

ABSTRACT

Increasing Quantitative Analysis in Baylor's Philanthropy Lab Course

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This paper examines the decisions, results, and implications of Baylor's spring 2017 Philanthropy Lab class grants. The paper first outlines the research and decision making processes utilized by the class in the spring 2017 semester. Two grants made to the organizations UnBound and R Labs act as case studies for analysis of successes and failures within these grants. Both grants deviated from their original intent, and thus provide insight to process improvements. These case studies act as the foundation for an analysis of how to improve the philanthropy course and decrease the likelihood of negative outcomes. Final recommendations for the course focus on increasing quantitative analysis in the grant-making process. This includes increasing project research, analyzing organization funding sources, and researching organization and industry metrics. The primary aim of these changes is to lessen the potential downside risk of grants with more thorough thought processes.

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INCREASING QUANTITATIVE ANALYSIS IN BAYLOR'S
PHILANTHROPY LAB COURSE

A Thesis Submitted to the Faculty of
Baylor University
In Partial Fulfillment of the Requirements for the
Honors Program

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Waco, Texas

January 2020

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CHAPTER ONE

Introduction

Spring 2017 Initial Goals

When we began the 2017 semester of the Baylor Philanthropy Lab, there were a few overarching goals that we had as a class in partnership with Dr. Hogue and the national Philanthropy Lab program.

Our primary goal was epitomized in our class maxim, to “do the most good” with our philanthropic giving. We spent a lot of time and energy investigating what it meant to use our dollars not only positively, but efficiently. Our class all knew what it meant to give to a good cause – but we wanted to know how to give to the best cause. The issue in this – which I did not realize would be such a pervasive problem until much later in the semester – was that each of us has a different version of what the “best” use of money is. This subjectivity became one of the greatest challenges throughout the course. In reflection, this was also one of the biggest stumbling blocks from allowing us to adequately measure our grants and provide feedback to the 2019 Philanthropy Lab semester.

Our next goal, which resulted from the first, was to strategically distribute \$50,000 in a way that reflected what we found to be the most effective use of money. Our class was split into four groups, and each of these groups would receive \$10,000 to use in the most effective way possible. We would decide collectively as a class what to do with

the remaining \$10,000. This also proved to be a great challenge, as the subjectivity in the first goal pervaded our decisions of how to utilize this money.

In essence, our two major goals included one of learning and one of action. In an attempt to create order as we pursued these goals, our professor Dr. Hogue helped our class break the semester into three distinct parts.

First, we spent time in research. We spent multiple weeks discussing the philosophy behind charity, philanthropy, and giving. This informed each class member's position on what it means to "do good" in the world. This ultimately persuaded how our charitable efforts were focused. We then used these newfound insights to launch us into research on specific problems in the world and in our Waco community.

Second, we began to seek out solutions to these problems. We found organizations that appeared to meet the needs of the community that we wanted to address, and we focused our efforts on learning about them. This essentially created a round of finalists from which we chose the organizations that would receive grants at the end of the semester.

Finally, in the third portion of the semester, we determined grant recipients. We allocated the \$50,000, and received an extra \$12,500 in grant dollars to allocate by the time we finished. This included both the use of individual groups' funds of \$10,000 each, and a communal \$22,500. This was the end of the 2017 spring semester's journey until 2019 when it came time to reevaluate the grants we distributed.

The rest of this chapter outlines each of these specific segments of the semester, along with some insights on how I personally contributed to these goals. Additionally, I

focus on grants made to two organizations in particular, UnBound and R Labs, to show insights on how we could have been more effective in our grant allocation process.

Philanthropy Lab Philosophy and Research

We began the semester with several readings and exercises to determine what was worthwhile and efficient when deciding how to spend charitable dollars. These efforts certainly led to positive results by encouraging our class to think critically. Most importantly, they increased the differences in how each individual came to the decision about what was important. These exercises became the foundation of the months we spent together.

The first exercise we undertook was to determine the impact we could make with \$10. Each student received \$10 and was tasked to “do the most good” with that amount possible. The exercise was valuable – we had no measuring stick by which to judge our actions. We only had an introductory class reading to set the tone of generosity. The variety of the results was tremendous. No student spent their money in the same way. Results ranged from donations to online non-profits to donations to mission trips to buying lunch with a friend.

This practice was a microcosm of the way we would interpret our philanthropies throughout the semester. Each cause was worthy and depended on the situation and perception of the donor in relation to the recipient. I argue that our class took the same perception as this exercise and applied it to our grant allocation process during the 2017 semester. Though we started with the same fundamental practices, we diverged in research. This gave us both strengths and weaknesses in our long-term perceptions of the grants.

We all started with the same fundamental building blocks in the class. We each read excerpts from *We Make a Life by What We Give*; *Giving Well, Doing Good*; and *The Essence of Strategic Giving*. These readings were valuable in encouraging the class to think deeply about philanthropy and our role in grant-giving. However, the focus was often not on tangible items and was instead on perceived impact. For example, in *Giving Well, Doing Good*, one of our readings encouraged us to “guard the soul of your own organization, even from your own pretensions” and to “help fight the battle for our soul” (qtd. Ylvisaker 463-465). In another excerpt, we read, “We are moved to give not by a desire to ensure that nothing is wasted, but from an inspiration to help” (Gunderman 136). Learning about the higher purposes of philanthropy is a valuable and worthwhile effort, but we had a strong focus on intangible aspects of giving.

Several of our readings did have a tangible focus on optimization. One podcast, “My Little Hundred Million,” by Malcolm Gladwell dissected good and bad educational philanthropic gifts, focusing on why the largest educational donations go to the richest universities. The ensuing discussion led the class to consider that not all gifts are equally effective, and what it means to maximize philanthropy. In this required text, we grappled with the highest potential for good, if there is such a thing as a bad gift, and how to prioritize giving.

Even more concrete, reading the *Essence of Strategic Giving* encouraged our class to put our grants into logic models. This reading was paramount to our final grant analysis. Frumkin frames decisions into logic models involving theories of leverage, change, or scale. It was one of the most grounding excerpts we read, encouraging us to think actively about the immediate and long-term results of our giving. Frumkin provided

a relatively standardized way for us to view grants and their impacts, which is a key factor in strategic comparative analysis.

