



Faculty of Design

2015

## A case study on systems change in the charitable sector

Rotstein, Gena

---

### Suggested citation:

Rotstein, Gena (2015) A case study on systems change in the charitable sector. In: Relating Systems Thinking and Design (RSD4) 2015 Symposium, 1-3 Sep 2015, Banff, Canada. Available at <http://openresearch.ocadu.ca/id/eprint/2036/>

*Open Research is a publicly accessible, curated repository for the preservation and dissemination of scholarly and creative output of the OCAD University community. Material in Open Research is open access and made available via the consent of the author and/or rights holder on a non-exclusive basis.*

*The OCAD University Library is committed to accessibility as outlined in the [Ontario Human Rights Code](#) and the [Accessibility for Ontarians with Disabilities Act \(AODA\)](#) and is working to improve accessibility of the Open Research Repository collection. If you require an accessible version of a repository item contact us at [repository@ocadu.ca](mailto:repository@ocadu.ca).*



# The System of Giving

Relating Systems Thinking and Design within the charitable sector



Gena Rotstein, CEO &  
Advisor in Philanthropy  
[grotstein@dexterityventures.com](mailto:grotstein@dexterityventures.com)

[www.dexterityventures.com](http://www.dexterityventures.com)  
[www.place2give.com](http://www.place2give.com)



## System #1 – Family, Tribe, Community



# What is systems thinking and design?

- *“Systems thinking is a way of thinking about, and a language for describing and understanding, the forces and interrelationships that shape the behavior of systems. This discipline helps us to see how to change systems more effectively, and to act more in tune with the natural processes of the natural and economic world.” Peter Senge, The Fifth Discipline Field Book*
- *“System configuration that meets an identified or required set of requirements.”  
<http://www.businessdictionary.com/definition/system-design.html#ixzz3ivbZz0Cn>*



# The Systems

## About DVI

- can measure social change,
- use big data, and
- map the emotional experience of charitable giving

