Philanthropic Investment [2022]
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Key resources this tool provides:

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- Get yearly investment data by area of focus
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*The picture of who is funding what and where, isn't complete without YOU!*
What data are we gathering?
Data Collection - first phase

Funding Type (From where are you funding?)

Program Area (What do you fund?)

Support Strategy (How do you fund?)
Funding Type
**Fund Type:** Fund type from which grants were allocated.

- Endowment Fund
- Fund
  - Charitable gift funds
  - Commercial gift funds
  - Designated funds
  - Diaspora funds
  - Discretionary funds
  - Donor-advised funds
  - Federated funds
  - Restricted funds
  - Scholarship funds
  - Tribal funds
  - Unrestricted funds
  - Venture philanthropy funds
  - Women's funds
Definitions of program areas

What are you funding?
Program Areas (defined): Specific program area name used by the funder to categorize the support. What mission are you impacting?

- Agriculture
- Arts and culture
- Community and economic development
- Education
- Environment
- Health
- Human rights
- Human services
- Information and communications
- Philanthropy
- Public affairs
- Public safety
- Religion
- Science
- Social sciences
- Sports and recreation
- Unknown or not classified
Agriculture

The development and improvement of biological, renewable food and material resources and the systems that produce them - natural, commercial, and industrial. Included are: agricultural activities that improve management of food production and the health of the land and water on which farms and ranches depend; forestry and forest management activities that support the health and productivity of those resources and regions; fishing and fish farming activities that support the health and productivity of that food resource; and efforts to ensure the security, amount, and appropriateness of the food resources available to communities and other groups.
Arts and culture

Enjoyment or understanding of the visual, performing, or folk arts or the humanities (history, art history, modern and classical languages, philosophy, ethics); and organizations that promote the appreciation or understanding of historical events, including historical societies and genealogical or heredity-based organizations (e.g., Sons of the Revolution, Daughters of the Confederacy, etc.). Includes museums and halls of fame; historic preservation programs; groups of or services to artists, performers, entertainers, writers, or humanities scholars; programs which promote artistic expression of or within ethnic groups and cultures; and art and performing art schools, centers, and studios. Does not include libraries and reading programs (see Education); botanical gardens, nature centers or zoos (see Environment).
Community and Economic Development

Work to strengthen the health and prosperity of communities and increase the capacity of various community organizations to improve the quality of life for all, including community and neighborhood development and improvement services; urban, rural, and sustainable economic development programs; business and financial services and services to improve or develop commercial and industrial enterprises within communities; services to enhance, improve, and protect the workforce and promote employment; efforts to develop and rehabilitate community housing, and organize tenants and homeowners; and community service programs.

- Business and industry
- Community improvement
- Economic development
- Financial services
- Housing development
- Sustainable development
Education

All formally constituted educational institutions (except art and performing art schools) and projects or activities that administer or support those institutions; libraries; organizations whose primary purpose is to provide opportunities for supplementing and continuing education outside the framework of formal education institutions (including English-as-a-second-language programs and literacy and reading programs for children and adults); and organizations that provide educationally related services to students and schools, e.g., educational testing services, scholarship programs, drop-out prevention and programs designed to increase parent participation in the schools.
Environment

Preservation and protection of the natural environment: including pollution control and abatement programs; conservation and responsible development of natural resources; biodiversity preservation and wildlife conservation; protection of animals, including domestic pets and animals providing special services; control or elimination of hazardous and toxic substances; solid waste management programs; and environmental education. Does not include programs that focus on the protection or preservation of farmlands or soil and water conservation for agricultural, food production purposes or livestock issues (see Agriculture, Fishing, and Forestry); or programs that focus on recreational parks (see Sports and Recreation).

- Biodiversity
- Climate change
- Domesticated animals
- Environmental education
- Environmental justice
- Natural resources
Health

Promotion and protection of the physical and mental well-being of people through medical care and treatment; assessment and amelioration of social, environmental, and biomedical factors affecting that well-being; research into various diseases and in various disciplines; and education and prevention activities that increase people's own efforts at protecting public health.
Human Rights

The protection and promotion of the human rights and civil liberties of individuals and communities. This includes protecting equal rights for and fighting discrimination against some categories of people; improving relations between racial, ethnic, and cultural groups; and promoting voting rights. Does not include organizations that focus on or provide legal services (see Legal services); or groups using advocacy as a method to achieve goals in a particular subject area such as food, housing and education. In these cases, select the most appropriate term in the subject area, and a Strategy of Equal access. For animal rights work, see Research on animals and Humane education (in Environment).

