GiveWell strategy review - August 2017

Summary

GiveWell's mission is to find and support the development of outstanding giving opportunities and publish the full details of our analysis to help donors decide where to give.

We assess our impact by (a) the quality of the recommendations we make and (b) the amount of funding we direct to our recommendations.

GiveWell's work has three main components:

1. Research: aimed at identifying outstanding giving opportunities and publishing our reasoning
2. Outreach: aimed at increasing the amount of money that goes to our recommendations
3. Operations: aimed at supporting the above two goals via donation processing, HR, finance and accounting, office management and legal.

Below, this document discusses our top priorities in each domain in details. Here, we briefly summarize:

Research

Our research team is in good shape. Our team is able to effectively research and publish reports on the giving opportunities we want to consider. There are problems we need to fix but the team has the capacity to make the necessary changes. Adding additional capacity to the research team would allow us to move faster / do more, but it wouldn't change the types of research we're able to do.

Outreach

We put limited capacity into outreach historically, and it has significant room for improvement.

The consistency of our outreach to major donors has improved significantly since we hired Catherine Hollander (our only staff member dedicated to outreach), but she's capacity constrained: we don't reach out to as many donors as we ideally would.

In addition, we have historically put limited effort into proactively increasing the amount of funding we direct to our top charities. We see a major potential opportunity to increase our money moved with a thoughtful strategy.

Developing a promising strategy for outreach that increases our money moved as much as possible is a top organizational priority.

Operations

We're in the process of building an operations team led by Sarah Ward (Director of Operations). We still have room for improvement but the team effectively executes all its day-to-day responsibilities, and if it continues on its current trajectory, will be significantly improved in the near future.

Current Vision and Mission Statements

Mission: GiveWell finds and supports the development of outstanding giving opportunities and publishes the full details of our analysis to help donors decide where to give.

Vision: a world in which donors reward charities for effectiveness in improving lives.

How aligned is current state and current operations to these statements? If not well aligned, do they need review? Do priorities need to be realigned?

With a small edit, the mission statement reflects what we're doing.

The vision seems fine.

Executive Leadership

Name Elie’s Top 3 priorities/investment areas with goals/metrics and relative priority of each

These are listed in order of priority:

1. Maximize the long term impact of staff, especially my reports.
    a. For my reports (Natalie, Josh, Sarah and Catherine):
        i. Do this via coaching, assessment, mentorship, training focusing both in their project work and contributions and leadership/management development.
        ii. This includes working with them to set priorities and goals for them and their teams (when applicable) and checking in to ensure their actions are consistent with agreed upon goals.
        iii. The goals / metrics varies by each person, so we should discuss what sorts of goals/metrics would be most useful. At a high level, in most cases, my goal is to expand the scope of what each person can do while limiting the time I spend.
    b. For the rest of staff:
        i. Set culture and key improvements in culture/work environment. My assessment is that there are aspects of our culture/work environment we should work to resolve, but that a relatively low intensity effort (i.e., being aware of and diligent about improvements) will likely yield sufficient results.
        ii. We recently retained a consultant to conduct interviews with all staff to identify problems. That project led us to settle on two major improvements we intend to aim to improve on. They are:
            1. Responding to ideas and critiques. A core value of GiveWell's is that we make decisions based on reason, logic, and evidence. It's