Armed with these collective readings and discussions, the class split into four groups and researched different areas of need and injustice. The research phase of our semester led each group to think specifically about two to four issues, which influenced the non-profit organizations with which we would interact. These issues included education readiness, human trafficking, veteran aid, health care accessibility, and more. Each team wrote a two to four page research report detailing the background information and potential forms of aid for these problems. This research laid the foundation and informed our decisions for the rest of the semester.

Philanthropy Lab Organizational Research

With our newfound research-based insights, we moved forward to more concrete analysis of potential donations. Each of the four class groups received eight to eleven local non-profit organizational biographies. Our class held a “Pitch Day” meet and greet with as many organizations as possible. Each organization shared how they hoped to use class grant money to impact their organization and our community.

Each step of the process led the class to be more intentional in their grant selection. Following Pitch Day, we narrowed our organizational choices to those with which we would have site-visits. This required us to narrow our organizations from ten to around four. Some organizations clearly showed better planning and resource management than others; however, some elements of this were judgment based as well. For example, the reason our class did not choose to move forward with Waco Diaper Bank was that “they have many more resources in comparison with other organizations

we have researched” (Bartlett et al. 26). This is a definitive judgement on resource availability. However, the class’s reason to not move forward with Family Abuse Center was that “We have a couple others whose projects and needs we had a greater pull towards” (Hillebrand et al. 39). While this judgement is not inherently right or wrong, it is still subjective and lacks tangible reasoning. Grant-giving is certainly an art to some extent, but there is still room for this decision to be more strongly quantified.

Once our class determined which organizations we would move forward within the grant process, we conducted site visits with these groups. Each organization showed us their daily proceedings and how a grant would impact the work they do in the community. These more concrete grant proposals were the most informative elements to our final decision process. Our primary goal was to find the intersections between our initial research and the organizational proposals to find the best grant opportunities.

Final Grant Decisions

After visiting each organization’s physical site and meeting with their executives, our class faced the final decision of how to allocate grant money. Each group ultimately decided based on the strengths of the organizations, the grant proposals, and management how to allocate grants. For each grant, the students utilized Peter Frumkin’s logic model. This included three theories. First, the a theory of leverage details “philanthropic inputs” to projects, usually detailing grant amounts. Second, a theory of change details “activity,” “outputs,” and “outcomes” of the philanthropic project, which highlights the immediate implications. Thirdly, a theory of scale detailed the “broad public impact” of grants, expanding the scope of the project to more expansive goals (Frumkin 52). These theories

worked together to form a logic model that assured students detailed the potential impacts of the class's grants.

First, students detailed the theory of leverage for each grant. For most students, this simply entailed the amount of the class's grant allocation as the "philanthropic input." If a matching grant opportunity was available, such as for the class's grant to Caritas, this was listed as well (Callison et al. 47). This part of the logic model is straight forward because it focuses on the immediate effects.

Next, students shared their theory of change for each grant. The activity section outlined the grant goals as listed by the organization in the grant proposal. These were usually specific, such as Waco Hispanic Museum's "Rebuilding La Pila, a historic site in Waco" (Hillebrand et al. 56). Outputs then expanded on these activities, sharing any immediate or tangible effects from the grants. Continuing with the La Pila example, this created a "location for visitors to sit and learn about the history of the site" (Hillebrand, et al. 56). Then, outcomes shared long-term results for the individuals affected by each organization. For La Pila, this included increasing "Pride in the Hispanic Community" (Hillebrand, et al. 56). Each step gradually expanded the goals, growing from concrete to ideological.

Finally, the theory of scale displayed the broader community- and world-wide impact students hoped to effect through these grants. These were much larger and widespread goals. For La Pila, it was to "bring awareness to the presence and rich history of the Hispanic community" (Hillebrand, et al. 56). Again, the theory of leverage took the goals one step further into considering widespread and societal impacts.

These logic models confirmed the final decisions of grant allocations. After this final analysis, we allocated our grants to each organization. With our grants, we sent a grant evaluation form to each organization. We informed the organizations we would follow-up in two years to see the progress of the project. These included specific follow up questions about how the money was spent and intangible questions about the general impact on the community.

Spring 2017 Conclusion

The spring 2017 Philanthropy Lab semester was incredibly successful in supporting grants that helped the Waco community and made strong impacts in their target populations. However, while there was clear success, there is always room for growth in the way we approach these community needs. Throughout the 2017 semester, decision making was usually an art rather than a science. Some element of this artfulness will never change – it is what makes philanthropy beautiful, innovative, and exciting. However, when hoping to maximize impacts and minimize failures, perhaps there is room to invite more science into this “art” of philanthropic grant giving.

The goal of this paper is to examine how we might invite even more intentionality into the grant-giving process for the Philanthropy Lab. I believe the class well-impresses upon students the duty to their neighbor they take upon themselves when joining this class. However, there are more active steps we can take to ensure that this responsibility is guided by reason. I examine two case studies from the grant results of the 2017 Philanthropy Lab semester, the UnBound and R Labs grants. These were two grants that deviated from our original anticipated outcomes. Both of these grants held successes, but showed proof that there is room for growth in the way we analyze potential grants. In the

pursuit of maximizing philanthropic impact, I hope this is another step on the path to
“doing the most good.”

CHAPTER TWO

Case Study 1: The UnBound Grant and Results

UnBound Research and Analysis

When our class split into groups based on areas of need, one student group honed in on education and human trafficking. In efforts to be informed grant-givers, we researched an issue report on Human Trafficking to better understand the impacts of trafficking in our society and locally in Texas and the city of Waco. We learned about how Waco's homeless population, poverty level, and geographic location contribute to its human trafficking risk factors (McBride et al. 27). We found this problem to be disturbing, so we focused on UnBound as a potential grant recipient.

UnBound originally proposed two different grants for us to consider. The first grant was an \$1,800 request for training equipment. One of UnBound's efforts in the community is training local professionals on how to identify trafficking and serve victims. This grant would fund training equipment, such as an iPad, laptop, speaker, and projector (Garnett, Grant Application). Their goal with this grant was to expand training capabilities, as they were limited by equipment needs.

