Philanthropy Data Commons Pilot Participation

Philanthropy Data Commons Overview:

The Philanthropy Data Commons (PDC) is the collection, standardization, and integration of data intended to support collective activities in grantmaking while reducing the burden on funders and organizations seeking their grants.

This work has been anchored in the following **principles**, which are critical to the success and viability of this project.

- **Interoperable and extensible** – PDC is not reliant on specific or proprietary technology infrastructure, is able to bring data in and out through a robust API model, and is able to expand its functionality as needs arise.
- **Shared and collaborative governance of, by and for the sector** – We are co-creating the PDC with a cohort of stakeholders representing a variety of sector stakeholders.
- **Transparent and enduring** – Our goal is to leverage data and tools that already exist; not to replace existing tools, but to connect and enhance them.

We believe that the **value propositions** of delivering a "common application" using the PDC for the philanthropic sector include the following:

- Create opportunities for more equitable access to philanthropic resources;
- Democratize data sharing among organizations seeking grants, organizations making grants, and other organizations vital to the sector;
- Reduce applicant and funder administrative burdens and the costs associated with the grant application processes; and
- Expedite and expand access to capital for organizations seeking grants.

We see great potential for the PDC beyond the initial use case of a "common application." This work could eventually shift how funders engage with organizations seeking grants. The working shared data platform (and data and transaction flows) and the collaborative governance and principles that are core to this work could become new structures in philanthropy that facilitate different ways of working together. The PDC is rooted in building trust among all stakeholder groups in philanthropy over time, which ultimately will lead to and create more equity and inclusiveness in philanthropy.

The PDC has the potential to change how we all work in philanthropy by:

- Enhancing the sharing and applicability of data and information
- Promoting and enabling the adoption of common data standards and practices for thinking about and using data
- Reducing administrative burdens and costs for funders and organizations seeking grants
- Reducing the power imbalance between funders and organizations seeking grants, or even eliminating it or inverting it!

Pilot Overview:

After delivering a [Proof of Concept](#) in late 2021, the PDC team is putting together a pilot to test the viability of the PDC and the common grant application for the sector.

In the pilot, we will test the following hypothesis: by demonstrating both end-to-end data and transaction flows with involved parties (funders, organizations seeking grants, GMS vendors, and infomediaries) and collaborative governance of the data sharing model, we will deliver the tangible benefits for the philanthropic sector outlined above as the value propositions.

Role of Pilot Participants:

In order to test the above hypothesis and deliver the benefits for the philanthropic sector outlined above, we aim to bring together organizations seeking grants, funders, GMS vendors and infomediaries to pilot an actual grant cycle. Through this pilot, a group of funders will conduct their grant making – real funding requirements, real applications and real grant decisions – with the PDC.

Participants will co-create the pilot with the project team: helping to deliver and test the first use case of the common grant application, design the application process and data flows, and decide the governance structures for the PDC. As such, the pilot participants will become the "governing body" of the common grant application use case.

We are seeking individuals and organizations interested in working in a collaborative manner to bring something truly innovative to the philanthropic sector. As mentioned above, we anchor this work in the guiding principles of the PDC and expect all participants to agree upon and adhere to these principles. We do not have all the answers and are seeking partners in this work who are comfortable with ambiguity, not afraid to build and test something new and make decisions with the good of the whole sector foremost in mind. Participants must be champions for this project within their organization and commit to working with our team to plan, test and evaluate the efficacy of this initiative between April 2022 and October 2022.

We look forward to highlighting our pilot participants on the PDC website and in communications about the PDC pilot. Your participation in this work will be revolutionary for the sector, and we will work to celebrate and actively share your commitment to creating a more equitable, transparent and efficient philanthropic sector.

Specific Participation Requests:

Group	Participation Requirements

Funders	• Run a grant cycle leveraging PDC. Ideally participants will be able to run a grant cycle between 5/1/22 and 9/30/22, possibly in collaboration with other funders.
	• Commit monetary resources to compensate organizations seeking grants who do not get funded in this cycle for providing feedback on the pilot experience
	• Commit staff to this effort for the duration of the pilot, including but not limited to:
	  o Project point person who will be our main point of contact
	  o Program Officer(s)
	  o Grants Management professionals
	  o Lawyers
	  o IT Professionals
	  o Please note – not all these roles will need to be involved in the entirety of the pilot. Most will be asked to commit time to review, provide feedback and recommendations, and participate in specific meetings, as needed.
	• Ensure involvement from and with your GMS vendor and nonprofits
	• Provide governance engagement and support
	• Potentially support PDC with additional dollars to seed future development, as well as provide education/awareness of the initiative
	• Coordinate communication about your participation in this pilot with the project team
	• Be open to ambiguity

GMS Vendors	• Participate in your funders' grant cycle leveraging PDC. Ideally participants will be able to run a grant cycle between 5/1/22 and 9/30/22, possibly in collaboration with other funders. • Share data to/with PDC • Support API / participate in development of standard • Commit staff resources for the duration of the pilot • Support trust levels as determined by organizations seeking grants • Interact with other GMS vendors • Suggest organizations seeking grants and funders to participate in the pilot • Coordinate communication about your participation in this pilot with the project team • Be open to ambiguity and collaboration
Infomediaries	• Participate in a grant cycle leveraging PDC. Ideally participants will be able to run a grant cycle between 5/1/22 and 9/30/22, possibly in collaboration with other funders. • Share data to pre-populate the PDC and back to a funder's GMS system • Support API / participate in development of standard • Support trust levels and agree to honor data field and organization sharing requests of organizations seeking grants • Agree that collaboration members must approve any additional costs an infomediary may pass onto its customers related to the PDC. The costs do not permit an infomediary to use the data beyond the approved use. • Commit staff resources for the duration of the pilot • Suggest organizations seeking grants and funders to participate in the pilot • Coordinate communication about your participation in this pilot with the project team • Be open to ambiguity and collaboration

Collaboration Advisors	• **Role:**
	  o Provide subject matter expertise and thought leadership to the Philanthropy Data Commons pilot
	  o Help to monitor, support and sustain the broader PDC initiative. Advisors may also help to prioritize potential future work (new use cases) and provide guidance on the future sustainability of PDC.
	  o Help to evaluate the success of the pilot by providing feedback on hypotheses and evaluation plans
	  o Help in broadcasting this initiative and include their names on the PDC website

	- o Will <u>not</u> have governance authority for the PDC **Requested time commitment:** - o Engagement in one-on-one or small group discussions to provide feedback on specific areas of focus on the development of PDC. - o ~2 hours/month **Term:** - o Collaboration Advisors will serve throughout the pilot phase of PDC. **Participants:** - o May include funders, organizations seeking grants, philanthropy serving organizations, GMS vendors, infomediaries, system integrators and other subject matter experts on grantmaking, data commons, and governance.

Estimated Time Commitment for Pilot Participants

- <u>Planning Phase</u> (April – July, 2022)
  - o Pilot participants will be expected to participate in bi-weekly meetings with the project team to review and provide feedback on PDC structure and development of first use case of CGAP.
- <u>Pilot</u> (May – December, 2022)
  - o During the pilot, participants will run a grant cycle via PDC. We anticipate this adding 20% time to typical processes.
- <u>Post-Pilot</u> (November 2022 – January 2023)
  - o Pilot participants will support in evaluation by providing feedback on their PDC pilot experience.