

# WOMEN AND GIVING



ROCKEFELLER PHILANTHROPY ADVISORS  
PHILANTHROPY ROADMAP

Think of this slim booklet as an experienced friend—a partner who can guide you in investigating, learning and maybe even getting inspired by how women give.

Think of it as a companion as you explore how philanthropy can add to your life and the life of your loved ones.

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Because philanthropy can help organizations take calculated risks, not all philanthropy achieves its goals. However, when successful, philanthropic and personal investments can pay dividends in the form of meaningful connection and even joy.

Why does women's philanthropy matter? Here are three reasons:

1

**WOMEN CONTROL MORE  
OF THE FINANCIAL PIE THAN EVER BEFORE**

The IRS reports that 43 percent of the nation's top wealth holders are women. Top wealth holders are defined as individuals with assets of \$1.5 million or more. These assets are valued in total at \$4.6 trillion. As a whole, women control more than half of private wealth in the U.S.

2

**THE PERCENTAGE OF WOMEN  
WIELDING WEALTH IS ONLY GOING TO RISE**

Many women will inherit twice—from their parents and from their spouses or partners. Women will inherit 70 percent of the \$41 trillion in intergenerational wealth that is expected to change hands over the next 40 years [Forbes]. This philanthropic influence is likely to be amplified given that many women also play key roles in facilitating the education and involvement of other family members in giving.

3

**RESEARCH SUPPORTS THE IDEA THAT  
GENDER DIFFERENCES IN GIVING BETWEEN  
WOMEN AND MEN ARE REAL**

In a 2010 survey, single women were more likely to give charitably than single men by a margin of 9 percent and female-headed households were not only more likely to give, but also tended to give nearly twice as much. A 2011 survey found that women spend more time than men on due diligence before making decisions about charitable giving and view giving as a collaborative, shared even. It also found that women expect a deeper level of communication with the organizations they support and place greater importance than men on hearing about the impact of their gift.

Source: Women's Philanthropy Institute at Indiana University, Bank of America Merrill Lynch Survey of High Net Worth Women's Philanthropy, 2010 and 2011

# GETTING STARTED

Part of our *Philanthropy Roadmap* series, this publication provides an introduction to the world of women and philanthropy. Written for both established and emerging donors, it aims to help women delve further into the potential growth and fulfillment that can come from giving.

## RE-BALANCING PHILANTHROPY

Research shows women have the means and the motivation to change philanthropy. The organizational structure is developing, too. After the first prominent women-focused foundation, the Ms. Foundation, began grantmaking in 1972, the field grew slowly for the first few years. But in the last 20 years, it has exploded—with the Women's Funding Network reporting in 2011 the existence of 160 women's funds in the U.S. and around the world.

Not every woman donor, of course, will prioritize women's and girl's issues in her giving. But the story of the development of women's funds speaks to the potential for women to seek more balance in a vital sector of society, philanthropy, which has been controlled disproportionately by men. The emergence of a new wave of female philanthropic leaders suggests the re-balancing act is already underway. The Women's Donor Network, for example, says it leverages \$150 million a year through its members and allies "towards solutions that address the root causes of injustice and inequity."

# KEY QUESTIONS

Because this is your journey, we believe you will probably want to create your own itinerary. So we provide key questions designed to help you discover your own priorities. Here are a few to get you on your way.

**WHAT APPROACH TO GIVING — AND WHAT ISSUES — WILL ALLOW YOU TO FEEL AUTHENTIC? WHERE DO YOUR VALUES AND PASSIONS LIE?**

**HOW MUCH DO YOU WANT TO SET ASIDE FOR PHILANTHROPY?  
HOW MUCH DO YOU NEED FOR YOURSELF AND YOUR FAMILY?**

**WHAT ROLE MIGHT YOUR FAMILY PLAY  
IN YOUR JOURNEY AS A PHILANTHROPIST?**

**WHAT LEGACY DO YOU WANT FOR YOURSELF? FOR FAMILY MEMBERS?**

**WHAT PROFILE WOULD YOU LIKE TO HAVE WITH YOUR GIVING?  
THE POSSIBILITIES RANGE FROM STAYING ANONYMOUS TO HAVING  
YOUR NAME — OR YOUR FAMILY'S NAME — INSCRIBED ON A BUILDING.  
WHAT BEST SUITS YOU?**