The second grant UnBound proposed was a \$7,500 request for a case management system. Their prior case management system was essentially Microsoft Excel, which did not suit the customization and privacy needs of victims. They identified CaseWorthy as an ideal system that suited their needs, and was scalable to help other

UnBound chapters nationally (Garnett, Grant Application). Their hope was to provide a more comprehensive care system for the victims they serve.

Our group became enamored with the CaseWorthy grant because of its scalable potential. Natalie Garnett, the UnBound Waco director at the time, expressed to us the challenging elements of the current system and how integrated the CaseWorthy system would be upon installation. Additionally, there were hopes to use this at multiple UnBound chapters across the country and even with their English-speaking international affiliates.

Our individual group's maximum grant allocation was \$10,000, so we were unable to serve the CaseWorthy need in addition to other grants we desired to make to other organizations such as AVANCE or the Advocacy Center. However, in partnership with the rest of the spring 2017 Philanthropy Lab class, we were able to fulfill both of UnBound's grant needs. We made a total grant allocation to UnBound of \$8,300. We created a logic model based on Frumkin's theories of leverage, change, and scale to measure how we felt the outcomes of this grant would affect the community.

Our theory of leverage included both the Philanthropy Lab's philanthropic inputs and UnBound's budget. UnBound's core budget comes primarily from its parent organization, Antioch Community Church. Philanthropic inputs for our leverage model included both the Antioch budget allocation and our \$8,300 grant (McBride et al. 76). We limited our inputs to the scope of our grants, though UnBound was seeking funding from other organizations as well.

Our theory of change included UnBound's Activities, Outputs, and Outcomes. We listed UnBound's "trainings, awareness events, campaigns, and victim recovery help"

as their current activities that will incite change (McBride et al. 76). These activities led to their outputs, which were forty to fifty victims rescued per year and numerous prevention trainings. UnBound's outcomes were increased trafficking awareness in McLennan County and multiple branches both nationally and internationally (McBride et al. 76). This all fed into a theory of change that UnBound's work would stop and prevent Human Trafficking from existing in its current levels in Waco, the U.S., and internationally.

Finally, our theory of scale focused on how UnBound's efforts impacted society. One key factor we viewed as important was their focus on recognition (McBride et al. 76). Because human trafficking is a largely ignored and elusive problem, their efforts to increase awareness could heavily impact the way society tackles this problem. Additionally, we saw a ripple effect in their efforts. By rescuing victims and giving them a second chance, UnBound encourages women's rights and female empowerment, and stimulates the legal economy by introducing these women back into the work force (McBride et al. 76). UnBound's actions have wide-spread impacts that might not always be accounted for in the numbers they provide.

Utilizing this logic model encouraged our group in the decision to support UnBound. However, we did not consider or request many concrete numbers in our evaluation of their model. To some extent, as found in the theory of scale, it is hard to quantify how some efforts will affect the community. However, the most concrete number we utilized was the forty to fifty victims they would serve per year using the CaseWorthy system.

On the whole, we researched as best we could and did our due diligence on the organization itself. Additionally, we focused on the impact the project could have within the organization and the population they served. We did not, however, further research on the CaseWorthy system itself, or any alternatives available to UnBound.

UnBound Grant Results

A pair of students from the 2017 Philanthropy Lab class conducted grant follow-ups in the spring of 2019, two years following the distribution of grants. Because Ms. Garnett was not at still at UnBound's Waco chapter, we sent a grant evaluation form to Ms. Garnett but conducted a site visit with the new director, Ms. Allison Denman, to assess the success of the grant.

First we evaluated the equipment element of the grant. According to UnBound's grant evaluation form, the training equipment was used to train around 7,500 people on human trafficking prevention. It serviced several populations in Waco. This includes at-risk youth prevention training and professional (i.e. doctors, police, school staff) detection and prevention training. It has not needed any repairs despite its heavy usage (Garnett, Grant Evaluation). This is an overwhelmingly positive impact for human trafficking prevention in Waco's community.

In addition, the training equipment is used to support and service other local organizations. The Advocacy Center's SAFE Conference used the equipment each of the past two years, training attendees on recognizing child abuse and child sex trafficking. It is also used in the Heart of Texas Human Trafficking Coalition and Not in My City Outreach meetings (Garnett, Grant Evaluation). We were pleased to see the positive

collaborations between UnBound and these organizations, allowing this equipment to serve multiple purposes.

Next, we asked about the CaseWorthy grant. Once implemented, the CaseWorthy system served seventy of UnBound's clients (Garnett, Grant Evaluation). UnBound's original goal was to scale the CaseWorthy system up once they fully utilized it in their Waco branch. However, CaseWorthy overpromised the UnBound staff on the system's customization, cost, and scaling capabilities. They were told it would be a flat installation fee, but in actuality, CaseWorthy charged hourly. Each change UnBound requested to best serve their staff and client needs further increased the expenditure going toward the system. Changes were laborious and ineffective to suit staff needs (Garnett, Grant Evaluation). Ultimately, UnBound decided to abandon CaseWorthy for a different case management system.

The case management system UnBound chose as a replacement is Apricot. They did not originally choose Apricot because each UnBound chapter would have to purchase the system separately. Ultimately, they found this was the best and most cost-effective solution in lieu of CaseWorthy, and smaller chapters could use safety protocols and encrypted google docs until they can purchase Apricot (Denman). Though the grant did not turn out as we originally anticipated, we are pleased at UnBound's ability to recognize that sunk costs do not justify keeping an inadequate system. They recognized when it was best and cost-effective to simply shift and move to another alternative.

At the date we gave our grant, our group was incredibly proud of each of these grants. However, I think if someone had asked us which of the two grants we anticipated to be the most successful, we would have buy and large listed the CaseWorthy grant as

the most successful and impactful grant we gave. CaseWorthy felt bigger and more important, and therefore as if it had more value.