## Systems

- Charities & Non-Profit System
- Financial system
- Needs of the Community

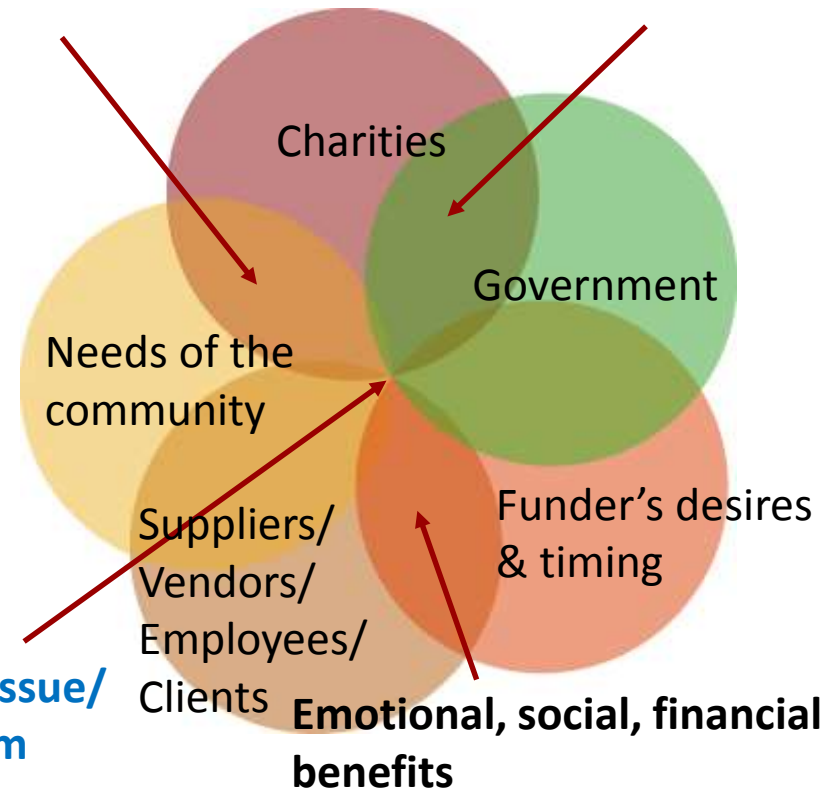
# The Eco-system of Giving

Users of the services offered by the charity



Policies

**Social Issue/  
Problem**





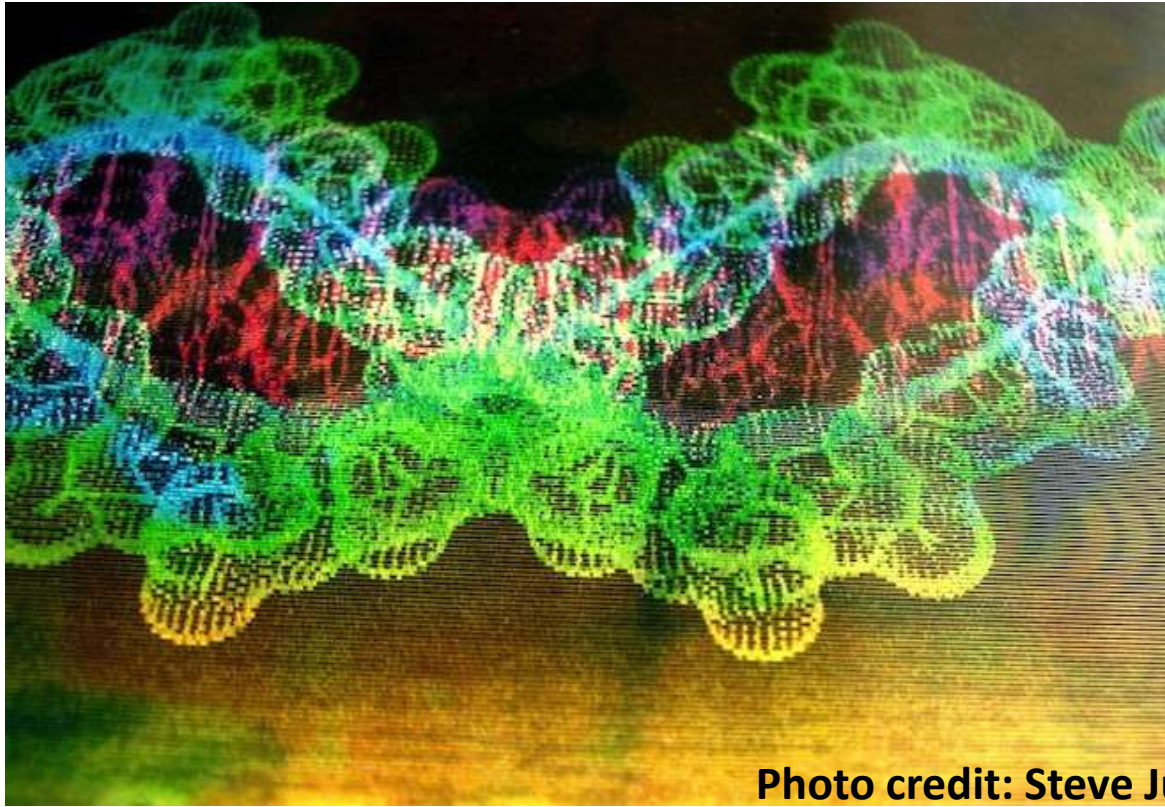


Photo credit: Steve Jurvetson/Flickr

## We are harnessing the frontier of charity data

... To make charitable giving a part of every person's banking experience, retain assets under management across generations **and** positively influence \$1Billion in charitable transactions by 2015.

## The New Paradigm: A Deeper Dive into DVI tech solutions





# Case Studies:

- Policy shifts around funding models (financing solutions instead of funding problems)
- Charity and Donor reporting standards (Charitable stock exchange)