clear from the feedback that staff perceive some decisions as being made suboptimally, with a bias towards the status quo and away from new ideas.
2. Performance feedback. The way in which management, myself included, has communicated with many on staff about your performance and trajectory has caused confusion, anxiety, uncertainty, and lack of motivation.
    iii. We don't believe we can easily track this quantitatively. Instead, we plan to qualitatively track this via:
        1. Elie's meetings 1:1 with all staff. (I meet with everyone at GiveWell at least 1x/quarter.)
        2. Managers' 1:1s with direct reports. (Managers have 1:1s with reports 1x/week.)
        3. Incorporating questions about the above into exit interviews
        4. Running a similar process to interview staff about problems next year (~April 2018) to see whether we have made progress
    c. Recruiting - low level since other staff lead most proactive efforts, but keep an eye out for great people/other vendors we might be able to retain. This may become a higher priority if/when we aim to hire more senior staff (most likely in outreach).
2. Decisions I make and/or work I do directly (e.g., weigh in on research conclusions, IDinsight relationship, GIG investigations, recruiting plans and decisions)
    a. I still spend a significant time leading research projects or weighing in on decisions that aren't explicitly targeted at developing staff.
    b. My goal here is to reduce the amount of time I spend on this bucket by working on priority #1 above.
3. Develop a plan and lead long-term project to increase GW money moved
    a. We have a long-term goal of substantially increasing our money moved. We're aiming to develop a more concrete plan for how we intend to accomplish this by the end of the 3rd quarter of 2017.
    b. Metrics:
        i. Short-term: do we have a solid plan by the end of 3Q 2017
        ii. Long-term: does money moved reach $100m, ex-Good Ventures by giving season 2022.

Very roughly speaking, I'd guess that, over the past 6 months, priority #1 above has accounted for 60%, #2 30% of my time/attention, and #3 10% of my attention but I expect that #3 will increase substantially over the next 6 months.

Discuss relative priority/investment in each of three major domains (research, operations, and outreach)

In the first half of 2017, I spent ~60% of my GiveWell time on research, 20% on operations and 20% on outreach. (I spent 88% of my work hours on GiveWell and 12% on Open Philanthropy.)

I allocated the most time to research because it has historically been our top organizational priority, and my contributions have been necessary to move it forward as effectively as possible.

I expect that I'll devote more of my capacity to outreach in the future and continue to delegate as much research ownership as possible to Josh and Natalie so that I can focus on outreach. I expect that my research hours fall and my outreach hours rise in the 2nd half of the year.

I don't think I'll allocate more time and attention to operations. Sarah Ward is running that team and I think that that team will be successful without significantly more engagement from me; as Sarah gets more experience, I expect the time I spend on operations to fall.

<u>Why does this shift make sense?</u>

Our research is our product, so it has to remain high quality. I also suspect, based to some extent on intuition and to some extent on my subjective impression of donors' reactions to our research between 2013 and 2015 when we didn't produce a large amount of new research, that our research has to continue to improve and push new frontiers to maintain donors' belief that GiveWell represents the gold standard for recommendations to donors.

Over the past 18 months, a few things have changed:

1. Our research capacity has increased substantially as we've added some new staff and existing staff have matured. Excluding me, our research staff is able to cover a lot of ground and continue to push our research to explore new areas.
2. The room for more funding among our recommendations has surpassed our money moved. Several years ago, we estimated moderate room for more funding among our top charities, and we worried about the possibility of finding new charities with additional room for more funding. This has changed. Our estimated room for more funding at our top charities exceeded our money moved by more than $100 million last year, excluding GiveDirectly. In addition, GiveWell Incubation Grants are starting to generate larger giving opportunities, and we've heard from top charities that some are nervous about our total funding capacity.
3. Good Ventures is unlikely to give much more than $60 million to our recommendations in the near future. Previously, it seemed plausible that Good Ventures would decide to give substantially more to our recommendations.

At the same time, we have made some progress on outreach by hiring Catherine, and our relations with existing donors are in good shape. However, we have made virtually no effort raise additional funding. I don't think we currently have the capacity on staff to sufficiently push outreach forward, which requires determining our strategy and deciding who to hire, unless I focus on it.