In terms of realized impact, the allocation that financed the training equipment was actually far more successful. Both grants had good outcomes, but there is a clear difference in return on investment between the two grants. This is in part because of failures on CaseWorthy's part (which is out of our control), but also largely in part because we did not take time to financially model the results of our grants.

Our theories of leverage, scale, and change was a great model for forcing us to think about the long-term effects of our grants, but did not push us to quantitatively compare the impacts of one grant to another. Firstly, we did not create separate logic models for the two grants – we made logic models based on organization. However, to fully understand how to prioritize funds, we should have modeled these out as two separate decisions.

Using the Frumkin logic model was a step in the right direction. However, we did not try to use any type of concrete numbers or forecasts in our impact. If we had taken the time to think about the number of people that could have benefitted from prevention trainings versus a new case management system, we might have prioritized the grants differently. This does not mitigate the importance of a case management system; however, it invites more serious thought in the grant giving process.

For example, comparing these grants could be as simple as a back-of-the-envelope calculation. It would have been simple for us to ask the following four questions: How many trainings do you currently run each month? How many people

attend each training? How much would your capacity expand with the new equipment? Would you expect the same number of people to attend the new number of trainings?

A simple guess would have given us a tangible ball-park number of local impact. Around 7,500 people were trained using the tablet over the course of the two years since the grant. UnBound's estimates at the time might not have led to that exact number. However, we could easily have gotten a general range and better understood that thousands of people would receive preventative training.

On the other hand, for the case management system, we did request how many clients would benefit from the system. UnBound shared that it would benefit forty to fifty victims per year in Waco (Garnett, Grant Application). However, part of the reason we chose CaseWorthy was because we expected it would translate well to their national and English-speaking international chapters. However, we did not request numbers on how many English-speaking chapters they had or how many clients could be served in all the combined potential CaseWorthy-using branches yearly. These would have been easy estimates and would have given us guidance in our grant-writing process.

Additionally, we did not ask UnBound at the outset of the grant how many case management systems they had researched. We did not ask why CaseWorthy was better than another system they could choose. We took UnBound's claims at face value. I believe that UnBound did their research because of the conversations we had about the expected CaseWorthy features and what they were looking for in a system. However, even if UnBound did their due diligence as an organization, there is more we could have asked and checked to ensure the soundness of our decision.

UnBound Learning Outcomes

There are two primary learning outcomes that I take from the analysis of the UnBound Grant. The first is that the Philanthropy Lab should research grants more qualitatively and ask more questions. We undertook a lot of issue research on how to combat “wicked problems” in our community and the world. Then, we tried to thoroughly vet our organizations to ensure they were actively fighting these problems and requesting grants that promoted lofty goals. However, we did not take the final step, which was researching more into the grant idea itself. We did not stop to check if the system they proposed to us was the most efficient or why it was best for their organization.

Even if we had done due diligence on the case management systems, we likely would have agreed with UnBound’s request to purchase CaseWorthy. The reasons that UnBound is switching are related to overpromises from CaseWorthy staff to UnBound rather than its inherent inferiority to Apricot. However, we could have asked for their research documents and comparisons of why CaseWorthy was a good system. Or, we could have requested that they conduct a reference call with a current CaseWorthy client to see if they were satisfied with the system. It is obviously easy to implement recommendations like these in retrospect. However, there are still an abundance of steps we could have taken to look at the merits of all elements of the grant.

We took a very macro view of the CaseWorthy grant and viewed it as good for society. Additionally, we viewed it as important relative to other potential grants we could have made. However, I think we did not ask ourselves “is this the best possible use of UnBound’s resources?” or “what are the alternatives?” While these questions might

not change a grant, they at the very least encourage organizations to prove their intentionality in how they spend their resources. It reflects better on both the Philanthropy Lab and the organization's level of stewardship if we carefully examine every element of the grant process.

The second learning outcome I took from the UnBound case study is to quantitatively measure grants to the best extent possible. Our grant decisions were judgement calls, albeit informed ones, that did not rely on any quantitative analysis. Both of these grants were incredibly important. However, I think to some extent we viewed the equipment grant as lesser because it was less expensive, less glamorous, and did not directly serve trafficking victims. However, considering the grant results, it had much wider-scale impact in the community. Additionally, it contributes potentially even more to trafficking victims by preventing trafficking from occurring in the first place. It is important to serve victims, but it is better if people never become victims at all. These are metrics I believe we would have easily seen if we took time to build an incredibly simple quantitative model. These are simple steps that could have widespread impact on grant decision-making and community impact.

CHAPTER THREE

Case Study 2: The R Labs Grant and Results

R Labs Research and Analysis

When our class split into groups at the outset of the 2017 Philanthropy Lab semester, one group focused on education and education readiness. We learned how the city of Waco struggles with systemic issues such as poverty and racism that disadvantage many students' educations (McBride et al. 21). We viewed this as a problem that had widespread and cyclical implications for the city, so we kept a focus on organizations that fostered education and development in Waco.

One organization in which we quickly took interest was Reconstructed Living Labs, or R Labs. At the time of the grant, they were a newly-started 501(c)(3) with a focus on 18-25 year olds in Waco. Their goal was to establish a training program to allow young adults to learn marketable skills and become workers and entrepreneurs in the local economy. R Labs has chapters in 22 other countries, but Waco would be the first United States chapter (Vardeman, Grant Application). We viewed this as a positive solution for Waco youths who had challenges finding employment or further schooling after their secondary education.

R Labs proposed three different grant requests to us at the beginning of the semester. The first was a \$8,000 grant that would help mobile café classes, enabling students to learn how to be employed and build a resumé. Their second proposal was a \$15,000 grant that would fund both the classes and Zlato, a digital currency. The

currency would be compatible with local vendors that R Labs members could gain through community service or working. The final proposal was for a \$35,000 grant that would fund their Grow Leadership Academy, which is a 12-week entrepreneurial program encouraging students how to work in the local community (Vardeman, Grant Application). Because of our budget limitations (since each group had a \$10,000 allocation of the class's total Philanthropy Lab money), we focused on the \$8,000 grant opportunity.