## OLD PARADIGM



## NEW PARADIGM

Building sustainable and diverse communities through proper financing models



# Financing Solutions Instead of Funding Problems

Collective Impact and System Design



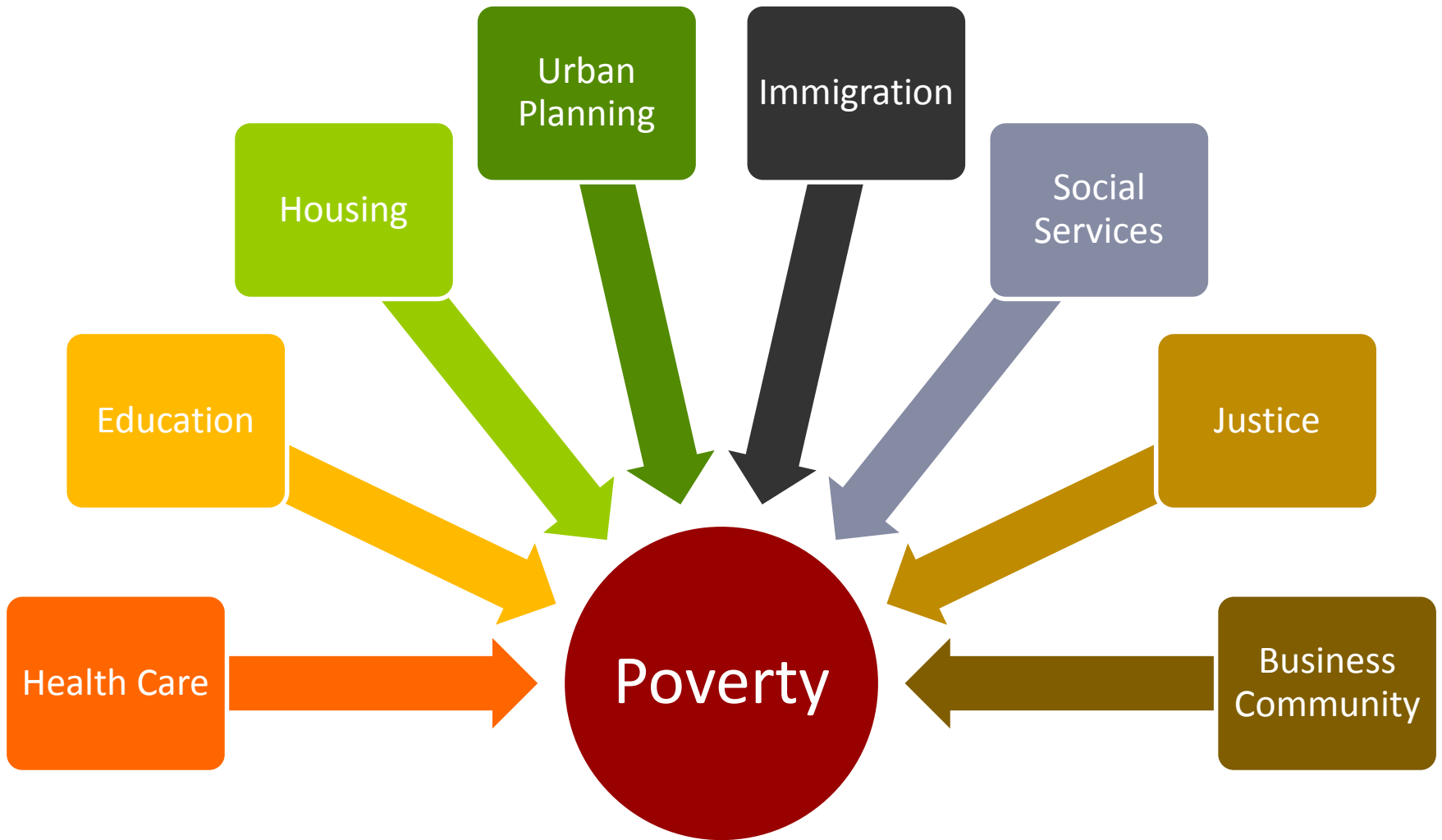




Photo credit: Microsoft Office Online



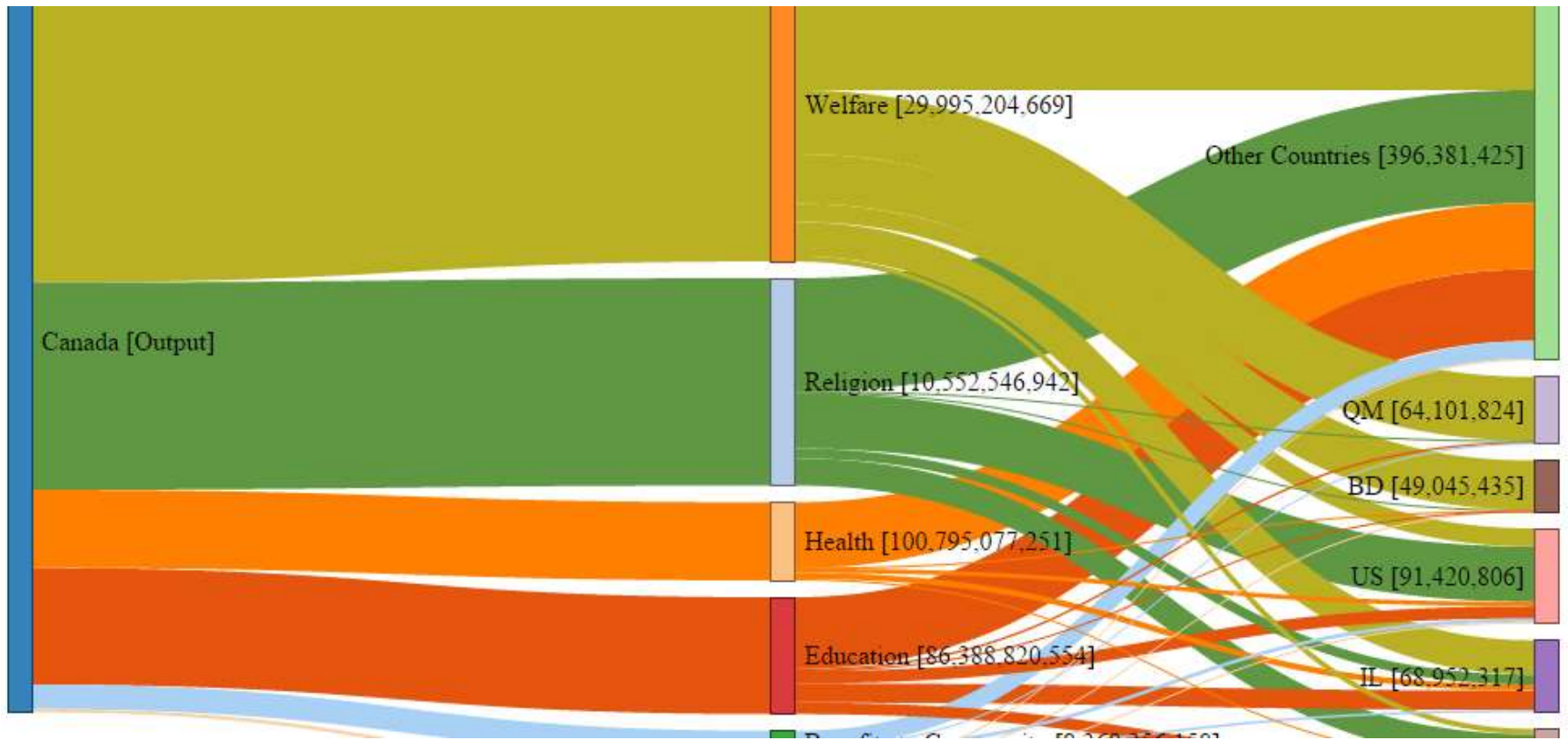


**\$8 – 9 Billion/Year**

**20%**

**3%**

**80%**



# Charity Credit Exchange

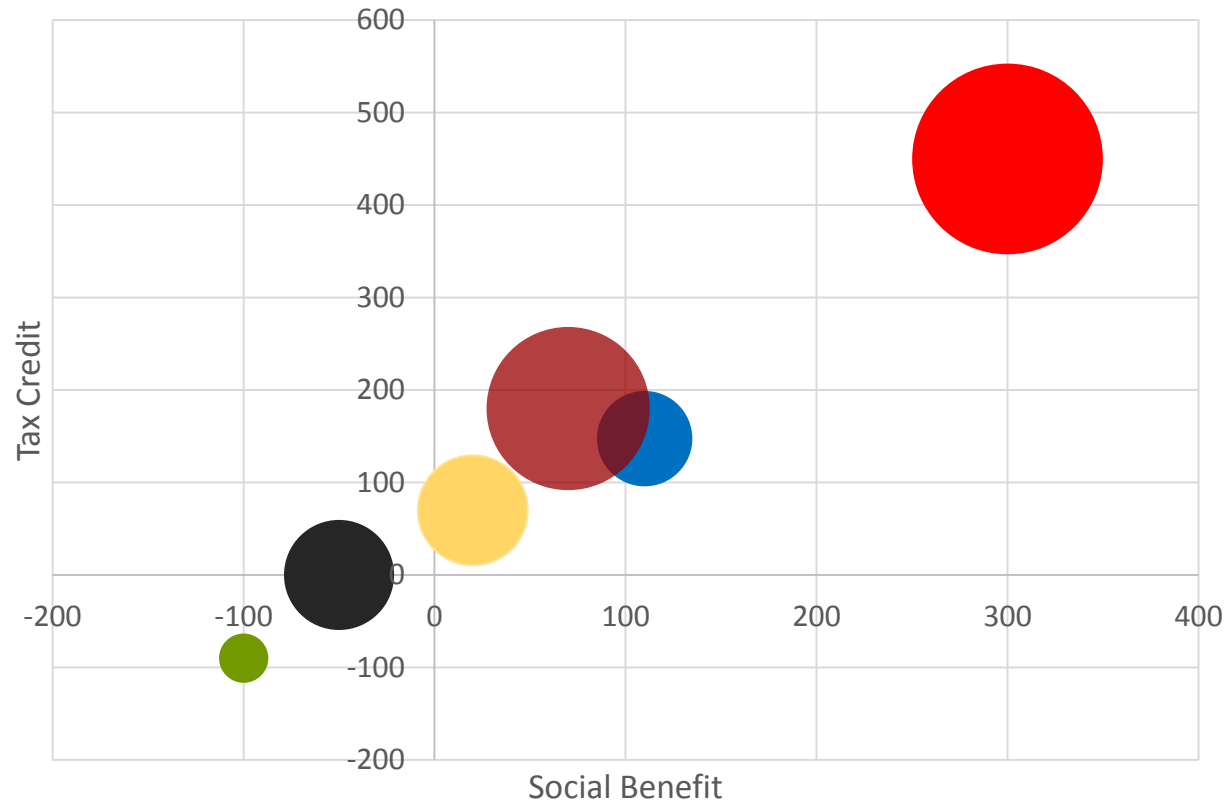
Charity and Donor Reporting Standards



# Creating a Paradigm Shift

- legislation change around how charities are created and audited,
