

1st Annual Report on America's Giving Style

Prepared by
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Report from

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Executive Summary

America's Giving Style is a breakthrough new report that goes beyond the already available statistics on giving to reveal the heart and soul of what donors are trying to accomplish with their gifts. Its focus is on understanding individuals' underlying belief systems and motivators of *how* to effect change, regardless of the issue being addressed.

A collaborative study from Bolder Giving and WiserGiving, America's Giving Style analyzes the strategies and approaches that donors use to solve complex problems through their charitable giving. Most donors are focused on fixing immediate problems but typically will use a combination of strategies to effect long term, sustainable change. Furthermore, most sophisticated donors try to align their giving with their beliefs, though for many their current giving habits do not match their ideals and ambitions.

The data comes from actual donors who have discovered their real preferences for strategic giving by taking the [WiserGiving Style Quiz](#). The Style Quiz presents different ways individuals can impact seven social issues. Based on their specific answers, individuals learn about their intuitive approach to addressing problems -- i.e. their WiserGiving Style.™ Almost a thousand people have taken the Style Quiz online, this report shows their aggregated results.

Highlights and Implications from the Report:

1. Less than 25% of donors focus on only one strategy for impacting change. Seventy eight percent of people have a dominant style and one or two secondary styles, thereby reflecting their belief that several approaches are often needed to address complex problems.
2. The most common strategies are Direct Services, which focuses on the individual as the agent of social change, and Increasing Effectiveness, which emphasizes strengthening organizations and developing leaders who work for the social good as a powerful way to accelerate and sustain positive change.
3. Over a third of respondents stated that their giving was not well aligned with their Giving Style. Being aware of this gap in alignment provides a strategic check point for individuals: don't just give out of habit, but take the time to be thoughtful in how you give.

Individuals' giving has the potential to change organizations and communities beyond the capacity to provide needed human services. If donors align their ideals with their giving, they will not only invest in direct human services but likely will also increase giving to help organizations increase their long-term impact through improved efficiencies, leadership development and scale.

Furthermore, Individuals can increase their satisfaction and their confidence that their giving is having the greatest impact by learning about their Giving Style and adjusting to match their core beliefs about what really works. While no one Style is better than another, it is the alignment of one's charitable giving to their Style that is important. When giving does not match a donor's deepest belief about what creates meaningful change, then over time "donor fatigue" often occurs; they lose interest and feel that their giving is not having the greatest impact. The more aligned one's giving is with their Style, the greater the satisfaction and confidence that their charitable giving is having the greatest impact.

Understanding the Six Giving Styles

Wiser Giving's founders saw their Silicon Valley colleagues struggling to effectively jump-start their philanthropy. With support from the Ford and Hewlett Foundations, they brought together a team of philanthropic and nonprofit experts to develop a suite of interactive online tools that make it fast and easy for donors to become more strategic and impactful. One of the first tools in this suite is the Style Quiz – a set of simple questions inviting donors to think about how they would address seven different issues from the environment to education to health care.

There is no right response to the quiz, rather the answers align with six Giving Styles, overarching approaches to effect change. While much has been written about how much to give, what groups to give to, how to make your gifts and more, the Style Quiz offers a different insight, it helps people discover if the groups they are giving to align with how they think change can best be carried out in the world. Before delving into the aggregated quiz results, it is first critical to understand the six Giving Styles themselves:



Building Movements efforts inspire and support people to take action, together, to achieve deep and lasting social, cultural or political change. Activities often include grassroots organizing, public education, media campaigns, and social action. Examples include: Occupy Wall Street, an anti-bullying campaign, or the Tea Party.



Direct Service initiatives deliver direct assistance to individuals, one person at a time. Sometimes services are aimed at emergency relief needs (e.g. natural disasters such as Hurricane Katrina) and other times at more chronic problems (e.g. alleviating hunger). Direct Services help individuals get what they need to survive, and then to acquire a sense of personal well-being and empowerment. In turn, these individuals can influence and change the lives of others around them.