We met with the Executive Director, Monica Vardeman to inquire more about R Labs. It is a unique organization with unique goals, and we wanted to fully understand its role in our community. She shared their plan with us to create a mobile (food-truck style) café where young adults aged 18-25 could learn how to be employed (e.g. working shifts, timeliness, reporting to a boss). Additionally, they could use this experience as a resume booster, allowing them to obtain further employment after their experience (Vardeman, 2017 Interview). This would be the \$8,000 grant that we hoped to fund.

Their mid-term goal was to establish an electronic currency where they could gain points for working or community service, and these points would be spendable at local vendors. The goal was to support the Waco economy through both creating new workers and supporting local businesses (Vardeman, Grant Application). This would be in conjunction with the mobile café classes and would further open the community to the program.

Finally, their long-term goal was to establish the Grow Leadership Academy, or GLA. This is the final step in the program, enabling strong performers in the mobile café classes to continue their education and business acumen. The academy would be a 12-

week program, and their goal was to have their first cohort of 20 students by the summer of 2017. R Labs would bring in staffing from their home chapter in South Africa to run the first academy (Vardeman, Grant Application). We appreciated their long-term vision and desire to both augment young adults' economic opportunities and stimulate the local economy.

Our group decided to not pursue the R Labs grant with our \$10,000 allocation, but pitched it to the entire Philanthropy Lab class as an idea for a collaborative grant between groups. Ultimately, our class decided to support R Labs in their start-up endeavor, and funded the \$8,000 grant to get the mobile café classes up and running. This would be the first step in their two-year plan to full integration into the Waco community. We used a Frumkin logic model with theories of leverage, change, and scale for this grant as well. Our aim was to evaluate the grant to make a wise allocation decision.

Our theory of leverage included both inputs from R Labs and our own grant. We viewed R Labs partnership with South Waco Community Center for a location as a positive step toward establishing their program. They also were partnering with the Methodist Children's Home to get young adults interested in the program. For our own inputs, we listed the \$8,000 grant (McBride et al. 74). Our hope was that this would be a start-up grant that R Labs could leverage to secure more funding. Additionally, we were hopeful for a grant or collaboration between Aramark and R Labs.

The theory of change focused on R Labs' activities, outputs, and outcomes. We focused on their mobile café classes as an activity that would incite local change through building young adults' working skills. Their outputs would then hopefully be skilled workers who were involved in the Waco community. The projected outcome was that

Waco's economic development would include local residents and not leave them out as gentrification and economic growth occurs (McBride et al. 74). We believed all these elements would create positive change in Waco's economic community.

Our theory of scale focused on R Labs' broader impacts. We hoped R Labs would increase the number of employed young adults, which would decrease both unemployment and crime rates by helping them become active working citizens. Additionally, R Labs hoped to foster an entrepreneurial spirit in Waco, building off the successes of the Magnolia Market and other local businesses (McBride et al. 74). Our hope was that our investment in R Labs would further push economic development of the community as a whole.

Creating this logic model enabled our group to further rally around R Labs' mission and purpose. However, as in the UnBound case study, we did not look into R Labs' goals quantitatively, which would have greatly helped our grant allocation process.

R Labs Grant Results

In the spring 2019 grant follow-up process, we reached out to Ms. Vardeman about the progress of R Labs. We first inquired about the number of students that benefitted from the programs set in place. Around 40 students participated in the R Labs classes, but none were currently in the program. There were two quarters of classes held in 2018, each with class sizes of 20. They partnered with McClennan Community College to host the classes and find a location to meet (Vardeman, 2019 Interview). This was significantly fewer class sessions than we anticipated at the outset of the grant, and we had strong concerns that there were no current mobile café classes running.

We also asked about the R Labs' partnerships and their implementation of the

Zlato and GLA programs. However, neither of the new programs were implemented to supplement the mobile café classes. Their recent partnerships included the Cove and Trinity Sports Organization, among others, but their original partnerships with the South Waco Community Center and the Methodist Children’s Home had fallen through (Vardeman, 2019 Interview). This deepened our concerns about R Labs’ current status and why the grant had turned out differently from our original goals.

One positive result we received in the grant evaluation was to learn that R Labs now has two other branches in the U.S. They are both in Texas – one is in Boerne and the other, which is not fully launched, is in Austin. The Philanthropy Lab grant was used in part to bring a team from the home chapter of R Labs in South Africa to teach the Waco team. The Austin and Boerne chapters also came to this meeting, which enabled them to learn for their own locations (Vardeman, 2019 Interview). We were pleased at this positive externality of the grant, but still wanted to learn more about why the results deviated so heavily from our original conversations. To get some more answers, we conducted a site visit to speak with Ms. Vardeman about the future of R Labs Waco.

Through our interview with Ms. Vardeman, we got an even clearer report on the status of R Labs. Though they still had a board of directors, all members were “on hold” while R Labs sought resources. Their biggest current goal is finding a space in which they can operate and hold classes. Their strongest partner, Trinity Sports, was also in search of a facility, so neither organization was able to operate to the extent they would like (Vardeman, 2019 Interview). Ultimately, despite our \$8,000 grant, R Labs was never fully able to get off the ground.

We further questioned R Labs' relationship with their home branch in South Africa. When we gave the grant, it appeared that the Zlato had been developed already and was successful in South Africa. However, the South African chapter has not fully developed this technology, similar in nature to Bitcoin, and thus was unable to share it with R Labs Waco (Vardeman, 2019 Interview). This was another hindrance to the R Labs Waco building out their program, because their next step was contingent on the success of the R Labs South Africa chapter's research and development.

The most tangible impact of this grant was the 40 students in the Waco area. It is the only outcome that has seen fruition to date while other variables are still in the air. However, R Labs has not continued its partnership with MCC because mostly people older than their target demographic were taking the classes (Vardeman, 2019 Interview). The program ran for significantly shorter than we anticipated, so it was concerning to see ended partnerships and lack of resources in conjunction with ending class sessions.

Ms. Vardeman concluded the interview sharing her hope for R Labs. She believed that though it was not overwhelmingly successful to date, that timing would align and allow the organization to flourish in Waco (Vardeman, 2019 Interview). However, there were no concrete action plans on how to move the organization forward in light of the changed circumstances from our grant allocation in spring of 2017.

