Toward a Real Simple Taxonomy: Bridging Learners and Content to Create New Value @ LearnPhilanthropy (v_3/12/2012)

By Dara Major

Overview

Is there a difference between good and great philanthropy? We believe the answer is: yes.
We believe intentional, ongoing learning is a critical component of great philanthropy – and that it is possible to identify what effective grantmakers learn, and do, in order to achieve the results they seek.

LearnPhilanthropy is a network of grantmakers and philanthropy support practitioners who are building a fieldwide hub for grantmaker learning – by the field, for the field.

LearnPhilanthropy was launched on the widely-held premise that there <u>is</u> 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 <u>together</u> 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 building a prototype platform 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 <u>navigate</u> 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. Over time, we will facilitate the sharing and importing of additional tags and taxonomies by our community of users, too.

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 are *co-creating* 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 is bringing together the wealth of research, resources and ideas on good practice from sources *across the sector*: imagine a farmer's market providing fresh products from a variety of producers, all in one place, as well as 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 on grantmaker learning 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.

But taxonomy is not the same thing as navigation! Though we hope this entire taxonomy will make it into the prototype platform…. to date, only a small slice of the taxonomy has actually been baked in to the platform pie. Most keyword topics or tags are not operational yet. That work is proceeding on a parallel but much longer technology execution timeline. Ditto re supporting contributions of additional tags and taxonomies by our community of users. In other words, this is a multi-faceted work in progress.
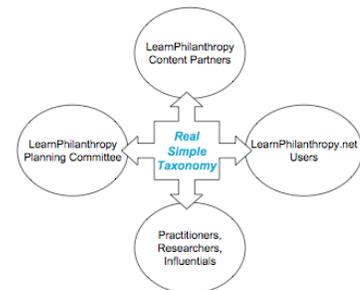
For now, we're seeking input and feedback from a wide range of sources, to gain cross-functional perspectives. Folks we're reaching out to include grantmakers of all kinds, researchers and providers of a full range of content and learning resources for philanthropy practitioners. Your views on this are important to us, so please take the time to share them by emailing us at info@learnphilanthropy.net. Thank you for joining us and contributing to this work!

LearnPhilanthropy The Field-wide Hub for Grantmaker Learning *Real Simple Taxonomy*

Essentials

Philanthropy's history, role in society & current operating context	Philanthropic models and approaches	Mission & Values	Standards, Codes & Ethics	Equity, Diversity & Inclusion	Legal issues & laws governing foundations, nonprofits	Financial Stewardship
Includes: •Size and shape of the sector, trends •Public policy at the local, state, regional and federal levels	Includes: •Independent, community, corporate, family foundations •Donor advised funds •Venture philanthropy •Social entrepreneurship •Hybrid models/L3Cs •Strategic philanthropy •Impact investing	Includes: •Donor intent •Articulating mission, purpose, values	Includes: • Best practices research, benchmarks •Conflicts of interest •Codes of ethics •Transparency	Includes: •Funds by and for communities with a racial, ethnic, tribal, gender- and sexual-orientation focus •Inclusive leadership approaches and networks •Research, policies and best practices	Includes: •By-laws, articles of incorporation •Self-dealing •Whistleblower policies •Advocacy by foundations •International grantmaking laws, regulations	Includes: •Fund development and establishment •Donor cultivation and services •Endowment payout, perpetuity •Endowment 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: •Recruiting •Training •Staff retention •Benefits/compensation •Job descriptions •Research, best practices, policies	Includes: •Strategic internal and external communications •Branding •Reporting •Transparency •Social media, e-newsletters, etc.	Includes: •Professional development •Career goals, development plans •Self-management •Mentoring •Coaching •Work/life balance (see also Beyond the Grant, below)	Includes: •Organizational life cycles •Team building •Team dynamics •Mentoring and coaching •Motivating staff •Conflict management (see also Beyond the Grant and General Grants, below)

Making & Managing Grants

Grantmaking	Grants Management	Beyond the Grant	General Grants	Issue-specific Grants
Includes: •Due diligence: reviewing proposals, analyzing organizational capacity, financials, site visits •Size, type (program, core general operating support, program-related investments) and duration of grants (multi-year, renewal grants, etc) •Leveraging impact of small grants/pooled funds •Managing grant portfolios	Includes: •Applications, reporting •Common applications, reporting •Legal due diligence and compliance (including international grantmaking laws and regulations) •Information technology •Repurposing grants •Rescinded grants •Grant management software	Includes: • Designing/reviewing strategy and aligning resources •Developing issue expertise •Scanning environment and assessing needs •Civic capacity/community convening/stakeholder engagement •Maximizing relationships with grantees •Seeding initiatives •Scaling initiatives •Networks •Collaboration •Cross-sector partnerships •Working with intermediaries •Negotiation •Project management	Includes: •Capital •Strengthening nonprofit organizations/capacity building •Technical assistance •Communications •Policy, advocacy •Community organizing •Geography/place-based grants	Includes: •Arts, culture and humanities •Education •Environment •Health •Human services •International/foreign affairs •Religion •Social justice •Volunteerism & service •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 •Designing/reviewing strategy and aligning resources •Logic models and theories of change •Evaluation approaches and methods •Advisory committees •Utilizing evaluation, sharing lessons and acting on results •Engaging stakeholders, grantee feedback	Includes: •Planning at the organization or enterprise level •Designing/reviewing strategy and aligning resources •Evaluation capacity building for funders •Evaluation capacity building for nonprofits •Logic models and theories of change •Evaluation approaches and methods •Advisory committees •Utilizing evaluation, sharing lessons and acting on results •Engaging stakeholders, grantee feedback	Includes: • Multi-stakeholder, cross-organization learning •Data standardization •Engaging stakeholders, grantee feedback •General and emerging approaches to effectiveness

Big thanks to the following for their input and feedback to date:
To get involved, please contact us at info@learnphilanthropy.net

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