Research

Name top 3 goals/metrics in research

These are our four top priorities, in order of importance:

1. Maintain our current product: follow and stay up-to-date on current top charities, standouts and interventions; assess new charities and interventions that appear to be promising based on our current criteria and assessment of interventions; release new recommendations annually; maintain quality standards for research.
    a. Priority/time allocation: This is our core product offering (i.e., our annual release of new top charities). We have worked hard to limit the amount of work that goes into this to the minimum necessary. Currently, this work is led by Natalie (accounting for ~50% of her time). Natalie manages a team of 4 people, and I'd roughly estimate that 2/3 of their time is devoted to this goal. In addition, Josh spends a small amount of time (~10%) on intervention updates.
    b. Metrics:
        i. Do we stay up-to-date on our top charities and interventions and release a high-quality update before December 1st?
        ii. How many new charities do we assess?
        iii. How many promising interventions do we complete thorough reviews of?
        iv. How much capacity/time does it take to accomplish this goal, especially focused on updating our views on top charities and top charities' interventions?
2. Intervention prioritization: There are many interventions we haven't sufficiently assessed to have compelling reasons to not prioritize. This work aims to more systematically follow and assess interventions that could lead to top charities.
    a. Metrics:
        i. How many new interventions do we assess at a shallow and medium level?
        ii. How promising do these interventions appear to be as measured by (a) estimated cost-effectiveness and (b) plausibility as GiveWell top charities?
        iii. Does this work lead to new top charities or new Incubation Grants?
3. Build for the future: work we do today that won't lead to significant impacts in the next 1-2 years but we expect to have longer-term benefits. This is mostly (a) ongoing recruiting efforts and (b) work on GiveWell Incubation Grants.
    a. Metrics:
        i. Do our recruiting efforts lead to hires that contribute significantly to GiveWell's research?
            1. [Redaction]
        ii. Do our Incubation Grants lead to new top charities?
        iii. Do our grants lead to high quality public evidence on promising interventions (whether or not they turn into top charities)?

4. Improve the robustness of our tools (e.g., our cost-effectiveness model): our decisions are a function of the data we have and the tools we use to analyze that data. Flaws in those tools can lead us to make poor decisions. This work aims to improve the reliability of the tools we use.
    a. Metrics:
        i. Do we successfully address and reduce the number of major problems/weaknesses we see in our tools? How many problems do we address?

Discuss why you believe in this relative priority (facts, experience, external input)

- Why is #1 prioritized most highly?
    - Intuitively, it's compelling to me that GiveWell should be wary of letting the quality and scope of its research product degrade given that we've been successful with this product and we're not allocating an undue amount of capacity to it.
    - Conversations with major donors often focus on (a) updates on our top charities and (b) information about new top charities we're actively considering. These two topics are the ones that major donors ask about most often. My impression from those conversations is that they expect us to have a good understanding of those organizations and what they're doing.
        - When we had no new top charities in 2014 and 2015, it seemed as if donors and followers closest to us were skeptical of the value of our ongoing work. New top charities (especially Malaria Consortium, implementing a new intervention) helped to address these concerns.
- Why is intervention prioritization prioritized 2nd?
    - In our experience, the decisive factor in our charity recommendation is the evidence base and cost-effectiveness of interventions. We've consistently had the experience that intervention results (strength of evidence and cost-effectiveness) drive our final conclusions significantly more than organizational factors do (see this post discussing GiveDirectly vs SCI as an example). We therefore believe that assessing interventions is key to identifying charities that we'll ultimately decide are as good as or better than our top charities.
    - We view this as a high priority because we know that are numerous interventions in addition to large areas (such as education or agriculture) that we haven't recently assessed. I'd guess that the domains we haven't investigated (both specific interventions and larger domains like education and agriculture) in depth represent some of the most likely areas where we'll find new priority programs as promising or more promising than our top charities.
    - There will come a point where we complete this work and can lower its priority. In the next 12-24 months, I expect we'll make substantial progress on this work and have a much better sense for whether we should continue this work or change/stop it. My best guess is that this will move to a much lower priority within the next two years (most likely subsumed under the goal above taking significantly less capacity).
- Why is GIG/building for the future prioritized 3rd?