These grant results show that there were significantly more steps we could have taken as a class to review the R Labs action plan than we did. Ultimately, we created our theories of leverage, scale, and change without assessing the likelihood that R Labs would succeed or not. We asked ourselves about the rewards without also asking about the risks.

Firstly, we made the \$8,000 grant because it would fully fund the first step of their program. We believed that if we could set the program in motion, then the Zlato and GLA programs would naturally follow. However, we did not inquire further into their action steps on how to implement Zlato or GLA, or what their back-up plans might be if they were unable to find funding for the next two programs. This lack of qualitative analysis, foresight, and planning led to exactly the outcome we saw; a program with a start but no steps forward.

Another lack in analysis was where future R Labs funding would originate. One of R Labs' struggles was their lack of funding. However, in conversation with R Labs, we believed that "our philanthropic input is R Labs's first grant, which will act as a necessary catalyst for other grant funding by allowing them to lay down a solid foundation" (McBride et al. 59). We saw the \$8,000 as a foundation, but did not further inquire as to how R Labs would grow that investment and seek further funding. At the time, we believed the rapport of a large investment would be all R Labs needed for continued funding because of the strength of their program.

Additionally, we did not view their lack of funding as a red flag. When we initially met with R Labs, we were told that they only had around \$800 in the bank (Vardeman, 2017 Interview). We viewed their need for money as a problem we could fix, rather than a signal of lacking strength or growth. This was a flaw in our analysis. At the very least, we could have asked where they would apply for other funding or if they had contingent donors lined up if our grant was successful.

In addition, R Labs had no specific plans for revenue streams outside of the implementation of the Mobile Café. This is an area where we could have quickly added

some quantitative analysis into our grant allocation process. The idea was that students would learn how to be employed in a food-truck style café; however, in the start-up, classes were set to occur in South Waco Community Center. We did not ask how long it would be before they moved into a mobile café, when they anticipated revenue streams, or how much revenue they expected from these classes. With these questions, we could have quickly calculated how much capital they needed in the mean-time based on their operating and class costs before revenue streams came in. However, we relied on the good faith of the organization that R Labs had a plan for funding prior to generating its own revenue.

Another question we neglected to probe further was cultural barriers. R Labs curriculum was based on the home South African branch. Though R Labs was successful in 22 other countries, we did not ask if any of these countries were westernized or if they all had similar cultural structures. In our spring 2019 interview, we learned that one of the primary curriculum challenges in the classes was cultural differences, and that R Labs needed to develop new curriculum to be successful (Vardeman). Though this seems to be an obvious difference, we again trusted that R Labs had done its due diligence and was prepared for classes in Texas as soon as we gave our grant.

Again, observations of these analyses are incredibly easy to suggest in retrospect. However, the abundance of un-asked questions shows that our class could have gone further in its analysis to ensure we made wise allocation decisions.

R Labs Learning Outcomes

There are three primary learning outcomes from the R Labs grant results. The first two are similar to the UnBound case study, that more quantitative and qualitative analysis

should be made when considering grant allocations. The third learning outcome is that the Philanthropy Lab Class should heavily consider the risk of a grant in addition to its merits.

The need for further qualitative analysis is clear here, as it was in UnBound's grant results. We understood R Lab's major goals and the value in those goals. They wanted to decrease unemployment rates and stimulate the economy with local workers. However, we did not read between the lines to find the paths to their three major programs that would put this lofty goal into effect. We viewed the endeavor as noble, but did not ensure that they had means of attaining the goals they set. The Frumkin Logic model is very strongly focused on the good possibilities, without turning our eyes to the bad ones. By asking more "how" rather than "what" questions, we might have found a way to help R Labs obtain their goals of implementing the Zlato and GLA programs in Waco. Instead, the organization came to the end of their foreseeable road with the Mobile Café classes that did not turn out as planned.

Additionally, there is a strong need for quantitative analysis in our grant allocation process. We did not assess R Labs' revenue prospects, which led to serious financial setbacks for the organization that we were unable to anticipate. Additionally, we did not ask how many students R Labs anticipated would participate in the Mobile Café classes in their first or second years of operation. These are questions that would allow us to more objectively prioritize investments. There is a fine line over when to choose numbers over passion in philanthropy, but at the very least, numerical analysis would be a beneficial point of view to consider. This might not have changed our decisions, but would have made us more informed grantors.

Finally, our class did not strongly consider the possibility that R Labs would not succeed. In our grant summaries, we wrote, “R Labs will help to decrease crime and homelessness in Waco,” and “this program will help the struggling young adults of Waco” (McBride et al. 59). We stated positive outcomes as definite, and did not qualify the possibility that R Labs would not succeed in this mission. If we had stopped to think about potential grant risks, we might have been more careful in the way we distributed our funds.

I am not suggesting that we would have changed our grant allocation or not given money to R Labs. However, I think we would have made a wiser decision if we had considered the risk inherent to a newly-founded organization. It might not be possible to put a strict percentage on the investment, but had we stopped to think about it, I don’t believe anyone would have given them a 100% chance at success. Knowing there is a chance of failure might have encouraged us to put a matching requirement or have further planning in order to allocate the grant.

Ultimately, it is okay to make high risk investments. The world would not function and innovation would not occur if people were not willing to take risks. However, it is important to understand what type of risks we take on as granters if we want to make wiser philanthropic decisions. If we are aware of the chances of failure, we can take steps to mitigate these risks. R Labs has a great idea on how to help Waco’s community, but we made our grant based on their successful scenario. If we had placed limitations on our grant, such as disclosing further grant requests or matching donations, or establishing revenue plans, then perhaps R Labs would be more financially supported

than it is today. When we don't consider the risks of our decisions, we hurt both ourselves and the organizations we work with.

R Labs was not a necessarily bad grant; it was a risky one. Even had we taken the proper steps to mitigate risk, the Mobile Café classes might not have been successful. However, we would have been aware of this chance and taken every possible measure to avoid failure. For this reason, it is key for students to look at grants qualitatively and quantitatively, and to evaluate the inherent risks of their decisions.