- legislation change around how we recognize and credit donations
- an operational shift in how charities process donations and
- building an exchange platform that allows for trading of social impact and connecting people and organization







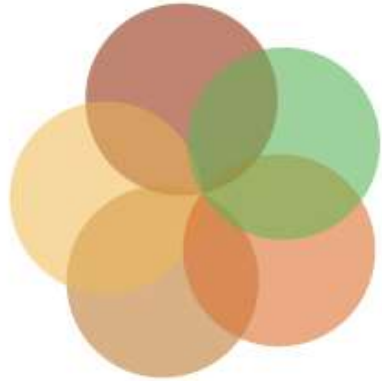
# Charity Data and the New Frontier

- New policies that govern how charities are regulated
- The ability for social change to be clearly monetized and financed
- The disruption of investment regulatory bodies
- The reshaping of traditional umbrella agencies and
- New policies around how companies can be structured

# Sources & Resources

- Philanthrocapitalism
- Blended Value
- Place2Give/DVI data
- Giving 2.0
- The Blue Sweater
- Stanford Social Innovation Review
- Harvard Business Review





# Dexterity

Ventures Inc.

## Contact information

Gena Rotstein, Chief Conversationalist

403-860-7572

[grotstein@dexterityventures.com](mailto:grotstein@dexterityventures.com)

@Place2Give @DexterityInc

[www.place2give.com](http://www.place2give.com)

[www.dexterityventures.com](http://www.dexterityventures.com)

