

# Transformational Philanthropy: A Practical Guide and Worksheet

*“Money wisely placed and invested in people, research, or projects becomes the way to substantive change.”* –Tracy Gary

Transformational philanthropy supports societal change – that is, actions that seek to address the root causes of disadvantage or the practices that threaten values such as equitable living for all or a healthy planet. It strives to fund solutions that are proactive rather than reactive, and that speak to the underlying causes of people's distress.

As the table below demonstrates, there are differences in the effects of giving to charity and giving to transformation.

Charity vs. Transformational Philanthropy: Characteristics	
Charity	Transformational Philanthropy
Short-term fixes	Long-term solutions
Social services	Social change
Reactive	Proactive
Individual responses	Collective, organized responses
Dependent communities	Empowered, independent communities

## Becoming a Transformational Philanthropist

Everyone has a system of giving. It may be as unsophisticated as the time-honored shoebox: throw every direct mail piece into it and once a week, once a month or once a year, pull them out and write checks for the ones that appeal to you. Or it may be more spontaneous: write a check whenever an appeal strikes you as worthwhile, or someone asks. You may already be listing your contributions on a spreadsheet or directing a family foundation to send an annual check to a charity your family has been supporting for years.

To develop more intention and consciousness about how you give – to whom, how much, when and for how long, the exercises on the back will help you see your current system and explore whether your giving has been a reflection of your values and interests, and what changes you may wish to make now. Try to stay objective and not judge yourself for what you've done (or not yet done). From here, you can begin to move clearly and intentionally toward what you want.

### Exercise #1A: Review of Your Recent Giving

First, write a short statement about how you're feeling about your current giving. (For example, do you feel you're giving enough? Too much? Is it directed in the ways you want?)

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**Exercise #1B: Review of Your Recent Giving**  
List organizations you've given to in the past two years.

Organizations donated to in the last two years	Amount given	Why I gave

**Exercise #2: Giving Patterns**

Beginning with your list above, map your top five groups below to see the patterns of your giving.

Organization	Issues it addresses	Strategies it employs <sup>1</sup>	Size by budget <sup>2</sup>	Age <sup>3</sup>	Scope <sup>4</sup>

**1)** For example: direct service, public education, research, policy advocacy and leadership development. **2)** Small: less than \$250,000; Medium: \$250,000 - \$1,000,000; Large: more than \$1,000,000. **3)** Start-up: 0- 2 years; New: 2 - 5 years; Established: 5 - 10 years; Sustained: 10-Plus years. **4)** Local, State/Regional, National, International

**Exercise #3: Reflections** (Characteristics of the Groups You Supported)

Thinking about the characteristics of the groups you've donated money to in the past two years, answer the following questions:

1. Was your giving focused on certain categories or varied? Were these choices intentional? If they were, what were the reasons behind your choices?

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2. What do you see as the pros and cons of the pattern your giving has taken? (For instance, your dollars may have great impact on small, start-up organizations, but start-ups sometimes fail. Giving locally offers you personal connection, yet some solutions require a regional, national or global approach.)

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3. Looking at the characteristics of the groups you've funded, is there anything different you would like to do next year? What? Why?

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