests into a set of giving priorities and practices. As you build your giving plan, we encourage you to balance both what you care about and what the world needs, and to look through the philosophies, strategies, and approaches below to identify the ones that resonate. It's critical to maintain a level of honesty and humility as you craft and iterate your plan and continue to glean insight from those who have spent their lives working on the issues you care about or are directly affected by the challenges you hope to address.

Before diving into the next section, it's important to note here the role of mission, vision, and values, a core part of translating your identity, priorities, and passions into practice. Your *mission*, *vision*, and *values* should broadly articulate and codify the things you care about and the impact you want to make, and either flow into or overlap with your giving philosophy, strategy, or approach. Related to this are *strategy development tools*, most notably theory of change, logic models, and strategic plans. A *theory of change* is a method that explains how an intervention is expected to lead to specific changes and draws heavily on causal analysis and preexisting evidence.[1] A logic model is a detailed visual representation of how an intervention works, making explicit a program's or intervention's goals, inputs, activities, outputs, and outcomes. Most broadly, a strategic plan is the primary output of strategic planning, a process whereby an individual or organization sets priorities, articulates goals, and determines necessary actions and activities on specific timelines.[2]

Philosophies, Strategies, and Approaches

Determining which funding strategy or approach is right for you is an essential aspect of translating your philanthropic identity into an effective giving practice. Unfortunately, like every sector, philanthropy is brimming with terminology and jargon. Those terms overwhelmingly evolve, overlap, and distort over time and are seemingly endless in their variations and, in practice, often used interchangeably. The following section aims to help you cut through that confusion.

Institutional vs. Individual

While many of these ideas cut across strategies used by both institutional and individual givers, this paper is designed with the individual donor in mind. While defining and explaining these terms, we've tried to de-center the institutional orientation of many of the terms and, where appropriate, explain how they might be useful in the context of individual giving.

Making Sense of It All

In support of seeking clarity, we find it helpful to think about these big terms—giving strategies, philosophies, approaches, etc.—as broad "categories" that, while certainly overlapping, have slightly different and nuanced orientations:

- **Giving Philosophies:** values, principles, and core beliefs
- **Giving Approaches/Styles:** standards or patterns of behavior and conduct
- **Giving Strategies:** specific goals, objectives, plans, and outcomes
- **Giving Tactics:** specific vehicles and activities, often within the short-term service of broader goals and objectives
- **Giving Lenses:** a comprehensive way to examine and understand the world or work, with special emphasis on the way things intersect and crosscut
- **Giving Focus:** topical and issue-specific prioritization

To be clear, we are not claiming that these distinctions and characterizations are absolutes. Rather, we think they're useful for making sense of the landscape of resources and more specific terms.

Term Clusters and Definitions

We find it helpful to categorize common and related terms into a broader "cluster." For each cluster, we offer a brief overview to anchor your understanding and a list of associated key terms.

There are eight clusters:

TIMING

SYSTEMS CHANGE

IMPACT INVESTING

COMMUNITY-CENTERED AND SHIFTING POWER

BEYOND MONEY

JUSTICE

SOCIAL INNOVATION AND RISK CAPITAL

RACE AND ETHNICITY

While this list is not exhaustive, we hope it serves as a strong starting point and springboard for generating insights for your own giving.
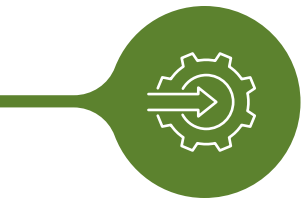
CLUSTER 1

Systems Change

> "For every complex problem there is an answer that is clear, simple, and wrong."
>
> **"**   H. L. Mencken

The terms within this cluster center around systems change and related concepts, such as complexity, addressing root causes, pursuing equitable outcomes, and more.

