Case study: Developing a philanthropy toolkit

By Catriona Fay
13 July 2022

With so many worthy causes in the world, it can be difficult for philanthropists to work out which ones to support. Members of a family endowment or trust can struggle to reach a consensus on the kind of giving, the amount and the responsibilities within the family.

To assist them in this effort, we partnered with Stanford University to develop a philanthropy toolkit.

The toolkit helps philanthropists assess not-for-profits, identify the ones that are best aligned to the causes that matter most to them and to keep track of their giving. It includes conversation guides and checklists, which families and individuals can use themselves or in consultation with their advisers. The toolkit also contains a section on how to work with other philanthropists to maximise impact and build a network of like-minded givers.

"The philanthropy toolkit is a wonderful resource designed to help individuals and families articulate and share their values, while also providing tools to ensure those values are represented in their giving and social investments."

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