**HOW WOULD YOU DESCRIBE THE INFLUENCE OF PARENTS,  
GRANDPARENTS OTHER RELATIVES? HOW DOES THAT IMPACT YOUR GIVING?**

**WHAT HAVE BEEN YOUR PERSONAL EXPERIENCES AS A DONOR —  
BOTH GOOD AND BAD?**

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FINDING YOUR PATH IN PHILANTHROPY

BETH SAWI

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When Beth Sawi retired at 50 from her role as Chief Administrative Officer of Charles Schwab, she reflected on what would make the next phase of her life as fulfilling. She took a large chunk of the stock she had accumulated in the company since its early days and put it into a donor-advised fund, then rolled up her sleeves and got to work in giving it away effectively. “I had written checks before,” she said, “but my main focus was on work and family. This new phase was really dedicated to learning how to do it right and support the most capable nonprofit leaders.”

Sawi has been transformed by her experience in philanthropy. “This is what keeps me grounded. There is abundance in this country, but it isn’t fairly distributed and that makes you all the more grateful for how much you have.”

It is the individuals she has encountered along the way who make all the difference to her, instilling a sense of gratitude for “all the hard work that is being done out there by people with very big hearts.” She remembers

traveling to New Orleans after Katrina when she was on the board of the Ms. Foundation, and she was touched deeply by the people who were working at small grassroots organizations, putting in long hours with little pay and physically and emotionally demanding work. “There are so many people out there at these organizations who are really the ones making a difference, and they do so virtually anonymously. They are what keeps me going—these people who have little pieces of angel in them. What would this country be without them?”

Sawi is a hands-on donor, and recommends that donors who have the time and are passionate about an organization learn to examine its financials. Joining the board is the next step, “but only once you know what excites you—give yourself a year to get familiar with the group and then accept the invitation.”

Philanthropy has been a learning experience. She knew that joining the board of the Alameda County Food Bank would involve fundraising, but it was an awkward task for her. In this new role, encountering the generosity

of others early on left an impression on her and was another example of how people have really made the difference in her experience as a philanthropist. “I made a relatively large ask of a donor I only vaguely knew on my first try at fundraising—\$100,000.” She was convinced that she’d spend a long time making these asks before getting anywhere, “but he said ‘yes!’ Wow. I was just stunned seeing that there were people out there who are so generous.”

Beth and her husband have devised a sharing method so that they have a pool of funds that they give collaboratively, and then their own separate funds to grant as they choose. “It really makes you think about your values as a couple. We’re good thought partners.”

Beth’s children are also involved in making some of the giving decisions. Having multiplied the Food Bank’s assets dramatically during her tenure on the board has been a large part of her legacy, but she also sees instilling philanthropic values in her children as an important facet. “My husband and I taught our kids the basic value of ‘Don’t be greedy—by giving more, you have more.’ I think my kids understand that now, and that certainly is a legacy I’m proud of leaving behind.”

“There is abundance in this country, but it isn’t fairly distributed and that makes you all the more grateful for how much you have.”

# DO WOMEN ACTUALLY GIVE DIFFERENTLY THAN MEN?

Unfortunately, there is very little research out there on how women's giving actually differs aside from their increased generosity, and what there is has very narrow sample sizes, so we must rely on other sources that indicate trends.

In 2010, the Women's Philanthropy Institute at Indiana University used a nationally representative sample of U.S. households to survey men and women's giving. With more than 800 responses, it found women are more likely to give than men and when they do give, they give more.

## OTHER EVIDENCE

Academic research and observations from philanthropic experts suggests the following trends:

Males tend to concentrate their giving among a few nonprofits, whereas females are more likely to spread the amounts they give across a wide range of charitable organizations.