    - GIG
        - Over the past few years, we've struggled to find new top charities that are as promising as or more promising than our current top charities. Notwithstanding the bullet above about intervention prioritization, I'd guess that we've done a fairly good job identifying the low hanging fruit in GiveWell's first 10 years. GIG -- directly supporting the development of new top charities -- offers an opportunity to grow this pool directly.
        - Deciding how much capacity to direct to GIG has been challenging. Over the past 18 months, I've devoted a significant amount of my time to building the program. I've also tasked other staff members -- Natalie, Josh, and Sophie, in particular -- who've all played significant roles. I now believe the program is operating well in that (a) we have grants/ongoing projects that cover the full scope of the GIG pipeline (impact evaluation/research, seed funding, and M&E support) and (b) important potential partners (JPAL, IPA, CHAI, CEGA, Guide at Georgetown, GIF, DIV, IDinsight, Evidence Action, the EA community) are aware of and reach out to us about potential grant opportunities, but (c) we have little information/reason to believe that the bets we've made (bets that specific grants will lead to new top charities) will succeed. I'm hesitant to invest more -- funding or capacity -- in this area until we have a better sense of how well our bets will work out. (We expect the first concrete evaluation of this strategy to come the fall of 2017 when we evaluate No Lean Season, an early GIG grantee for a top charity recommendation).
        - We're currently allocating time to GIG to maintain our current set of priorities and we're opportunistically considering additional grants if/when they seem particularly promising relative to our current portfolio, but we're not proactively trying to grow the portfolio.
    - With recruitment, we have slowly built our research team and don't see pressing concrete gaps to fill.
        - It's possible that we'll want to add additional specialists to evaluate literature, but we're in the process of evaluating / will be in the process of evaluating two this fall (Caitlin and Stephan), and I'd like to get a better sense of their capabilities before hiring more.
        - Otherwise, we're aiming to try to add other people who are similar to research staff who've been most successful in the past, i.e., values-aligned, technical people who have some work experience. We don't currently see other gaps we think we could/should realistically try to fill.
- Improving tools such as our cost-effectiveness model
    - This is prioritized last because, based on past experience of (a) reanalyzing our tools or (b) donors scrutinizing our tools, I think it's likely that GiveWell would be OK -- survive/continue to thrive -- even if our tools remain suboptimal for the next couple of years. That's because we haven't historically fundamentally changed our conclusions based on reassessing our tools and donors have rarely been disappointed by the quality of our research.

- Nonetheless, I think a crucial part of our past success -- both consistently improving the quality of our research and analysis and showing donors that our research is high quality -- has been due to offering the highest quality research we can.
- Given that we see important gaps in the quality of our tools, we want to work to improve them. I'm worried about the long-term success of a GiveWell that actively ignores known, obvious weaknesses in its methods.

Discuss what it would take to change your perspective

Below, I'm going to list a bunch of things we could do differently and then follow it up with what would cause me to change my mind about each.

<u>Things we could do differently on research:</u>

1. More work on GIG via more networking/searching for grant opportunities and allocating more of the funding we influence to GIG. One easy type of grant we could make more of would be supporting the developing of high quality M&E systems for charities who might be recommended if they had that.
2. Deepen our knowledge about top charities via more closely following them and more site visits
3. New approaches to serve other donors: we could focus our research on trying to bring in more donors researching and writing about causes / topics that we think will get us attention (e.g., disaster relief)
4. Intellectual home of giving blog: when Holden was blogging regularly, the GiveWell blog was a place where we published posts about philosophy/theory of giving. With Holden's move to Open Philanthropy, we've stopped this.
5. Be helpful to billionaires/foundations: we could pivot and take a more consultant-like approach to understanding what UHNW donors want and trying to give that to them
6. A subset of this sort of work would be focusing research that might be useful in influencing bilaterals. Some specific possibilities: evaluations of major recipients of bilateral funding (the Global Fund, GAVI, UNICEF); evaluations of elimination vs control campaigns for malaria or NTDs.
7. Change approach and try to evaluate more charities more shallowly: we could go back to our original vision and try to create a menu of charities that we evaluate at a shallow level.
8. Focus evaluation on charities instead of interventions: we could go back to what GiveWell did c. 2009-2011 and focus more of our energy on finding, talking to, and evaluating charities independent of the independent evidence for the effectiveness/cost-effectiveness of their intervention
9. Make GW research smaller: we could scale down our staff and focus research primarily on goal #1 above -- maintain our traditional top charities product.