Systems change philanthropy: aims to shift the systems that give rise to and perpetuate societal challenges, with emphasis on addressing root causes as opposed to addressing symptoms. Systems change philanthropy makes sense of complex issues by thinking in terms of wholes and interconnectedness rather than splitting into parts.[3]

★ *Related terms: collective impact, structural change, movement building, advocacy and policy change, narrative change, transformative philanthropy*

Adaptive philanthropy: emphasizes the importance of having a strategy that is focused but also nimble and flexible enough to respond to unpredictable conditions and emerging opportunities. In practice, this usually involves defining what success would look like in the medium and long term, establishing "philanthropic anchors" (what shouldn't change even as conditions do), having flexible boundaries and practices to enable capitalizing on new or emerging opportunities, having a firm understanding of the evidence and research regarding what works and what doesn't, committing to continual learning and experimentation, and having a formidable risk-tolerance.[4]

Emergent strategy: focuses on the importance of having a strategy that matches the complexity of the problems you aim to solve.[5] Proponents of emergent strategy are critical and skeptical of strategies that assume linear theories of change on predictable timelines since social change is unpredictable, dynamic, and often counterintuitive. They also often invoke the [distinction between simple, complicated, and complex problems](#)[6] and emphasize creating conditions where the whole—not just parts— of a community can participate in generating iterative solutions.[7] While sharing many

characteristics with adaptive philanthropy, emergent strategy differs in its robust use of complexity theory and organizational learning concepts and practices.

Place-based giving: giving approaches that focus on and prioritize specific locations. It's important to note that instances of place-based philanthropy can vary widely and be applied across your entire giving philosophy. For example, in the US in the 1980s and 1990s there was a significant focus on urban philanthropy to address the dynamics of intersecting racial and economic dynamics of white flight and the economic troubles of urban areas.[8] More recently, there has been a growing push for more focus on rural philanthropy, which encapsulates a wide range of social change activities that impact communities with remarkably diverse backgrounds and situations but united in their geographic distance from one another.[9] Given the economic and social factors that shape rural communities—and contribute to rural poverty, which often looks very different from urban poverty[10]—there are opportunities to achieve transformational impact with fewer dollars.[11] Another framing for place-based giving is giving internationally, whether focused on issue-based work that is truly global or country- or region-specific funding. For giving outside the US, extra care is needed for identifying and navigating cultural differences and power dynamics.[12]

CLUSTER 2

Community-Centered and Shifting Power

> "The lesson is that thriving is not actually about the leader, it's about the whole flock. Everyone has the potential to lead, and leadership is about listening and being attuned to everyone else. It's about flexibility. It's about humility. It's about trust... It is more about holding space for others' brilliance than being the sole source of answers, more about flexible shape-shifting to meet the oncoming challenges than holding fast to a five-year strategic plan."
>
> " Edgar Villanueva, author of *Decolonizing Wealth*

The terms within this cluster are characterized by the extent that they center the stakeholders closest to issues and address the power dynamics inherent in social change contexts.

Trust-based philanthropy: aims to address the inherent power imbalances in social change contexts—both in explicitly naming the imbalances and striving to redistribute power. In practice, this usually involves streamlining application and reporting processes, making multi-year and unrestricted giving commitments, and engaging in relationships based on trust and transparency.[13] It's worth noting that this term has received much attention recently, largely in part due to the Trust-based Philanthropy Project, the originators of the term, who have made clear that the term is largely a re-packaging of past best practices.[14]

Participatory grantmaking: a practice in which decision-making power is formally ceded to or shared with the individuals and/or communities closest to and impacted by certain issues and problems. This practice is often described as "democratizing philanthropy" and embodied by "nothing about us without us."[15]

Community-led philanthropy: champions the view that people within the communities most proximate to problems are best positioned to lead efforts to solve them given their local knowledge, relationships, and assets. There is much evidence that community-led initiatives are especially effective, agile, and adaptive.[16]

★ *Related terms: responsive philanthropy, community-driven, community-centered, constituent-led, issue-proximate.*

Money as medicine: one approach and philosophy that centers a Native/indigenous traditional conception of medicine, which emphasizes balance and restoration, to reframe the purpose of money—specifically, that money should be a tool to promote love, facilitate relationships, and cultivate flourishing communities for all, rather than something that is hoarded, controlled, and used to divide.[17]

CLUSTER 3

Justice

> "You have to act as if it were possible to radically transform the world. And you have to do it all the time."
>
> **"** Angela Davis

The terms within this cluster are characterized by their focus on justice, often with a particular focus or prioritization.