Some women are hesitant to make big donations—in part because they are looking to support a number of organizations in the community. It's not uncommon for these women to prioritize support for the key organizations that make for a thriving and healthy community and to see how collectively these organizations can work together. Such women are less likely to be looking for a silver bullet or single solution.

Some women are likely to fund core basic human services like food, shelter and counseling, but studies suggest inconsistent findings about which causes attract most women's donations.

Though women philanthropists often attempt to connect with grantees, other donors and the populations impacted by their giving, research suggests that, ironically, they often make philanthropic decisions independently from their partner or spouse.

More research is needed, but it's also worth noting that the field of women's philanthropy is evolving day to day. Both on their own and with their giving networks, women are busy redefining gender roles in giving. In this sense, donors might carry out some of their own personal research by asking women friends who give what motivates them and how they go about their philanthropy.

*Disclaimer:* It's unwise to expect general research to fit individuals perfectly—or even at all. Our purpose here is to empower and embolden the individual philanthropist. Don't think of this information as prescriptive; rather, think of it as a starting point. The most thoughtful, effective philanthropy is a reflection of your own values and approach. Nothing can replace that.

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PHILANTHROPY, WITH ENTREPRENEURSHIP AND  
COLLABORATION, HELPS REDEFINE A NEIGHBORHOOD

JANE ROSENTHAL

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Her business partner is Robert DeNiro. She's produced more than two dozen Hollywood movies, including *Wag the Dog* and *The Good Shepherd*. But in New York City, she has special status as one of the philanthropist-entrepreneurs that created the Tribeca Film Festival. Her inspiration? She wanted to help spur the economic and cultural revitalization of lower Manhattan following the 2001 attacks on the World Trade Center.

"I was really obsessed with rebuilding the spirit of our neighborhoods," she told *Barron's* in a 2009 interview.

"People were afraid to go south of Canal Street, the military was walking around with guns and helicopters were clattering overhead. My starting point was the question of how we could create a new 'normal'; how we could give people something to look forward to?" She joined with DeNiro and her husband Craig Hatkoff to found the festival. "Nelson Mandela, on his first trip to New York after his release from prison, had talked about the unifying power of film and mentioned that movie nights at the prison had been his favorite times, because the

guards and prisoners could unite in enjoying the show. So when we wanted to move on, to signal that the mourning period was over but at the same time combine entertainment with something inspiring, we thought of this."

Tribeca has grown into one of the world's most influential film festivals, screening over 1200 films from over 80 countries since its start in 2002. More importantly for the philanthropic mission, the festival estimates that it has generated \$660 million in economic activity for New York City.

"I'm still surprised by the people we have reached," said Rosenthal.

"We knew early on that this had to have an educational element, and offer a way for all kinds of new and diverse voices to be heard, not just another film festival. So it became about more than economic revitalization; it was about promoting understanding and tolerance between people — and all through storytelling, which is the heart of the human experience."

Ms. Rosenthal and her partners also founded the Tribeca Film

Institute after 9/11. The nonprofit supports filmmakers through grants and professional development, offering educational programming that "leverages an extensive network of people in the film industry" to help New York City students.

"Knowing that you have helped to give someone self confidence or the power to express themselves," said Ms. Rosenthal about the film education project, "well, that's all we could hope for, really."

"... it became about more than economic revitalization; it was about promoting understanding and tolerance between people ..."

# FAMILY, LEGACY AND GIVING

Some male donors act independently — sometimes foregoing consultation with family members, whereas women often express interest in involving the next generation in philanthropy. Many women focus on how they can instill philanthropic values in children and grandchildren at an early age.

Sometimes this desire comes with a willingness to reach a compromise that allows everyone in the family to participate. Such compromises can extend a philanthropy's legacy and give new generations “skin in the game,” but they can also diffuse philanthropic focus.