Making Change Stick champions support of organizations that are the watch-dogs and protectors of social change issues. These organizations monitor policies and practices in order to defend and protect human, social and civil rights where there is enduring opposition or controversy. People with this problem-solving style tend to be deeply concerned about specific issues or may have strong ideological points of view. Examples of Making Change Stick organizations include AARP, NAACP, National Council of La Raza, Sierra Club and NARAL. These organizations generally monitor legislation, court rulings, and public policy in order to ensure that their issues and positions of interest continue to be protected.



Increasing Effectiveness strategies strengthen organizations and develop leaders who work for the social good as a powerful way to accelerate and sustain positive change. Increasing Effectiveness efforts aim to increase an organization's long term sustainability and impact by sharpening strategic planning capabilities, improving efficiency, building capacity, and/or scaling services. Examples include leadership development programs, developing best practices, implementing technology improvements, strategic planning, and scaling-up to expand or open new service outlets.



Public Policy is a strategic approach that creates broad-scale assistance or change by creating, amending, or repealing laws to reflect desired governing principles and funding priorities. Public Policy aims to change how things are done systemically for entire classes of people. Examples include passing state laws to permit same-sex marriage, mandating safety seats for children age 8 and younger, and health care reform. Some examples of organizations that make public policy a centerpiece of their work include Human Rights Campaign or Mothers Against Drunk Driving.



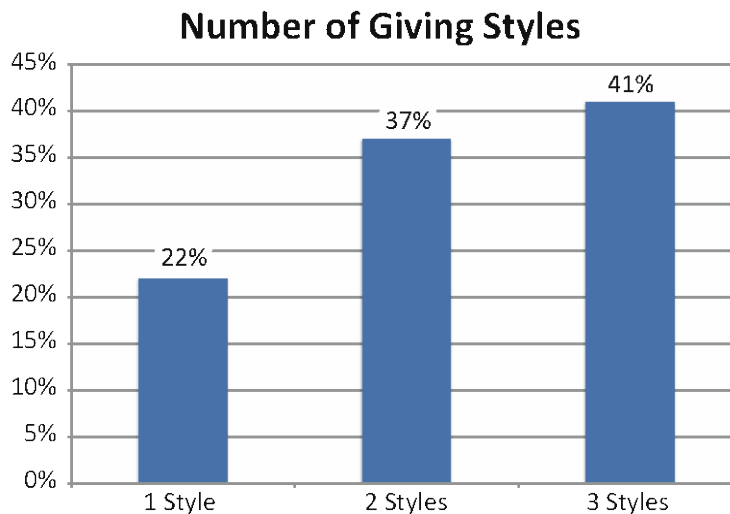
Research and Big Ideas refers to creating different ways of thinking about problems and developing new and effective solutions by investing in research and development. It often includes furthering the knowledge base around an issue, in order to reframe or give new meaning to the issue. By viewing the issues differently, better strategies can often be developed. An example is reframing the poor state of education as a national security issue, where the need to build intellectual capital is viewed as a key driver of economic prosperity and foreign independence, which in turn safeguard our national security.