Social justice philanthropy: focuses on systemic change and addressing the root causes of social, racial, economic, and environmental injustices. In addition, it focuses on centering the people who are most impacted by the issues they face.

★ *Related terms: systems change philanthropy, racial equity, racial justice, community-led, trust-based philanthropy.*

Movement building: the process of organizing and coordinating to activate the will and capacity of people, organizations, and/or communities to work toward a shared social or political vision or goal.[18] Movement building, like narrative change or policy and advocacy work (defined below), can be a powerful lever in shifting systems and advancing equity.

Racial justice: building on the concept of employing a racial equity lens, giving with a racial justice lens adds additional elements, including understanding and acknowledging racial history, creating a shared vision for a fair and inclusive society, emphasizing solutions that involve and shift multiple systems, and, focusing explicitly on shifting and building civic, cultural, and political power for those most proximate to issues.[19]

Environmental justice: overlaps with social justice and racial justice, but with a particular focus on environmental issues and systems. Specifically, it attempts to address how people of color and other historically under-resourced groups are disproportionately impacted by the effects of environmental degradation, climate change, and failing physical and social infrastructure due to systemic disinvestment and structural racism.[20]

Economic justice: overlaps with social justice and racial justice, but with a particular focus on economic issues and systems. Specifically, it considers and attempts to address how implicit bias and structural racism has led to disproportionately impacting people of color and other historically excluded groups, including outcomes related to wealth building, housing, health care, and philanthropic investments, among others.[21] Economic justice is connected to the idea of just economies, an aspirational state of society where we would transition from our current, exclusionary economic systems to sustainable and regenerative economic systems.[22]

Intersectionality: the ways in which systems of inequality or oppression surrounding gender, race, ethnicity, sexual orientation, gender identity, disability, class, etc. intersect, reinforce, and compound to create different manifestations of inequity, discrimination, and disadvantage.[23, 24]

Disability justice: an intersectional frame that values access, self-determination, and an "expectation of difference." To live into an "expectation of difference" is to expect differences among all people in terms of disability, identity, and culture.[25]

What's in a name?

The language we use is important and impactful and changes over time. As you navigate conversations, especially with historically marginalized communities, it is critical to honor the various perspectives, histories, and views of the people you work with. Committing to ongoing learning and awareness is vital and we hope the principles below can help your engagement with some of the terms you will see in practice.

Inclusive language principles[26]

- Use person-first language

- Frame issues with an agency lens, rather than depicting people as helpless

- Don't use adjectives as nouns

- Acknowledge historical realities and avoid euphemisms

- Only note race, ethnicity, social class, or disability status when necessary and relevant

- When race, ethnicity, social class, or disability status descriptors are relevant, be as specific as possible to avoid inaccuracies or generalizations

Below is a list of some commonly used out-of-favor terms and recommended replacements. We recommend that you go deeper on this subject by exploring this underlined inclusive language resource, which expands on these guiding principles and provides a comprehensive list of out-of-favor terms and currently used terms.[27]

Out-of-favor terms	Currently used terms
Third/developing-world	Global south
Diverse person, nonwhites, racial minority, minority community	People of color, Black, indigenous, and people of color (BIPOC), person(s) of color
Indigent, homeless person	Person experiencing poverty, person experiencing homelessness, people without housing, person who is unhoused
Disabled person, differently abled, wheelchair bound	Person with a disability, person who uses a wheelchair

CLUSTER 4

Race, Ethnicity, and Identity

> "Racial caste systems do not require racial hostility or overt bigotry to thrive. They need only racial indifference, as Martin Luther King Jr. warned more than forty-five years ago."
>
> **❝** Michelle Alexander

The terms within this cluster are characterized by the extent that they center race, ethnicity, and identity.

Diversity, equity, and inclusion (DEI): are related, but distinct concepts.[28]

- **Diversity** is the presence of difference in a group, specifically considering elements of human differences including race, ethnicity, gender, sexuality, ability, socioeconomic status, spiritual beliefs, and worldviews. Importantly, we think of these elements of difference in a way that focuses on and centers populations that have historically been and remain underrepresented, excluded, and marginalized in society.

