

BEHAVIORAL PHILANTHROPY CERTIFICATE

The [Certificate in Behavioral Philanthropy](#) offers advisors a unique opportunity to deepen their understanding of how behavioral science and philanthropic advising intersect. This program integrates multidisciplinary research insights, real-world examples, and practical case studies, equipping you with the insights and tools needed to help your clients achieve their philanthropic goals.

Through a comprehensive curriculum, you will explore the psychological factors influencing donor behavior, donor barriers, decision-making processes, and the impact of social and family dynamics on philanthropic giving. The case studies provide a hands-on opportunity to bring to life successful strategies and innovative approaches to foster donor engagement and maximizing philanthropic impact.

By the end of the program, you will gain a solid grounding in behavioral principles and be able to develop actionable strategies that can be implemented to enhance client relationships.

LEARNING OBJECTIVES

- Identify and analyze the psychological factors that influence donor behavior and the barriers they may face in their philanthropic journeys.
- Recognize the role of social and family dynamics in shaping philanthropic decisions, enabling you to understand diverse client motivations and engagement strategies.
- Apply behavioral insights through real-world case studies, allowing you to develop and implement effective strategies that foster donor engagement and maximize philanthropic impact.
- Plan actionable strategies tailored to individual clients' needs, enhancing your ability to build strong relationships and drive meaningful change within the philanthropic landscape.

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Behavioral science gives advisors a powerful edge in understanding their clients' motivations and barriers. This course will help you build stronger client relationships, craft personalized giving strategies, and position yourself as a trusted expert who delivers deeper impact and more fulfilling philanthropic outcomes.

-Julia Ritz Toffoli
ideas42



FACULTY

Julia Ritz Toffoli is an Associate Managing Director at ideas42 on the Giving Team, where she leads R&D and innovation in the philanthropic space, working with partners to design, test, and implement behaviorally informed interventions to make giving more intentional, strategic, and impactful—both for individual givers and the broader philanthropic community.

Jen Shafer is a Senior Behavioral Designer on the Giving Team at ideas42 where she uses insights from behavioral science to promote equity in philanthropy by effectively diagnosing challenges, conducting research, and implementing innovative designs.

Sarah Welch is a Managing Director at ideas42, a social enterprise that uses insights from behavioral science to invent fresh solutions to tough social problems. Over the past decade Sarah has worked to advance behavioral innovations across various challenges, from climate and consumer finance to criminal justice and health.

Dien Yuen is the Founder and CEO of Daylight. She was named in Wealthmanagement.com's 2025 Ten to Watch: Innovators and Influencers Set to Change the Industry. Dien was inducted into the 2023 National Association of Charitable Gift Planners (CGP) Hall of Fame and recognized for her academic leadership with the Distinguished Faculty Award from Wealth Management Institute in Singapore.

BEHAVIORAL PHILANTHROPY CERTIFICATE MODULES

- Introduction to Behavioral Science
- Introduction to Donor Psychology
- Case Study: Understanding the Donor Context
- Behavioral Strategies for Advisors
- Behavioral Philanthropy in Practice

COURSE FORMAT

Program Type: Certificate program - asynchronous course with module quizzes
Program Delivery: Readings, lectures, videos, graphics, downloadable advisor resources
Program Complexity Level: Intermediate

Daylight is an approved CE sponsor. Continuing education credits are eligible for completion of the Behavioral Philanthropy Certificate.
CFP®, CPWA®, CIMA®, RMA®: 5 hours
CAP®, CFRE, CSPG^{CM}: 5 hours

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70% of the variation in how people make decisions comes from their context rather than their differences as individuals. Our course will help you optimize the decision-making context for your donors, enabling them to pursue ambitious philanthropic goals.

-Jen Shafer
ideas42



Register for the **Behavioral Philanthropy Certificate** or
an **Annual Certificate Subscription** now!