Women donors might find themselves asking these questions:

**TO WHAT EXTENT SHOULD I MAKE DECISIONS INDEPENDENTLY  
AND TO WHAT EXTENT SHOULD I CONSULT FAMILY  
MEMBERS IN THE NEXT GENERATION OR GENERATIONS?**

**HOW DO I BALANCE THE NEXT GENERATION'S PRIORITIES  
WITH WHAT I SEE AS IMMEDIATE PHILANTHROPIC OPPORTUNITIES?**

**HOW CAN I INTEGRATE OUR FAMILY'S DIVERSE  
PHILANTHROPIC VIEWPOINTS AND INTERESTS WHILE KEEPING  
OUR GIVING ENJOYABLE AND REWARDING?**

Many women create their own wealth through business and investing. But some, because of their relative longevity, do — or will — inherit the source of their philanthropy. These women often see themselves as caretakers of this wealth. In spite of the current interest in foundations that spend-out

in a limited amount of time, many of these women donors want to pass on the ability to partake in philanthropy to future generations and therefore can be less likely to make big gifts or do anything to limit the lifespan of their foundations. Many women seek a balance between honoring their legacy while still expressing their own approach to philanthropy.

Philanthropy is often about relationships. Balance is paramount, but so is transparency. Many donors have learned that clarity while setting up a family philanthropy — or re-organizing it — can reduce conflict. By seeking engagement from family members before decisions are concluded, new possibilities can be considered and a better outcome achieved. But it all starts with the woman philanthropist herself and two very important questions:

Who will be involved  
in this philanthropy?

And if it is to be shared,  
how and for how long?

See other guides in this series, “Talking to Your Family About Philanthropy” and “Giving as a Couple” for more information.

There have been numerous Rockefeller women over the generations who have given with distinction—both broadening and deepening the family’s philanthropic heritage. They continued the Rockefeller legacy of giving while staking out their own territory. In this manner, they demonstrated strategic independence—the signature trait of Rockefeller women philanthropists. Here are three of them from three separate generations.

**LAURA SPELMAN ROCKEFELLER**

“Surely whatever others may think, it is our opinion that women, even as man, ‘can paddle her own canoe.’” Those were the words of Laura Spelman at her high school graduation in Cleveland in 1855. The daughter of an Underground Railway operator, an outspoken opponent of slavery and eventually an independent-minded teacher, she went on to become the wife of a philanthropic pioneer and industrial titan, John D. Rockefeller. She helped him with his business as well as his philanthropy. “Her judgment was always better than mine,” said her husband, who built Standard Oil into monopolistic the

first modern industrial corporation. “Without her keen advice, I would be a poor man.” Her deep religious faith drove her charitable activity, and her efforts to provide educational opportunity and training to newly emancipated African Americans were reflected in the strong support the Rockefellers gave to Spelman College, a historically black liberal arts college for women in Atlanta, which was named in her honor.

**ABBY ALDRICH ROCKEFELLER**

The progressive, art-loving daughter of a U.S. Senator, she married John D. Rockefeller, Jr. in 1901, and created her own approach as a philanthropist. She supported a variety of causes ranging from the YWCA and Planned Parenthood to the Red Cross, but she made her biggest impact in an area her husband strongly disliked. She loved the new ideas, interpretations and forms of modern art. He called the art she loved “unintelligible,” preferring medieval sculpture and tapestries. But she wasn’t deterred. And in 1929, she co-founded the Museum of Modern Art (MoMA) with friends Lillie P. Bliss and Mary Quinn Sullivan. Over many years, she gave of her

time and leadership, as well as her financial resources, helping to build the museum to iconic stature. “For her to have accomplished what she did must have seemed really amazing at the time,” said grandson Rodman Rockefeller, quoted in a PBS television special on the family. “She lifted us from a fairly narrow definition of life to a lot more fun in life, at the same time keeping this very constructive sense of obligation . . . this sense that there are things to be done and worlds to conquer and places to make improvements.”