- **Equity** is broadly understood as fairness and justice for a given person or group. More technically, it can be understood as the absence of disparities in outcomes (socioeconomic, health, educational, etc.) and other indicators of well-being and quality of life at a community level— and in the opportunity to accomplish goals at an individual level based on elements of human difference.

- **Inclusion** is the degree to which all individuals can participate fully and are welcomed and supported in their participation.

★ *Related terms: justice, equity, diversity, and inclusion (JEDI); antiracism*

Antiracism: a state of action and reflection that deliberately brings DEI and related principles into concert, while also deeply reflecting on the historical context in which one sits—and being intentional about facing the unjust ways in which racism and colonialism have permeated virtually all societies.[29]

Racialized outcomes: the distribution of society's benefits and burdens are predictably skewed by race, which is driven by systemic and structural inequities. For example, members of communities of color are more likely to experience poor health outcomes like diabetes, heart disease, depression, and other potentially fatal diseases.[30] Socioeconomically, members of BIPOC communities are more likely to live in poverty, be imprisoned, drop out of high school, and be unemployed.[31]

Racial equity: an approach that involves analyzing data and information about race, understanding disparities and the reasons they exist, accounting for and attempting to address the root causes of systemic and structural problems, and naming race explicitly when talking about problems and solutions.[32] Achieving racial equity is often characterized as a society where race is no longer predictive or determinate of health, socioeconomic, and other outcomes.[33]

Sexual orientation and gender identity (SOGI) lenses: approaches that aim to identify and anticipate differences across sexual orientation and gender identity and how they connect to systemic discrimination and inequities.[34]

★ *Related terms: feminist lens, gender lens, LGBTQIA*

CLUSTER 5

Social Innovation and Risk Capital

> "Philanthropy is funny. We love the word innovation but then we're super scared of failure."
>
> " Amoretta Morris

The terms within this cluster are characterized by the emphasis on social innovation and/or risk capital in giving and social change contexts.

Social innovation: the process of discovering, inventing, developing, implementing, and/or scaling a novel solution to a social problem that is more effective, sustainable, or just than existing solutions.[35]

Philanthropy as society's risk capital: a philosophy that philanthropy's role in society should be providing the capital to enable social innovation—to take risks and make big bets to promote experimentation and discovery in ways that business and governments can't or won't.[36]

Catalytic philanthropy: a philosophy and approach that challenges conventional philanthropy and emphasizes employing a variety of practices beyond giving, including leveraging voice, social capital, convening, and capacity building, that lead to social innovation or transformative change.[37, 38]

Collective giving: a practice in which a group of people combine their resources into one gift or ongoing pooled fund.[39]

★ *Related terms: giving circles, pooled funds, collaborative giving*

Venture philanthropy: a giving approach that draws on practices from venture capital investing, typically characterized by "betting big" on a particular organization or initiative, conducting extensive due diligence, committing long-term, funding start-up costs and capacity building, and relying heavily on the use of metrics and key performance indicators.[40]

★ *Related terms: seed funding*

CLUSTER 6

Beyond Money

> "It's not just about giving away money, it's about community connection, local partnerships, deeper understanding of your own mission or your institutions—there is so much to gain from beginning or growing your giving circle."
>
> **"**   Sara Lomelin

The terms within this cluster are characterized capabilities, functions, and activities peripheral to or outside of charitable giving.

Convening: leveraging community position and resources to bring people together to create connections, ideate, increase buy-in, and facilitate learning that creates impact beyond giving. Depending on your context and goals— and especially as community-led and trust-based approaches continue to proliferate—investing in and leveraging your convening capabilities can be a powerful way to create impact and amplify your giving.

Policy change and advocacy: the practice of engaging in policy change and advocacy activities as levers to addressing systemic and structural inequities.

Communications and narrative change: the ability to employ communications and narrative change practices to shape culture and shift systems. Narrative change makes use of storytelling, a deeply human and highly effective practice for communicating about sprawling, complex issues.[41]

Collaboration: the practice of participating in and managing collaborative activities and efforts toward a common goal.

CLUSTER 7

Impact Investing

> "Without access to financial and nonfinancial resources, Black and Brown movement leaders and social entrepreneurs face substantial roadblocks that prevent them from realizing their vision and expanding their work. What's needed is a massive focus on unlocking capital for their critical work to grow and scale."
>
> **"**   Nwamaka Agbo and Lem White[42]

The terms within this cluster are characterized by the extent that they employ or integrate practices and methods from the investment world.

