



HIRI's Philanthropy Projects

Philanthropic strategy is inherently psychological, from the era of Rockefeller and Carnegie to today. This is true partly because the operations of philanthropy, even more than other sectors of society, are based on *relationships*. Impact often is achieved through *leverage* of resources that can be put to use more flexibly than those of government or business. And philanthropy is fundamentally inspired by the *motivations* of donors - their values, wishes and beliefs.

Behavioral sciences can contribute to philanthropic strategy in many ways - increasing understanding of how stakeholders "come to the table" to advise foundations on grantmaking, helping donors wrestle with the complex human dynamics of giving, and so forth. Results of such studies can be applied through consultation and technical assistance to foundations, donors, and the infrastructure supporting them (trusted advisors, membership associations, peer networks, etc.).

Since 1988 the Human Interaction Research Institute has studied philanthropy from a psychological standpoint - exploring how to improve its operations, and how to integrate donors and foundations into the work of community change. Recent Institute projects include (1) an evaluation of a foundation's peer network for urban child welfare leaders; (2) a study of peer networking and community change in American foundations; and (3) a study of peer networking and place-based initiatives supported by foundation and government funders. Results from these projects are reported in a 2011 *Foundation Review* article by Thomas E. Backer and Ralph Smith. The Institute also has worked for more than seven years to create and help administer a grant-making initiative for a family foundation.

The Institute has long investigated methods for improving diffusion of results from grantmaking, as reported in its 1995 book, *Dissemination and Utilization Strategies for Foundations: Adding Value to Grantmaking*. These methods have been applied through long-term interventions with the James L. & John S. Knight Foundation, Ewing M. Kauffman Foundation, and The California Wellness Foundation. Other recent studies have focused on (1) methods for building capacity and enhancing collaborative activities of small foundations, (2) strategies for sustainability of community initiatives, (3) peer learning groups for donors and family foundations, (4) national patterns of foundation innovations, as well as funding for nonprofit capacity building (since 2002 the Institute has maintained the world's largest database on this topic); and (5) the role of donor advisors (wealth managers, private bankers, trust attorneys, etc.) in shaping the philanthropic strategies of their high-net-worth clients. In September 2012, the Institute co-hosted a major conference on philanthropy in the San Fernando Valley with three large foundation sponsors.

The Institute maintains collaborative relationships with other academic and independent centers on philanthropy, such as The Philanthropic Initiative and the UCLA Center for Civil Society. Institute president Thomas Backer has written widely on philanthropy, and was a member of the International Network on Strategic Philanthropy. Research associate Jane Bleeg, who manages the Institute's foundation capacity-building database, was executive director for 13 years of the Rochester Grantmakers Forum. Advisors to the Institute's philanthropy projects include Peter Haight, former CEO of Fiduciary Trust International of California, and Allison Sampson, former executive director of the Colburn Foundation.