A Brief Note on Methodology

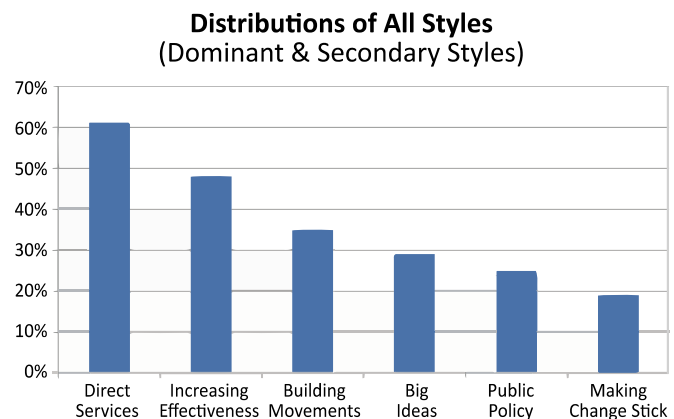
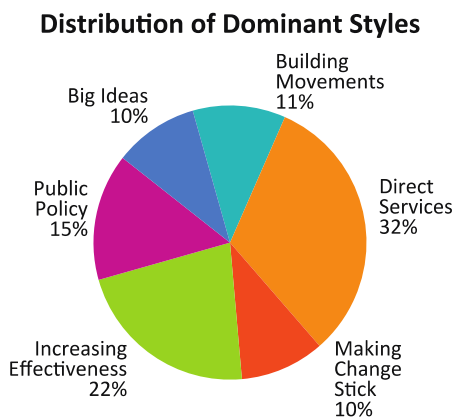
The WiserGiving Style Quiz was launched in the summer of 2012 and has been running in beta for the last two years. This report represents a first analysis of the data collected during this beta period. Data in this report represents the results of the 1,459 people who took this quiz during the beta period, from July 1, 2012 through November 5, 2014. After duplicate results and incomplete responses were deleted, a final sample of 727 quiz results forms the basis for this analysis.

What is America's Giving Style?

As diverse as our country is, it should come as no surprise that almost 80% of all respondents have multiple Giving Styles, indicating our collective belief in a multi-faceted approach to solving problems and creating long-term change. However, no donor gives in isolation. Even if they focus on one dominant approach, they can take comfort in knowing that others are funding different strategies to address challenging issues. We do not hold one giving style to be the “best,” but rather acknowledge that many Styles and approaches are needed to solve complex problems.



Direct Services is the most common giving style, with almost a third of all respondents having that as their dominant style. When secondary styles are included, that number doubles – with 62% of all respondents having Direct Services as part of their overall strategy for impacting change. Next most common style was Increasing Effectiveness (22% of respondents had as dominant style, and 48% had it as dominant or secondary style). Public Policy was the third most common dominant style, though ranked fifth overall in combining dominant & secondary styles.



What Does It Mean to Have a Direct Services Style?

Direct Service initiatives deliver direct assistance to *individuals, one person at a time*. Sometimes services are aimed at emergency relief needs (e.g. natural disasters such as Hurricane Katrina) and other times at more chronic problems (e.g. alleviating hunger). Direct Services help individuals get what they need to survive, and then to acquire a sense of personal well-being and empowerment. In turn, these individuals can then influence and change the lives of others around them.

Direct Service champions are drawn to organizations that work with people and populations at risk. They believe that private giving is an essential supplement to public support systems in order to address urgent issues of survival. They are comfortable supporting emergency interventions that provide immediate relief. Direct Service investors are more likely short-term, results-oriented investors, giving support to different organizations at different moments depending on what the most urgent need is at any given time. They have a sense of urgency and seek immediate relief.

Since Direct Service investors want to see immediate impact, when evaluating organizations they will want to look at efficiency and delivery indicators. High-performing Direct Services organizations often have well-developed data tracking systems and can provide good information on the demographics of the populations it serves. Also look for client stories that demonstrate the value of the services delivered. Finally, since they also want to have the direct service be a catalyst to bring about transformative change for the recipients, effective organizations will have partnerships with organizations working on the policy angle of the issue being addressed, as well collaborations with other direct service organizations serving the same population. This leverages resources to have more far-reaching benefits for the individual.

Community foundations, women's foundations, and local United Ways are typically good resources to help find the most effective local organizations providing direct services in local area.

What are Americans' Most Common Style Combinations?

While there were over a hundred combinations of styles (dominant plus one or two secondary styles), a handful of styles clearly rose to the top as the most common combinations across America. The four most common Style Quiz results were:



Direct Services only: These initiatives deliver direct assistance to *individuals, one person at a time*. Direct Services help individuals get what they need to survive, and then to acquire a sense of personal well-being and empowerment. In turn, these individuals can influence and change the lives of others around them.



