

Toward a Real Simple Taxonomy: Bridging Learners and Content to Create New Value @ LearnPhilanthropy (draft v_1/12/2012)

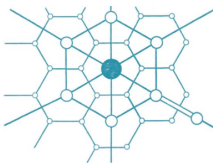
By Dara Major

Overview

Is there a difference between good and great philanthropy? We believe the answer is: yes. And we believe learning is what enables individuals to adjust their thinking and improve over time. As a field, we believe it is possible to identify what is most critical to learn and do in order to achieve the results we seek. Which just may mean the difference between good and great.

LearnPhilanthropy is a network of grantmakers and philanthropy support practitioners who are building a fieldwide hub for grantmaker learning.

LearnPhilanthropy was launched on the widely-held premise that there is an existing learning marketplace for grantmakers (which includes regional associations, affinity groups, universities, advisory firms, and others) – but this marketplace is somewhat fragmented. Recent research finds that many individual learners are spending an inordinate amount of time trying to find what they need, and many providers are struggling to develop learning resources that are responsive to the needs of the field as well as to extend their reach.



At LearnPhilanthropy, we don't want to duplicate what others are doing – we want to shine a spotlight on it! We'd like to bring the highly committed and growing community of learners and learning providers together to enhance learning and impact (recognizing that learners are also often themselves learning providers). We think there are some important network effects that can flow from this, including: improving access to high-quality learning resources; identifying some gaps in the landscape of existing resources; stimulating investment in underserved areas; and increasing the value of the learning resources themselves by getting them more widely used.

We are currently building a prototype to connect grantmakers, donors, and trustees to:

- A searchable catalogue of the sector's high quality resources, tools, and information on ongoing learning opportunities;
- Frameworks, pathways, and special collections to help foundation staff, board members, and donors develop their own learning agendas;
- Peer learning opportunities and advice from experts;
- An ongoing conversation on how learning supports effectiveness, through blogs and other channels.

LearnPhilanthropy plans to implement universal search across all of these content types, and over the next several months will develop a critical mass of resources, data, user-contributed comments and other input.

A real priority for us is to help users to navigate these resources to find what they need. To help users, LearnPhilanthropy is creating a “Real Simple Taxonomy” that will inform searches, enable browsing and lead users toward more productive results – and, ultimately, improve the user experience. It will also facilitate the sharing and importing of taxonomies by our Content Partners.

We see the Real Simple Taxonomy as a small tool – but one with a big potential benefit to our users. And it’s just one of several possible starting points, not an end point, to the great content you’ll find at LearnPhilanthropy.

What is a Real Simple Taxonomy?

Good content needs a good search – but sometimes a simple keyword search is not enough to produce the result a user seeks. That’s where a taxonomy comes in: a taxonomy is a classification or categorization system that groups similar items into broad topics or buckets. A taxonomy can help to organize knowledge “at a glance,” describe concepts not found directly in the content, and includes terms, categories and keywords.

With the LearnPhilanthropy community, we aim to co-create a small, simple taxonomy that can be iterated and refined over time. Small because we’re not trying to create something big and/or compete with what’s already out there. And small because we want it to be super high-functioning and actually *work*. To ensure the taxonomy remains relevant, we’ll iterate to improve it over time, and remain highly flexible and responsive to changing environments as we go.

Bottom line: the Real Simple Taxonomy terms must be intuitive to the uninitiated. And relevant across a range of organizations and donor types.

Why and how are we developing a Real Simple Taxonomy?

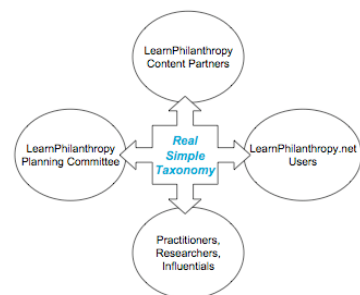
LearnPhilanthropy will bring together the wealth of research, resources and ideas on good practice from sources *across the sector*: imagine a farmer’s market providing not only fresh products from a variety of producers, all in one place, but also a gathering place where practitioners of all kinds can come together to exchange “recipes” and learning perspectives.

How will LearnPhilanthropy users find what they need at this market? To honor what users tell us they need to effectively navigate through these resources – and to improve the user experience – a general purpose taxonomy is needed to help make these resources more widely accessible.

Yet we’ve found that a general-purpose taxonomy just plain doesn’t exist. Our research to date – conducted in partnership with our Planning Committee, Content Partners, workgroup members and others in the field – has turned up taxonomies mostly for specific audiences or grantmaker types.

For this reason, LearnPhilanthropy is seeking to develop a general-purpose taxonomy. Not to create a new standard or because we think we have the “right” answers, but to support our users. So the approach we’re taking is iterative and highly collaborative – more user-generated “folksonomy” than the traditionally hierarchical taxonomy – with broad review at each iteration stage. We see this Real Simple Taxonomy as a living document, and encourage ongoing co-creation and co-ownership within the LearnPhilanthropy community.

We’re seeking input and feedback from a wide range of sources, to gain cross-functional perspectives. Folks we’re reaching out to include grantmakers of all kinds, researchers and providers of a full range of content and learning resources for philanthropy practitioners. Your views on this are important to us, so please take the time to share them at www.learnphilanthropy.org or by emailing us at catalogue@learnphilanthropy.net. Thank you for joining us and contributing to this work!