- Anti-discrimination
  - Children's rights
  - Disabled persons' rights
  - Ethnic and racial minority rights
  - Immigrants' rights
  - LGBTQ rights
  - Prisoners' rights
  - Rights of the aged
  - Women's rights

- Diversity and intergroup relations
- Individual liberties
- Justice rights
- Social rights
Human Services

Promotion and provision of a broad range of social or human services to individuals or families; family services, including shelters and aftercare programs for victims of domestic violence; direct social services to children and adolescents (e.g., adoption and foster care services, child day care, etc.); personal social services, travelers aid, etc.; residential, custodial care facilities and services for individuals unable to live independently due to developmental disabilities, age or physical infirmity; and programs that promote general independent functioning and living of individuals (e.g., retarded citizens associations, guide dog services for people with disabilities, etc.); job assistance programs that help those with significant barriers to employment, including special employment assistance for people who have disabilities or other disadvantages; housing rehabilitation, home improvement, shelters, and other non-recreational temporary housing facilities, and services to assist individuals and families in locating, acquiring, or sustaining clean, safe and adequate housing on a rental or ownership basis; programs that work to build character and develop leadership and social skills among children and youth, including scouting organizations; adult matching programs; business, agricultural, religious and other youth leadership programs; and youth community service clubs; food services for the poor and hungry, including dining facilities, food banks, and food delivery services

- Basic and emergency aid
- Family services
- Human services information
- Human services management
- Job services
- Personal services
- Shelter and residential care
- Special population support
- Youth development
- Advocacy
Information and Communications

The gathering, storage, organization, manipulation, dissemination, and display of data, information, communication, and narrative. Included are programs that develop or make use of information technology to increase the amount and complexity of data that can be managed; policies that work to insure broad availability of information; programs that gather and broadcast news and information about current events; libraries that store and make available information in a variety of formats; media organizations and programs that broadcast information across a variety of platforms; telecommunications services; and information science and computer applications.

- Communication media
- Information and communications technology
- Libraries
- Media access and policy
- News and public information
Public Affairs

Organizations or programs that focus on promoting the effective functioning of government, public administration and public officials; programs that conduct or promote research in multidisciplinary public policy (e.g., Joint Center for Political Studies); programs that support or provide services required for the effective functioning of society (e.g., public works projects, public utilities, public finance, legal and judicial systems, elections, etc.); programs that promote patriotism, encourage civic participation, and support national security; and organizations that protect the public against the distribution of unsafe goods and products, including product testing and reporting services. Does not include social services organizations that focus on the provision of human services (use terms in Human services); strict political science research (use Political science); or public policy research tied specifically to a major group area (use field-specific coding where possible).
**Philanthropy**

Organizations or programs that focus on promoting the practice of giving and volunteering or which represent and serve a wide range of philanthropy and charitable institutions; private grantmaking foundations and charitable trusts; federated giving programs that provide funding and other types of assistance to community services (e.g., United Way, Jewish Federation); programs that promote individual giving through pooling of funds or trusts for maximal financial and program administration performance (e.g., public foundations and community foundations); and programs that provide management and administrative support to philanthropic and nonprofit organizations and projects. Does not include fund-raising, distribution services, or volunteer bureaus and volunteer action centers operating in a specific major group area (see Support Strategy and Organization Type terms).

- Foundations
- Nonprofits
- Philanthropy and public policy
- Venture philanthropy
- Voluntarism
Public Safety

Protection and relief of the public from crime, violence, disaster, accident, and other potential causes of harm. Included are crime, abuse, and violence prevention services; police and other law enforcement agencies; detention and rehabilitation services for offenders and ex-offenders; judicial and administration of justice activities; legal assistance to individuals and organizations, including groups whose primary purpose is to conduct public interest litigation; activities to prevent, predict or control the effects of disasters; educate and prepare individuals to cope with the effects of disasters; provide broad-based disaster relief services to victims; provide relief to victims of accidents caused by human frailty or error (e.g., poisoning, choking, electrical shock, falls); first aid training and services; and many kinds of safety education and promotion. Does not include agencies that provide aftercare services to the victims of crime or abuse and neglect (see Victim services, Domestic violence, Rape victim services, and other terms).

Disaster Relief: Natural disasters are naturally occurring environmental disasters and emergencies, including droughts, earthquakes, famines, floods, hurricanes, forest fires, tornadoes and tsunamis. Non-natural disasters are man-made emergencies or disasters, including industrial accidents (explosions, oil spills, gas and chemical leaks), train derailments, terrorists attacks, and building and infrastructure collapses.
Religion

Worship, religious training or study, governance, or administration of organized religions, or the promotion of religious activities. Does not include other services operated under the auspices of specific religious groups such as educational institutions, hospitals, social service agencies, etc. For separately organized graduate schools of theology, use Theology and Graduate and professional education.
Science

Efforts to promote or conduct research and study in the physical and life sciences, mathematics, engineering and technology. Does not include medical research; or research institutes and services operating in a single major group area. For these organizations and programs, use the most appropriate subject code, and a research code from either the Organization Type or Support Strategy facets.