Increasing Effectiveness – Building Movements - Direct Services: These are multi-faceted but complementary strategies, which aim to give short-term relief to individuals while investing in the long term by improving the organizational capacity of nonprofits and building critical mass to the point that a significant number of people are deeply committed to an issue(s) and mobilize for change.



Direct Services – Increasing Effectiveness: These are very interrelated strategies, where people often invest in the organizations that are providing the direct services to individuals in need. This increases number of people served by improving the strategic planning capabilities, operating efficiencies, building capacity, and/or scaling services

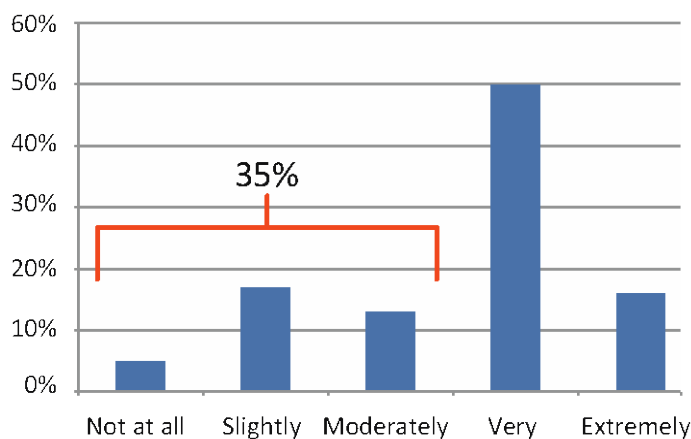


Direct Services – Research and Big Ideas: These are very diverse approaches, but the combination can be notably powerful when applied to a given issue. Research and Big Ideas can yield insights that improve ways of providing Direct Services, and vice-versa.

Do Americans Actually Follow Their Giving Style(s)?

Almost a third of Americans report that their giving does not actually align with their Giving Style, indicating a possible mismatch between beliefs and practice. There are many valid reasons why people give their time and money to initiatives that aren't the same as their WiserGiving Style™. Often times there are urgent needs that require an immediate response. Sometimes key issues or communities that we deeply believe in need assistance in ways different than our Style. And there are times when our allegiance to people or organizations causes us to respond to their requests even if they are not consistent with our own Style. This is all fine — as long as we are making a conscious choice about it. Future reports on America's Giving Style will explore this alignment or lack of alignment in more depth.

How well is your charitable giving aligned to your Giving Style?

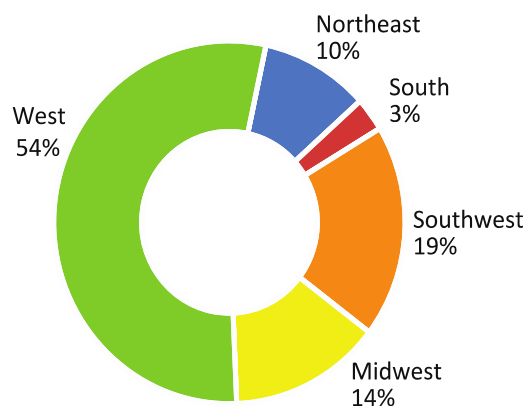


Interesting Hints

With only a limited amount of demographic data for the first set of quiz-takers, it is too early to say definitively what the differences are by geography among donors. Currently, the audience is heavily weighted in the US (87%), and within the US, from the West Coast, most notable from the Bay Area and Seattle areas.

As we continue to broaden our reach, look for America's Giving Style 2015 Report, which will delve more deeply into how different communities approach their giving.