**ANN ROCKEFELLER ROBERTS**

Author, activist and daughter of Nelson Rockefeller, she first became involved in indigenous people’s rights as a teenager in the 1950s. She eventually became a leading philanthropist for Native American issues, founding the Fund for the Four Directions in 1990. The fund supported environmental projects and the “revitalization of the lifeways and cultures of Native Americans of North America.” Eventually, the Fund for the Four Directions evolved so it was “directed by Native people for their own benefit,” according to Ms. Roberts. The fund is now part of the Ingrid Washinawatok El-Issa Flying Eagle Woman Fund (FEWF). Ms. Roberts has also served on the boards of many non-profit groups, including the National

Museum of the American Indian, the Philanthropic Collaborative and the Ms. Foundation for Women.

“Without her keen advice, I would be a poor man.”



# PRIVATE OR PUBLIC?

## THE VISIBILITY QUESTION

No journey in philanthropy is free of doubts. One common worry centers on the public exposure that can come with giving.

“If I become more visible in my giving,” donors sometimes ask, “what will the impact be on me and my family? If I start making larger donations or more public donations, will it compromise my privacy?”

The answers to these questions can have significant influence on the form and function of your philanthropy.

Anonymous donations can allow you and your family complete privacy. However, being a public advocate for a project can increase its impact and help recruit important allies and other funders.

On the down side, anonymous giving can limit the roles family members can take in philanthropy. On the other hand, putting your name and your reputation alongside an organization not only can open the possibility of similar organizations seeking financial support, it can also expose you and your family to public reaction—especially if the cause or the organization is controversial or part of a polarized debate.

While there are good reasons to give anonymously and other good reasons to be very public about one’s giving, most female donors exist somewhere in between. They state their goals and announce their grants, but do not seek a high profile or activist role. Donors may also employ both strategies—anonymous and public giving—for different types of gifts and at various points in their philanthropic journey.

Once again, process and clarity are valuable goals. Answering the visibility question offers an opportunity to discuss your philanthropy with important advisors, both personal and professional. Few women make decisions in true isolation. By being solicitous of others’ input, a better plan or way of approaching the issue may emerge. And doubts about the public/private balance in philanthropy can be eased.

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### APPROACHING A COMMUNITY PROBLEM FROM MULTIPLE ANGLES — FOOD DESERTS IN NYC

LAURIE TISCH

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Laurie Tisch made a big decision in 2007. The former nonprofit board chair—and co-owner of the New York Giants—became a full-time philanthropist, founding the Laurie M. Tisch Illumination Fund.

“Basically, money makes stuff happen,” she says of her approach to driving social change. “My family is quite male-dominated... This is my way to be in the business world, not just to write checks, but to work with a budget and metrics and success. It’s not the same success as the bottom line in a company, but there are some parallels.”

The Tisch family is well-known in New York City for its business success (the multi-billion dollar Loews Corporation with a wide array of diversified business holdings) and for its philanthropy (New York

University’s Tisch School of the Arts, the NYU Medical Center’s Tisch Hospital and the Tisch Children’s Zoo in Central Park).

Inspired by her parents’ generosity, Laurie Tisch sought to make her own mark on the city in a more strategic way, by improving access and opportunity for all New Yorkers.

Her foundation funds projects in education, arts, health and public service, but is perhaps best known for its Green Carts campaign, a multi-level strategy to respond to food “deserts” in New York City. These “deserts” are areas where fresh produce is hard to find and many people suffer from obesity and diabetes.

Starting with a \$1.5 million seed grant, Tisch worked with Mayor Michael

Bloomberg and city staff to introduce the Green Carts, which sell fruit and vegetables in areas that are underserved. By 2012, there were 524 active cart permits, translating to employment for 900 people. According to Ms. Tisch, the project also encourages “entrepreneurship, with each vendor owning and operating their individual carts.”

With philanthropic dollars, Ms. Tisch also sought to help people learn how to better incorporate produce into their diets and funded a new cookbook with recipes from chefs around the city. The idea, she says, is to make recipes and information about fresh produce just as accessible as the fruits and vegetables themselves. The green cart vendors distribute the cookbooks for free (10,000 have been printed) while on their rounds.