CHAPTER FOUR

Recommendations to Improve the Grant-Making Process

Course Recommendations

The Baylor spring 2017 Philanthropy Lab course was an engaging and comprehensive experience for all students involved. However, there is always room for growth and improvement in the way we view and structure our grant-giving process. Based on the learning outcomes from both the UnBound and R Labs grants, I suggest that the Philanthropy Lab course at Baylor should increase due diligence for potential grants, analyze grantees' funding sources, and clarify or expand impact models and research.

Due Diligence

Based on the conclusions for 2017 class's UnBound grant, I recommend that we increase the qualitative and quantitative due diligence for proposed grants. Firstly, in the way of qualitative due diligence, I simply think there are more questions we could ask. UnBound presented us with a grant for a case management system, and we did not ask if it was the best available, or the most cost efficient. They told us they had researched, and this was the system they chose and were excited about, so we believed them. However, I believe that projects would benefit from further questioning and due diligence.

Our grants were the result of long debates between grant proposals presented to us by different organizations in the Waco community. However, there was not much debate on the efficacy of the individual grants in relation to other projects of the same nature. Nick Cooney writes on how donors should find projects that are the most impactful and

efficient. He writes, “Because the bottom-line goal of improving the world is separate from the process of raising money, non-profits aren’t forced to focus intently on their bottom-line” (Cooney 59). With this in mind, we should focus as donors on the efficacy of the projects and grant requests presented to us, like CaseWorthy.

Though UnBound informed us that they had researched, there are several follow-up questions we could have asked. Very simply, we could have inquired about the overall costs of the system and implementation in relation to other systems, and why it justified a premium price. These are small shifts in the way we view projects, with more specific questions, but they could make a large difference in the long run. Though we might not have changed the decision to invest in CaseWorthy, it would have at least allowed us to consider what other project options might exist and why CaseWorthy was the best option.

In addition to qualitative inquiries, we should conduct further quantitative due diligence on the organizations in whose projects we are investing. We did very little investigation into UnBound’s finances. Outside of the project budget, we did not know much about how UnBound spent its money. Though the UnBound grant led to relatively positive results, this becomes a greater problem with grants like R Labs. In addition to impact models, it would be wise to conduct financial due diligence on the organization as a whole.

One way to conduct financial due diligence is by observing the organization financial statements. One model piloted by Carol Cantwell is the Financial Health Indicators, or FHI tool. This model analyzes five metrics from the IRS form 990, that “are most related to financial long-term health: total revenue, total expenses, unrestricted net assets, temporarily restricted net assets, and public support percentage” (Hafid and

Cantwell 74). This would be a positive model to try in the philanthropy lab class because it is a simple approach that would give the class a broader understanding of the organization as a whole.

While taking a quick analysis of potential grantees' financial statements is not a definitive problem solver, it certainly would give us better insight into the health of the organization outside of simply talking to organization leaders. The FHI tool provides insight to the "reserves," "stability and growth," and "sustainability" of an organization's finances, but does not provide a definitive answer to whether or not we should fund a grant (Hafid and Cantwell 74-75). Rather, it is a tool to help the class observe the overall financial health of an organization so that students may ask better questions in relation to the project and its impact and sustainability. This is one way the Philanthropy Lab class might improve its decisions, avoiding scenarios like the R Labs grant results, without a significant increase in needed class time and research. allocation process.

Analyzing Grantees' Funding Sources

Additionally, one of the major problems with the R Labs was their lack of consistent donors and funding. While we were aware of this situation, we viewed our grant as "a necessary catalyst for other grant funding by allowing [R Labs] to lay down a solid foundation" (McBride et al. 59). So we certainly knew that R Labs lacked the necessary funding to continue their project without our class's help. Nevertheless, analyzing funding sources would have enabled us to have a broader understanding of how this factor affects the organizations we considered for grants. While this might not have definitively swayed us away from a financially failing grant, it at the very least

could have opened our eyes to the implications of the decision we were making and the risk involved.

One aspect of the organizations to consider is the variety of funding sources and their correlation with each other. Themudo compares nonprofit investments to public investments by relating risk of funding sources to market betas. Thus, more “procyclical” funding sources like the government give these nonprofits higher beta risks. However, he finds that corporate giving and volunteering is less correlated with overall market strength. He writes, “greater dependence on commercial revenue and volunteering, therefore, should reduce nonprofit vulnerability to systematic risk from macroeconomic volatility” (Themudo 46). This is perhaps a more precise view than the time frame of the class may merit; however, it draws attention to the idea that we should consider both where funding sources are coming from and if those sources are correlated with each other. In any of our grants, both successful and unsuccessful, it would have been a more informed decision had we briefly analyzed the funding sources of the prospective organizations.

Again, our class had full knowledge that R Labs had no major funding sources other than our grant. Looking at potential grantees’ information may not change the class’s decisions on certain grants. Nonetheless, I believe our class made less informed grant decisions because questions like these were not at the forefront of our minds. Knowing funding sources may not change a final decision, nor should it if the project is strong enough; however, researching funding sources raises questions to ensure that the class understands the risk it is taking on with its grants.

In addition to analyzing the variety of funding sources, the class might consider the financial strength of the organizations' primary donors. This might not apply to every grant, but would make a big difference in situations like our UnBound Grant. UnBound's budget is strongly dependent upon Antioch Church (Garnett, Grant Application). In situations like this, we might consider checking the financial stability of the primary funding organizations as well. In line with this, the Financial Health Indicator model listed above also accounts for financial sponsor health. When potential grantees are dependent on another organization, "the FHI then includes a rating for the fiscal sponsor as well as for the project. This insures that the sponsor's financial health will not become a factor that negatively affects the project" (Hafid and Cantwell 75). So by analyzing the same metrics for both the organization and its sponsoring organizations, we could lessen the risk of funding problems. While UnBound's budget ties to Antioch did not affect the grant negatively, this is still a key item to check when considering grants to ensure the financial stability of the projects the class is funding. allocation process.