Distribution of Quiz Takers



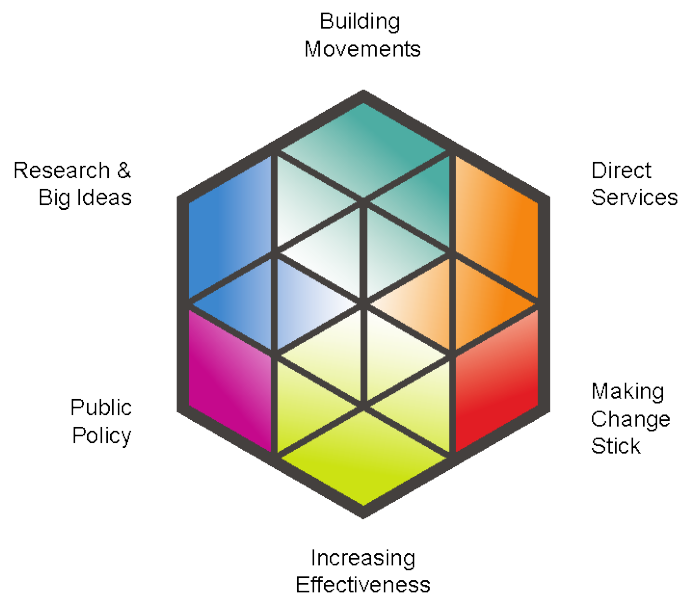
Conclusions

America's Giving Style evolves the discussion from describing *what* subsectors receive funding to *how* donors are inspired to give.

Many donors focus on which organizations to give to without understanding their own personal paradigm for change. As a result, even if they give to an effective organization, they often won't feel satisfied in their giving if the organizations' efforts don't reflect their personal Giving Style, and over time they tend to lose interest.

The objective of the Style Quiz is self-awareness: to discover one's motivations and beliefs about the best ways to effect change. Armed by this self-knowledge, individuals can align their giving to how they believe change is created in the world. Ultimately the more aligned ones' giving is, the more confidence they have that their giving is being impactful – regardless of the issue or organizations they fund – and the greater their satisfaction over the long term.

Self-knowledge is the key to becoming a strategic giver and fulfilling philanthropy journey.



Presented By

Bolder Giving, a non-profit organization that encourages people to build bold giving into their lives and then shares the stories of these generous givers to inspire others.

WiserGiving makes smart philanthropy simple by providing free interactive tools, resources, and expert advice to help individuals increase their charitable impact and achieve their philanthropy goals.

Report Authors



Jason Franklin, PhD serves as Executive Director of Bolder Giving (fiscal sponsor for WiserGiving) and as an award-winning Adjunct Professor at NYU's Wagner School of Public Service. He brings to the WiserGiving team a background in philanthropy education, nonprofit strategy & leadership, and urban policy & education advocacy. He is a regular commentator in the media about philanthropy and serves on a range of boards including the North Star Fund, Proteus Fund, 21st Century School Fund, & Solidaire Donor Network.



Karen Crow is co-founder of WiserGiving and a 15-year internet veteran. She spent seven years at Google where she ran the West Coast Sales and Operations. She was a recipient of the Google Founders' Award, recognizing leaders who make an extraordinary contribution to the company. Prior to Google, she was a partner at an international strategy consulting firm and was co-founder of EXG Technologies.



Liz Bremner has spent her career in the philanthropic sector and is co-founder of WiserGiving. For 25 years she's provided leadership for new and emerging organizations including The Foundation Incubator, the Santa Fe Community Foundation, and the Los Angeles Women's Foundation. Liz contributes her experience in management, finance, fundraising, and strategic planning to numerous nonprofits and serves on the boards of Ms. Foundation for Women and ZeroDivide.



Stephanie Clohesy is founder and principal of Clohesy Consulting, an organizational development firm offering planning, research, and design services to philanthropic foundations and nonprofit institutions. Her 30 years of national and international experience include public policy reform, women's and human rights, civic participation and democratization, and organizational and leadership development. Stephanie helped create *Making the Case* for the Women's Funding Network, which inspired the WiserGiving Style Quiz.

This publication is available online at www.wisergiving.org. For hard copies of this publication, please contact Bolder Giving at 646-678-4394 or email info@boldergiving.org.

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