Impact investing: investments made into companies, organizations, and funds that aim to generate a beneficial social or environmental impact alongside a financial return.[43] Impact investing is the umbrella term under which more specific types of impact investing fall (see below).

⭐ *Related terms: alternative investing, social investing*

Environmental, social, and governance (ESG) investments: are investments that intentionally include assets with positive social and environmental impacts.

Socially responsible investments (SRI): are investments that exclude assets with negative social and environmental impacts.

⭐ *Related terms: negative screening*

Recoverable grants: a grant with agreement stipulations that all of the grant will be repaid given certain events or outcomes.[44] For more on this, see Fidelity Charitable's primer on recoverable grants.

Mission-related investing (MRI): the investment of an entity's assets in a way that aligns with and furthers its overall mission and purpose.[45]

Program-related investing (PRI): the investment of a charitable entity's assets in a way that furthers a specific program or charitable goal, with the intent of a financial return. PRIs differ from MRIs insofar as they relate to specific programs and elements and, under certain conditions in the U.S., count as part of a foundation's payout requirement.[46]
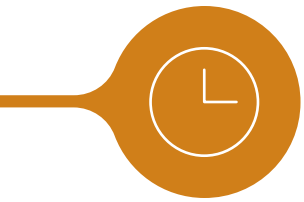
CLUSTER 8

Timing

> "We know we can have a greater impact by using all our money for catalytic change now instead of doling out modest grants indefinitely."
>
> ❝ June Wilson

The terms within this cluster are characterized by the extent that they center around timing (legal, financial, etc.).

Perpetuity: foundations established with the intent to last for an indefinite period. Many private foundations operate with an endowment model, adhering to United States laws that require foundations to pay out at least 5% of their assets annually, thus leaving the corpus of the foundation intact in perpetuity.

★ *Related terms: endowment giving*

Spend-down: a strategy and commitment to give away all resources within a specific time frame.

★ *Related terms: time-limited, sunsetting*

Planned giving: a general term for various methods of giving related to financial or estate planning whereby some or all of a gift is deferred to a later date, often after a donor passes.[47]

Rapid-response: approaches, practices, and processes that enable deploying resources quickly and effectively to address urgent needs in a crisis. In practice, this typically involves streamlining applications and letters of intent, lessening or removing reporting requirements, and increasing overall flexibility, employing concepts of trust-based and emergent philanthropy.[48]

Beyond Clusters: Broad questions on giving strategy and management

Beyond the eight clusters above, there are some broader questions and issues of giving strategy and management that are worth noting.

First, some terms have become so ubiquitous that they seem ambiguous at best, but more often are just plain confusing and controversial. *Strategic philanthropy* particularly fits this bill; once exciting and promising, it has now become contentious, evoking associations with linear and rigid models of change, being top-down and donor-centered, and overly reliant on ineffective, business-based analogies and practices. While dodging the negative connotations surrounding strategic philanthropy, *effective philanthropy* is a term so generic and commonplace that, while having many robust operationalizations and frameworks, it resists a general definition that adds value.

Unlike strategic philanthropy and effective philanthropy, *effective* altruism, the giving philosophy and movement which aims to use reason and evidence to find the best ways to make an impact,[49] has clearly defined underlying beliefs, principles, and recommended practices. Effective altruism is characterized by "finding unusually good ways of doing good," often amounting to funding interventions with an impact for the same or fewer resources.[50] However, it has been criticized for favoring defined-benefit interventions (vs. systemic change efforts), which can succeed with widespread impact but can also fail and yield little to no result.

Lastly, *faith-based giving* frames myriad giving approaches and practices and can vary widely based on culture and tradition; the through line for most is that a faith-based approach is very much an approach or lens the way we defined it above—it frames, informs, and permeates in a comprehensive way to examine and understand the world or work, with special emphasis on the way things intersect and crosscut.