- Biology
- Engineering
- Forensic Science
- Mathematics
- Physical and earth sciences
- Technology
Social Sciences

The study of, teaching of, or research in one or more of, the social sciences, including economics, psychology, political science and demographics. Also includes interdisciplinary research programs such as black studies and urban studies.

- Anthropology
- Economics
- Geography
- Interdisciplinary studies
- Law
- Paranormal and mystic studies
- Political science
- Population studies
- Psychology and behavioral science
- Sociology
Sports and recreation

Services meeting the recreational needs of individuals and communities, including camps and camping programs; physical fitness and other recreational facilities such as parks, playgrounds, etc.; sports training and competition services; and other sports, recreational and social clubs. Does not include programs primarily involved in character building and leadership development for youth such as scouting, even though they may also provide recreational programs (see Youth development); or neighborhood centers, senior centers and other community centers primarily engaged in the provision of social services (see Human Services).
How do you fund?

Support Strategy and Transaction Type
Support Strategies and Transaction Type

- Capacity-building and technical assistance
- Capital and infrastructure
- General support
- Individual development
- Leadership and professional development
- Network-building and collaboration
- Policy, advocacy and systems reform
- Presentations and productions
- Product and service development
- Program support
- Regranting
- Research and evaluation
Philanthropic Investment Intake Walkthrough

bit.ly/PhilanthropicInvestment
Part 1: Introduction

Philanthropic Investment 2022

Introduction

Grantmaking

Grants

We envision a philanthropic ecosystem capable of tackling the critical challenges and opportunities of our time.

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## Part 2: Grantmaking

### Contact and Organization Information
- **Email**: 
- **Name**: 
- **Organization Name**: 
- **Organization Mission**: 
- **Phone**: 

### Grantmaking
- **Fund Type**: 
- **Grantmaking Calendar**: 
- **How many grants do you make in a given year?**: 

### Support Strategies and Transaction Type
- Capacity-building and technical assistance
- Capital and infrastructure
- General support
- Individual development
- Leadership and professional development
- Network building and collaboration
- Policy, advocacy, and systems reform
- Presentations and productions
- Product and service development
- Program support
- Program evaluation
- Research and evaluation

### Program areas
- Add one or more program areas
- **Annual Grantmaking per Calendar Year**: $0.00

### Sustainable Development Goals (SDGs)
- **Do the program areas (funding) of your foundation address the Sustainable Development Goals (SDGs)**: Yes ☑ No

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*Note: The form is for the Philanthropic Investment 2022 process and is used for inputting contact and grantmaking information.*
Contact and Organization Information

Email *

Phone *

Name *
First
Last

Organization Name *

Organization Mission *
Sustainable Development Goals (SDGs)

Do the program areas (funding) of your foundation address the Sustainable Development Goals (SDGs)?

- Yes
- No
Sustainable Development Goals (SDGs)

Do the program areas (funding) of your foundation address the Sustainable Development Goals (SDGs)

- [ ] Yes  
- [ ] No

Select the SDGs that you understand are having an impact with your work.

- [ ] SDG 1 - No poverty
- [ ] SDG 2 - Zero hunger
- [ ] SDG 3 - Good health and well-being
- [ ] SDG 4 - Quality education
- [ ] SDG 5 - Gender equality
- [ ] SDG 6 - Clean water and sanitation
- [ ] SDG 7 - Affordable and clean energy
- [ ] SDG 8 - Decent work and economic growth
- [ ] SDG 9 - Industry, innovation and infrastructure
- [ ] SDG 10 - Reduce inequalities
- [ ] SDG 11 - Sustainable cities and communities
- [ ] SDG 12 - Sustainable consumption and production
- [ ] SDG 13 - Climate action
- [ ] SDG 14 - Life below water
- [ ] SDG 15 - Life on land
- [ ] SDG 16 - Peace, justice and strong institutions
- [ ] SDG 17 - Partnership for the goals
**Part 3: Specific Grant Information**

**Philanthropic Investment 2022**

<table>
<thead>
<tr>
<th>Introduction</th>
<th>Grantmaking</th>
<th>Grants</th>
</tr>
</thead>
</table>

Almost done. Please add specific grant information.

Upload Excel file with specific grant information

[Upload] or drag files here.

Instead of uploading the file, you can add specific grant information below

<table>
<thead>
<tr>
<th>Grant Title</th>
<th>Organization Receiving Grant</th>
<th>Grant Focus</th>
<th>Grant Duration (in month): Duration of funding at the time the support was awarded, expressed in months.</th>
<th>Grant Start Date</th>
<th>Grant End Date</th>
<th>Grant Amount</th>
<th>Grant Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Title]</td>
<td>Organization Name</td>
<td>Choose focus</td>
<td>Grant Duration Date</td>
<td>Date</td>
<td>Date</td>
<td>$</td>
<td>Outcomes</td>
</tr>
</tbody>
</table>

[Add Item]

After completing the information, click on submit.