What would cause me to prioritize X more highly than we currently are:

1. There are two major reasons I don't want to prioritize GIG more highly right now: (a) we've taken a handful of bets on various incubation grants, and I'd like to see whether our hit rate is high enough to justify increased investment and (b) I'm optimistic that non-GIG efforts (i.e., intervention prioritization and continuing to solicit applications from the most promising charities we can find) will create new top charities. Either factor could change and that would cause me to reassess GIG's priority.
2. If we made a major error in our assessment of a charity or if we heard donors pushing back that we hadn't gone deep enough, I'd consider this. For now, my impression is that we've historically gone deeper than necessary, and we're trying to tack in the other direction.
3. For all research priorities where the goal is "raise money" rather than "find the best opportunities possible," there are three things that could affect prioritization: (a) we could meet a major donor where the benefit of engagement is worth reprioritization (e.g., another Good Ventures-sized donor would make me seriously consider changing research priorities), (b) we fail to raise money through other approaches to outreach and using our research capacity seems like the most promising path, or (c) we believe that our research capacity is unlikely to make meaningful progress on finding better giving opportunities so it's worth allocating it to the goal of increasing our money moved.
4. See above.
5. See above.
6. The above is true though, in this case, my instinct is that using research capacity is more likely. Amanda Glassman at CGD thinks we should take this approach; conversations I've had with DFID have often led to their asking us to provide follow up that utilizes research capacity (minimal to date).
7. This seems very unlikely. I'm skeptical we can do this well (i.e., complete shallow investigations that reach useful conclusions) and I'd bet that this wouldn't be useful to many donor dollars based on our past experience with a GiveWell charities menu and what I've heard from donors over the years about what they value in our research. If I believed that a significant amount of funding truly wanted this and I could see the path to doing this successfully, I'd revisit.
8. Recent interactions with charities that we've reached out to implies that the M&E data most charities have is similar to what they had in the 2009-11 period, so this approach wouldn't likely yield more top charities. If charities came to us with compelling impact evaluation data, I'd change my mind.
9. We'd do this if the above didn't seem to be working.

Discuss ways you would receive input required to change your perspective

- The priority of GIG will most likely change based on the success/failure of our past grants and our ongoing success with finding new top charities in other ways. I expect that we're going to have to let time pass to decide whether or not we should change its relative priority.

- Deciding to go deeper on charities would come in reaction to a problem. I feel good about the level at which we're monitoring charities, and I could imagine discovering a problem that causes us to want to invest more heavily in this priority. We speak to donors regularly and we'd know if our major donors had concerns about the level of depth/intensity of our reviews. So a change here would most likely be reactive to problems or donor complaints.
    - The most likely ways we'd learn about problems would be (a) our own ongoing follow up identifies something we missed before, (b) donors ask us questions about a charity that we can't answer but seem important; that, itself, might convince us we made a mistake in not assessing a charity more deeply before; it's also possible investigation driven by a donor's question causes us to find a problem; or (c) some external reporting (media or academic research) informs us about a problem.
- Re: 4-6: we're in the process of developing our outreach strategy; we're also having conversations with people about how we might approach our project of influencing bilaterals. This is an active area of investigation where we're talking to people with varied experience: fundraising, marketing, media, work with/in bilaterals and those conversations could change our prioritization of work within outreach. My preference is to focus on outreach efforts that don't require a major shift in our research, but if other approaches to outreach fail or if these seem like the most promising approaches for outreach, we'd revisit.
- I'm not planning proactive steps to reassess 7-9.