A third prong of the strategy was funding a documentary called *The Apple Pushers*, which had its premiere in 2011. The film, which looked at the Green Carts project in detail, was also backed by Ms. Tisch. She wanted to build public knowledge and support for the project, broadening impact by encouraging other communities to consider their own version of the Green Cart model. So far, Ms. Tisch says, eight other cities have shown interest.

Ms. Tisch approaches her philanthropy in a business-like manner. She devotes a great deal of time not just to her foundation, but to understanding her grantees and the wider issues they address. Still, the serious purpose comes with a sense of humor.

“Someone asked me why I’m doing this,” she recounts. “I said, “Because I looked in the closet and saw enough black shoes.”

“Someone asked me why I’m doing this,” she recounts. “I said, ‘Because I looked in the closet and saw enough black shoes.’”

## FINDING THE RIGHT FOCUS

It doesn’t matter how much you give as long as you give something—so goes one of fundraising’s oldest sayings. But common sense tells us this is false. A \$5 million dollar gift is likely to have a far different impact than a \$5 donation. Perhaps the truth in the old saying lies in the idea of giving not only in line with your budget, but in accord with your own priorities, purpose and individual inspiration.

Sustainable giving is a distinctly personal endeavor. Intuition, life experience, family history, values and personal connections come into play here along with the major “heart and head” elements of compassion and impact.

In this quest to find the right personal fit for philanthropy, some women can find themselves asking what would be the “responsible” giving style to adopt. Should they focus their philanthropy on a tightly-defined area or give to support a broad range of organizations?

The answer, of course, lies within the donor herself. The most effective philanthropy stems from issues that the philanthropist herself cares deeply about—issues with which a donor can identify and to which she can make a commitment.

Once motivation and focus are clear, a donor can seek solutions through her giving—funding not the problem, but concrete strategies to solve it. This means not only having a clear focus on a challenge of appropriate size, but having a clear vision of

what change you want to achieve. Whether you call it a goal, an outcome or a solution, it's important to define what end-result you seek. And you'll need a clear-eyed view of the milestones along the way that indicate progress.

For more information on the process of developing your own approach to giving, see the title guide in this series, "Your Philanthropy Roadmap."

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**"GIRLS NOT BRIDES"**  
**PARTNERSHIP-BASED PHILANTHROPY**  
**JENNIFER BUFFETT**

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Jennifer Buffett, and her husband Peter, started the NoVo Foundation with the aim of empowering women and girls as "agents of change" to help move global society from "a culture of domination to one of equality and partnership." Ms. Buffett is president of the foundation, guiding vision, strategy and grantmaking.

NoVo seeks to make change in three ways: ending violence against women and girls; advancing "Social Emotional Learning," which brings together academic achievement with positive emotional development and social understanding; and improving educational and economic opportunities in the developing world. The idea is that societal change will eventually flow from a new balance of power between

the genders. "We believe that once empowered, women and girls will play transformative leadership roles; and as women and girls become more equal partners with men and boys, a spirit of collaboration can better prevail in society."

In September 2011 at the Clinton Global Initiative, NoVo launched their support of a global project to end child marriage in a generation. Ms. Buffet explained the approach in a *Huffington Post* blog:

"At the NoVo Foundation, we know that prioritizing girls and women is one of the most fundamentally sound methods of changing our world for the better. We've learned that helping girls and women help themselves raises living standards for everyone.

Each year a girl stays in school boosts her future income by 10 to 20 percent. And since girls and women are likely to invest 90 percent of their income in their families — as opposed to a man's 30 to 40 percent — the education and empowerment of girls and women has an impact that ripples across a society.

"So what happens to girls early in their life makes a huge difference. On a learning trip to Ethiopia, where 49 percent of girls are married before they are 18, I came face to face with one of the biggest challenges that holds back the world's female population and keeps countries mired in poverty: child marriage."

The practice is widespread. Some studies estimate that one-third of underage girls in the developing world are married, according to NoVo. So when The Elders, a group of global leaders founded by Nelson Mandela, established a global campaign to end child marriage, NoVo offered early support, partnering with the Nike Foundation, the Ford Foundation and a number of other funders.