So, given all that, why are we even mentioning these? First, while these terms are tricky, we think they're important to note given their widespread use. Second, we're not saying you shouldn't use these terms, but strongly recommend ensuring you are especially clear and thoughtful about how, where, and when you are using them—in support of both translating your philanthropic identity into an effective giving practice and avoiding any unintentional missteps. They can be placeholders for a wide range of ideas and intentions, and it is important to not let these popular but ambiguous terms create unintended confusion as you develop your giving strategy.

Additionally, as you think about how to put your giving into practice, you will often face questions about *how to structure* your giving and evolve it over time with particular legal vehicle(s). In the U.S., the most common form of giving is ongoing gifts from your checking account or donating stocks or other personal assets. However, many donors find that establishing a donor-advised fund (DAF) or a private foundation (a legal term that covers commonly used terms like family foundation or independent foundation) provide greater benefits. Public charities sponsor donor-advised fund programs, or *donor-advised funds (DAFs)*, which are often housed at community foundations or grantmaking public charities, who invest the money and manage the process of making grants per a donor's recommendations.[51] Because of where they are housed, DAFs are not subject to the same legal rules as private foundations, most notably private foundations' five percent payout requirement (though generally the major, national DAFs have implemented payout requirements). The Fidelity Charitable Giving Account® is an example of a DAF sponsor. For more information about each of these vehicles, see the Private Foundation and DAF guide by Fidelity Charitable®

Beyond the legal vehicles, it's also important to think about *how to organize your gifts*. Unless you are choosing to support just one or a couple individual charities, you will likely want to develop a *portfolio approach* to giving, which draws on the language and practices of portfolio theory and management in finance, the practice of choosing charitable investments based on the aggregate risk and reward of an entire group of investments rather than any single investment.[52] In practice, this typically involves diligent tracking and categorization of one's giving and pre-assigning a percentage of one's total resources to allocate for each category (usually three to four categories or issue areas).

Finally, over time you will want to continue to evolve your giving and look to best practices in *evaluation and learning* to amplify both impact and personal fulfillment in your giving. The role of measurement, evaluation, and learning in philanthropy stems from both social science and business practices and varies in its use depending on the context. Following are some key terms and definitions that are key for integrating equity into an effective evaluation and learning practice.

Equitable evaluation

Equitable evaluation: an evaluation approach that reimagines evaluation as a tool to advance equity. It does this by considering all aspects of evaluation (e.g., questions asked, methods employed, team composition, etc.) and ensuring that the approach is both culturally competent and multiculturally valid, oriented toward participant ownership, and aimed at revealing and accounting for structural and systemic drivers of inequity.[53]

Monitoring and reporting

Monitoring and reporting: the routine and ongoing collection and analysis of information, usually pertaining to a specific project, program, or initiative. Monitoring and reporting is related to but differs from evaluation in various ways, most notably that it is ongoing (vs. periodic), focuses on inputs, activities, and outputs (vs. outcomes, impacts, and overall goals), and oriented toward project management (vs. learning).[54]

Metric-driven

Metric-driven: an approach to giving that emphasizes the role of measurement in determining success and promoting accountability, often with a penchant for language and practices related to measurement in business and market-based contexts (e.g., key-performance indicators, or KPIs). It's important to note here that not all social change efforts benefit from traditional metric-driven approaches and, often, end up hindering grantees.

★ *Related terms: monitoring and reporting, metric-based, evidence-based philanthropy, evaluation and learning*

Looking Forward

We hope this primer will help you identify questions for reflection about how your personal identity can or does inform your philanthropic strategy and decision making, and also some of the effective practices you want to explore in greater depth as you move forward.

There is no single "right" way to engage as a donor—but bringing greater attention and focus is key to becoming an effective giver. To that end, we invite you to think about the top two or three questions that emerged for you as you read through this primer. For example:

- What area of your personal identity do you want to more deeply integrate into your philanthropy?

- Which cluster of terms connect most directly with your current philanthropic priorities and how might you refine your strategy or how you talk about your giving by thinking more deeply about the key terms that connect to this area?

- Which cluster of terms have you spent the least time reflecting on in the past? How might greater reflection on those terms impact your giving priorities or approach?

Fidelity Charitable is excited to support your continued philanthropic journey. For any further assistance, visit us at <u>fidelitycharitable.org.</u>

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