Operations

Name top 3 goals/metrics in operations

1. Maintain quality of our work across operations' key domains: donations processing, finance & accounting, office management (including IT and reception), HR, legal, and website.
    a. Metrics: Quantitative metrics are of limited value here, but they include things like:
        i. HR: are we completing all onboarding steps on a similar timeline / to similar degree as we were in 2016?
        ii. Donations: the donations team has some specific quantitative metrics for things like turnaround time to respond to donor questions.
        iii. IT: no significant internet downtime.
        iv. Websites: similar levels of downtime (very low) for maintenance; similar lag time on publishing content etc.
2. Build a team that has the appropriate capacity and expertise to maintain and improve our work across our domains while maintaining good work/life balance for all team members

a. Leverage operations staff: Similar to Elie's first goal, a key priority for me is to maximize the long term impact of operations staff, especially my reports. I'm planning to take a similar approach to Elie to accomplish this, and to measure success at a high level by expanding the scope of what each person can do while limiting the time I spend.
b. Hire new staff: In addition, we're actively recruiting a Controller, which will allow us to consolidate all finance & accounting work under one person and reduce the burden of that work on Sarah, other ops team members (who we'd like to have focus on other work), and Natalie (who still works on the budget, grant reconciliation, and metrics).
    i. After we onboard the Controller, we plan to assess the team's capacity and expertise to determine whether additional hiring is necessary.
c. Metrics:
    i. Onboard Controller by September 2017?
    ii. Eliminate the need to rely on non-ops staff for ops work (possibly with one or two small exceptions, including research support management?) by early 2018?
    iii. Maintain the quality of operations work and make significant progress on improvements without ops staff working more than they can/want between now and mid-2018?

3. Implement significant improvements to operations and build for the future
    a. We plan to make improvements across all of the key ops domains, to varying degrees. Short-term projects we plan to accomplish in H2 2017 are described in the Operations H2 2017 Vision and Plan [LINK REMOVED]. That plan also includes lower priority projects that we plan to tackle in 2018 (or sooner, depending on how much progress we make in 2017).
    b. Metrics: Vary from domain to domain. High level goals for each domain (roughly in order of priority; timeline to make significant progress varies depending on priority, but we'd like to accomplish the bulk of this work by the end of 2018):
        i. Technical work: Address highest-priority technical problems, largely in donations tech. This work overlaps with / is essential for improvements we want to make in other domains.
            1. Highest priority improvement project in this domain: implement a better data integration system between our credit card processor (Braintree) and CRM (Salesforce) by early 2018.
            2. We have some assessment work to do before we prioritize and start the other potential projects we could do in this area. This is on hold until we hire a Controller, because the staff member who will be responsible for this is handling some finance work in the interim. We plan to prioritize these projects by the end of 2017.
        ii. Finance & accounting: Reduce reliance on manual processes so that this work takes staff less time and costs us less money relative to donation volume (e.g., monthly close, grant reconciliation, updating the budget,

audit). Improve and transition to different systems and processes so we're equipped to scale as donors/donations grow.

1. Projects are detailed here [LINK REMOVED].

iii. Donations processing: Improve systems and processes to reduce reliance on manual processes, reduce room for error, and maintain or improve the donor experience as the number of donors and donations grow.
    1. If we decide to switch to a new system for managing donor communications, implement new system before giving season 2017 or, if that isn't possible due to other priorities and lack of in-house expertise, by mid-2018.
    2. Other projects we plan to prioritize next are listed here [LINK REMOVED].

iv. HR: Improve essential areas (essential = onboarding, offboarding, benefits administration). E.g., onboarding needs to be streamlined and reviewed for things that we can make smoother for new staff. Improve areas outside of essential HR functions, including, e.g., offering staff more frequent meetings with someone outside of their management chain.

v. Other tech: improve data security, separate GiveWell and Open Phil systems, website improvements necessary for outreach work.

vi. Recruiting / retention: diversity & inclusion

vii. Legal / risk management: update miscellaneous outdated policies, improve governance procedures, etc.