Expanding Impact Models

Our class's goal was to maximize the impact in our community with the limited philanthropic donation we had. I believe one of our biggest failures in impact maximization was the R Labs grant. This is not to say that the R Labs grant had no value. The R Labs grant provided two classes for students through McLennan Community College. It also provided for Waco and two other Texas chapters of R Labs to learn from the R Labs South Africa team (Vardeman, 2019 Interview). However, these results were not in the range of expectations our class had set in conversation with R Labs. This is largely in part because we did not account for the risk of the grant at the time we made it.

As noted in the case studies, the spring 2017 Philanthropy Lab class heavily considered implications of grants through the Frumkin logic models. However, in these models, we did not consider downside risk of our grants. Brest, Harvey, and Low consider this problem by likening philanthropic investments to public investments with the concept of expected return. They utilize the following formula: “Expected Return = (Outcome x Probability of the Outcome x Philanthropic Contribution)/Cost.” (Brest et al. 52). This model is a very simplistic way the philanthropy class could attempt to measure outcomes of the grants while accounting for risk. It maintains elements of the Frumkin model, such as outcomes and philanthropic contributions, while also providing quantitative analysis and adjusting for risk. While these measurements would hardly be perfect, drawing attention to the idea of probability would have been critical in helping our class make an informed decision about R Labs.

For example, outcome could be quantified through one class of potential salaries of R Labs students. Probability could be estimated at a standard fifty percent. Philanthropic contribution could be around forty percent, because the class would contribute significantly to R Labs success as a primary donor, but R Labs would ultimately play a more significant role than the class’s donation in helping youths become employed. Finally, cost could be estimated with the class’s grant inputs. Immediately, despite the impreciseness of the model, students are required to think about broader impact and risk of their grant decisions.

Again, there is no reason to believe that the class’s guess about the success of the R Labs or UnBound grants would be correct. However, the exercise would encourage students to better examine the risks and rewards of the grants’ impacts. In regards to their

statistical model, the Brest and his co-authors state, “In the end, expected return analysis is not a substitute for intuition, but rather a structure for testing one’s intuitions about what strategies are likely to work” (56). Encouraging Baylor’s philanthropy classes to pursue deeper thought about both potential upsides and downsides of grants could further insulate them from risk of failed grant outcomes.

Industry Metrics and Research

Another reason for the lesser successes of the R Labs branch is because we failed to compare them to similar nonprofits. One way we could easily begin to analyze our grants is to compare how effectively these grants are using funds in relation to their peers. One analogy compares philanthropic donations to cans of soda. One would not pay for “a \$700 bottle, or a \$20 bottle – when a perfectly good \$1.50 bottle of Pepsi is sitting right next to it on the shelf” (Cooney 90). While this is a very simple example, it is certainly a premise we should consider in our philanthropic donations. Our aim should not only be to make “good” grants, but to make grants that are effective and efficient in resource allocation.

This applies to our reasoning with the R Labs grant. Our class was compelled by the innovation of the R Labs grant, but we did not ask how effectively they would be using the money. Our stated goal of the grant was to decrease Waco young adult unemployment (McBride, et al. 59). However, our class did not conduct any research on unemployment. This is largely in part due to the fact that each class has limited time. We began the semester with overarching research to inform ourselves about the nature of certain “wicked problems” in society. We then used this knowledge to inform our decisions as we began to narrow our grant choices. However, we never returned to a

research phase to see if our decisions were in line with other nonprofits in their field. Because unemployment was not one of the initial umbrella problems we researched, we did not make the most informed decisions we could have made about solving unemployment with our grant money.

Though time is limited, perhaps in the narrowing process, the class members could conduct less expansive, but more specified research. We did not have time to spend the entire class on research because it limits site-visit, interview, and decision deliberating time. However, perhaps decreasing the broad stage research and increasing issue-specific research after a slight narrowing of projects occurs. This could include industry metrics or project models to see if the proposed grant aligned with standards.

One specific metric to consider that could be compatible with any industry is distilling impact into individual units. Obviously it would be challenging to compare different units (i.e. medical nonprofit impact versus humanities). However, within a given industry, this would be an incredibly useful metric. Cooney refers to them as “cost-pers.” He uses the example of hunger relief charities, and cost per person fed. Cooney argues when we analyze cost per unit for organizations, they are incentivized to improve their efficiencies. He writes that when we give this way, charities “would know that, if they wanted to keep their donors . . . they would need to have a cost per person spared from hunger that was lower than or at least competitive with the other charities in the field” (Cooney 94). Thus, if we can try to find industry metrics or distilled “cost-pers,” we can make wiser decisions in the Philanthropy Lab class.

In the case of R Labs, we could have compared our investment into R Labs, and the potential number of people reached in phase one, to the cost of job-skill building

classes in other cities or states with established programs, adjusting for price variances by state. This would not have been a perfect comparison, but would have given us an idea about if we were making a wise investment. By making a comparative study, we will not eliminate the risk of ineffective grants. However, it ensures that we have a measuring stick by which we may consider the grants we make. Because R Labs was a start-up organization, these costs would likely have been estimates, but it would have given us a place to start.

Conclusion

This paper is not to suggest that the Philanthropy Lab 2017 spring semester was unsuccessful. The grant results as a whole were incredibly successful. After conducting grant follow-up with all organizations, a student survey showed that our class would feel comfortable making ten of those twelve grants again (Castillo and McBride). The aim of this paper was not to diminish the works of the class, but to decrease the probability of bad outcomes in our philanthropic efforts so that money can be used to service the community in the best way possible. For this reason, though the 2017 spring semester of grants was overwhelmingly positive, there are still many steps forward we can take in the quantitative analysis of grants to further avoid negative outcomes.

The 2017 Philanthropy Lab class's grants experienced both positive and negative grant outcomes, sometimes even within a single organization's projects. This pattern will continue, regardless of the amount of quantitative analysis the class may begin to incorporate into its patterns. However, I believe the class has the power to reduce the severity and frequency of negative outcomes with more quantitative analysis. Through increasing project due diligence, analyzing funding sources and stability, expanding

impact models, and furthering organizational research, the Philanthropy course at Baylor can widely expand students' decision-making ability. In the noble pursuit of bettering society, I hope we can learn from past mistakes and continue to hone the class's ability to effectively and positively impact the community.

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