Draft Real Simple Taxonomy

Essentials:

- Philanthropy's history, role in society and current operating context (includes eg: size and shape of the sector; trends; public policy at the local, state, regional and federal levels)
- Mission & Values (donor intent; articulating mission, purpose, values)
- Standards, Codes and Ethics (research and best practices; benchmarks)
- Equity, Diversity and Inclusion (research and best practices)
- Legal issues & laws governing foundations and nonprofits (by-laws; articles of incorporation; self-dealing; advocacy by foundations; international grantmaking regulations)
- Financial Stewardship & Impact Investing (fund development; endowment payout and policy; perpetuity; investments; program- and mission-related investing [proxy voting, screening])

Developing Your Talent and Leadership:

- Governance (board roles, development, internal and external relations; strategic planning; succession and transition planning; risk management)
- HR management, policies and practices
- Communications (strategic internal and external communications; transparency)
- Individual development: strengthening/building your career (self-management; mentoring and coaching)
- Organizational development: strengthening/building your team (organizational life cycle; team building; team dynamics; mentoring and coaching; motivating staff)

Making and Managing Grants:

- Grantmaking (organizational due diligence/analyzing organizational capacity, analyzing financials, site visits; determining size, type [program and core general operating support] and duration of grants; leveraging impact of small grants/pooled funds; managing grant portfolios)
- Grants Management (applications; common applications; legal due diligence and compliance; reporting; information technology; repurposing grants; rescinded grants)
- Beyond the Grant (designing strategy and aligning resources; developing issue expertise; scanning environment and assessing needs; seeding initiatives; building and scaling initiatives; facilitative leadership, collaboration practices; networks; cross-sector partnerships; negotiation; project management; maximizing relationships with grantees; stakeholder engagement; civic capacity/community convening; working with intermediaries)
- General Grants (capital; strengthening nonprofit organizations/capacity building; technical assistance; networks; communications; policy, advocacy; social justice; volunteerism and service; community organizing; geography/place-based grants)
- Issue-specific Grants (arts, culture and humanities; education; environment; health; human services; international/foreign affairs; religion; other)

Planning for Results and Impact:

- Program-level learning and evaluation (effective planning at the grant, initiative and program levels; logic models and theories of change; internal and external evaluation; evaluation approaches and methods; utilizing evaluation, reflecting sharing and acting on results; grantee feedback)
- Organizational-level learning and evaluation (effective planning; internal and external evaluation; evaluation capacity building for funders; evaluation capacity building for nonprofits; logic models and theories of change; evaluation approaches and methods; utilizing evaluation, reflecting sharing and acting on results; grantee feedback)
- Field/Sector-level learning and approaches (multi-stakeholder, cross-organization learning; general and emerging approaches to effectiveness; data standardization; grantee feedback)

Big thanks to the following for their feedback and great suggestions to date:

To add your name to this list, please share your feedback at www.learnphilanthropy.net or contact us at catalogue@learnphilanthropy.net

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Real Simple Taxonomy v 1/12/12 - snapshot

Essentials					
Philanthropy's history, role in society & current operating context	Mission & Values	Standards, Codes & Ethics'	Equity, Diversity & Inclusion	Legal issues & laws governing foundations and nonprofits	Financial Stewardship & Impact Investing
Includes: •Size and shape of the sector, trends •Public policy at the local, state, regional and federal levels	Includes: •Donor intent •Articulating mission, purpose, values	Includes: • Best practices research, benchmarks	Includes: •Research, policies and best practices	Includes: •By-laws, articles of incorporation •Self-dealing •Advocacy by foundations •International grantmaking regulations	Includes: •Fund development •Endowment payout, perpetuity •Investing •Program- and mission-related investing (eg, proxy voting, screening)

Developing Your Talent & Leadership				
Governance	HR management, policies & practices	Communications	Individual Development / building your career	Organizational Development / building your team
Includes: •Size and shape of the sector •Board roles, development •Internal and external relations •Strategic planning •Succession and transition planning •Risk management	Includes: •Research, best practices, policies	Includes: •Strategic internal and external communications •Transparency	Includes: •Self-management •Mentoring •Coaching	Includes: •Organizational life cycles •Team building •Team dynamics •Mentoring and coaching •Motivating staff

Making & Managing Grants				
Grantmaking	Grants Management	Beyond the Grant	General Grants	Issue-specific Grants
Includes: •Due diligence: analyzing organizational capacity, financials, site visits •Determining size, type (program, core general operating support) and duration of grants •Leveraging impact of small grants/pooled funds •Managing grant portfolios	Includes: •Applications •Common applications •Legal due diligence and compliance •Reporting •Information technology •Repurposing grants •Rescinded grants	Includes: • Designing strategy and aligning resources •Developing issue expertise •Scanning environment and assessing needs •Seeding initiatives •Building and scaling initiatives •Facilitative leadership •Collaboration practices •Networks •Cross-sector partnerships •Negotiation •Project management •Maximizing relationships with grantees •Stakeholder engagement •Civic capacity/community convening •Working with intermediaries	Includes: •Capital •Strengthening nonprofit organizations/capacity building •Technical assistance •Networks •Communications •Policy, advocacy •Social justice •Volunteerism and service •Community organizing •Geographic/place-based grants	Includes: •Arts, culture and humanities •Education •Environment •Health •Human services •International/foreign affairs •Religion •Other

Planning for Results & Impact		
Program-level learning & evaluation	Organizational-level learning & evaluation	Field / Sector-level learning & evaluation
Includes: •Planning at the grant, initiative and program levels •Logic models and theories of change •Internal and external evaluation •Evaluation approaches and methods •Utilizing evaluation, reflection sharing and acting on results •Grantee feedback	Includes: •Planning at the organization or enterprise level •Internal and external evaluation •Evaluation capacity building for funders •Evaluation capacity building for nonprofits •Logic models and theories of change •Evaluation approaches and methods •Utilizing evaluation, reflection sharing and acting on results •Grantee feedback	Includes: • Multi-stakeholder, cross-organization learning •General and emerging approaches to effectiveness •Data standardization •Grantee feedback