Discuss why you believe in this relative priority (facts, experience, external input)

Operations is generally performing its essential functions without major problems, but it's not functioning optimally.

Building a team with appropriate capacity and expertise will allow us to continue maintaining ops (priority #1) and set us up to make improvements and build for the future (priority #2). This goal is also critical for retention – people will leave if we're asking them to do too much on an ongoing basis, and/or if we're constantly asking people to perform tasks outside of their abilities and interests. We based the decision to hire a Controller on input from contacts at other organizations (Room to Read, Donors Choose, New Profit) and from our outsourced accounting firm, BPM. We think several factors make this the right time to hire someone with accounting experience to lead this work: donations volume, number of payment platforms we use, our grantmaking practices (numerous grants/year, including to international entities), increases in number of employee expenses and AP payments.

Once we've strengthened operations through a combination of goals 1 and 2, there are several areas within operations that could be improved. Whether or not it's worth it to do all of the projects we could depends partly on whether or not our donations volume grows and we invest in outreach, because we could maintain things as they stand today without making many improvements. Some improvements are probably worthwhile either way (e.g., reducing some of our reliance on manual processes to save staff time and reduce room for error). Others won't be necessary if we don't invest in outreach and/or start to see significant growth in the number of donations we're processing (e.g., website improvements related to SEO, additional donations processing improvements beyond the lowest hanging fruit).

Discuss what it would take to change your perspective

I folded this into my previous answer. I could try to separate these out if that seems helpful.

Discuss ways you would receive input required to change your perspective

I'm unsure how to answer this in a way that's useful. Obviously, if the things I'm assuming above don't play out as I expect, then I'd change my perspective, but that doesn't seem useful.

Outreach

Name top 3 goals/metrics in Outreach

1. Increase our long-term (i.e., 5-10 years from now) money moved as much as possible
2. To accomplish this goal, set the plan/structure for our outreach work going forward: i.e., what approaches/segments should we focus on? How should we structure GiveWell to increase the impact this work has?

<u>Metrics</u>

1. What is our average money moved 5-10 years from now?
2. Do we have a compelling plan/strategy for outreach 12 months from now?

Discuss why you believe in this relative priority (facts, experience, external input)

This prioritization is aimed at increasing our long-term money moved. I'm happy to discuss why I think money moved is the right goal at the expense of other possible goals such as (a) maximizing the number of donors who use our research or (b) trying to increase philanthropy's/donors' focus in general towards metrics and rigorous evaluation.

Discuss what it would take to change your perspective

This framework may not work well in this case since we're explicitly in a phase of exploration and assessment. We're actively trying to assess what path we should take with outreach, so in each of our high-potential approaches we're talking to advisors/external parties that may be helpful and trying to take opportunities to experiment with possibilities in the hopes of learning more about the potential impacts of various types of work.

As part of developing this strategy, we'll have to figure out what sort of team/budget we want outreach to have. In addition to the possibility of fundraising to increase our budget, we have significant funding on hand as a result of the split with Open Phil.

Discuss ways you would receive the input to change your perspective

I'm actively talking to people aiming to clarify my perspective. I expect it will evolve substantially in the coming months.

Concretely:

- Aid Agencies - I've talked to people at USAID, DFID, CGD, Evidence Action, GiveDirectly, Michael Anderson (former head of CIFF), Ann Mei Cheng (former head of the Lab at USAID), and staff/former staff of CHAI and GAVI
- Media - I talked to YCombinator and at their recommendation we hired Big Swing Communications (the PR firm that works with YC companies).
- General marketing - have talked to YC, a donor of ours who works in management consulting and the people who led growth at Quora and Dropbox.
- HNW donors - have not done very much of this yet. Have largely talked to Chuck Slaughter of Living Goods.