The campaign, Girls Not Brides, will work with NGOs, the private sector and governments to raise public awareness and galvanize change. Key to the project's success, says

Ms. Buffett, are the partnerships the project will build with local activists. "There are passionate and dedicated people around the world who have been struggling against this practice for years," says Ms. Buffett. "Our role will be to support and enable their efforts, and to raise consciousness on what they are doing and why."

“The single most important thing we can do is unleash the full power of half the people on the planet — women. We know that women need the tools of development, but development also needs women. All the disadvantages, from poverty to violence, from ill health to illiteracy, that women experience around the world also limit the advance of families, communities, entire nations.”

JUDITH RODIN

PRESIDENT OF THE ROCKEFELLER FOUNDATION

## MOVING FORWARD

Women donors often develop their giving strategy around relationships. Outwardly-focused, they collaborate, communicate, engage, involve, understand, adapt, and most importantly, build bridges to different individuals and groups. Their aim: to serve multiple purposes while sustaining or even strengthening relationships.

But what if the best way to realize the full potential of these talents meant looking within instead of without? Would you be willing to take an inward journey to better serve the communities around you?

After all, no matter how other-oriented you might be, your giving depends on yourself. Sometimes we forget how much our identity drives our lives. And sometimes we forget that we hold more control over that identity than anyone else, that we are the authors of our life stories as well as the main characters.

So, as you consider your next steps in giving, why not think about these questions:

**IN YOUR LIFE STORY, WOULD YOU LIKE TO INCLUDE A PASSAGE ON YOUR GIVING? HOW WOULD IT READ?**

Try this exercise. Write your own story as a philanthropist in a short paragraph. It matters little if you have given for years or not at all. (If you haven't given much, use your imagination.) What really matters to you? How might you best contribute? What brings you the deepest satisfaction? Then put your paragraph away. After a few days, read it aloud, listening to it afresh. Does

it capture your spirit? How can you change the story to better match who you are and the role you might want as a donor? If you do the exercise, be prepared. Once you begin to tell the story of your own giving, you might feel compelled to make it real. And you might be surprised where it takes you.

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that we hold more  
control over that identity  
than anyone else,  
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# DONOR CHECKLIST

## **FIND A PERSONAL FOCUS**

Sustainable giving is personal giving. Intuition, family history and personal experience all have roles to play alongside fact-based analysis and due diligence. Take the time to understand what focus will be most rewarding to you as a person. The right approach can help your passion for philanthropy grow, and that makes your charitable giving more effective.

## **BALANCE PERSONAL MOTIVATIONS WITH FAMILY AND WIDER COMMITMENTS**

The English poet John Donne should have written “No woman is an island entire of itself.” Many women are natural connectors, networkers and communicators and so have a sense of the wider concerns of family and community. The grace of giving often relies on a dynamic balance between the “me” and the “us” in philanthropy.

## **LEARN FROM OTHERS**

A growing community of donors is often willing to share expertise and experience. Networking with peers can increase your impact even as you gain friends. Networking with the non-profits you support and the people they serve can lend insights that inform future giving.

## **FIND ADVISORS WHO SHARE YOUR VALUES**

These people—friends, peers, family and professionals—can help you find your voice as a donor. Women sometimes inherit advisors from parents and grandparents. Find someone who fits you and your own approach.

#### **BUILD TIME AND BALANCE INTO YOUR GIVING STRATEGY**

Carrying out thoughtful philanthropy while balancing work, family and other commitments is often challenging. Consider a strategy that recognizes all your commitments and gives you time—and wiggle room—to get things done without getting too stressed. Also, be aware that philanthropy can change over time. Plan flexibility into your approach so change can be welcomed when it's appropriate.

#### **TALK TO YOUR CHILDREN EARLY ABOUT MONEY AND GIVING**

Financial literacy empowers a donor's philanthropy. Beyond that, communication about money matters helps children understand family values. Good communication usually has traffic flowing in both directions. Giving children space to share their values and motivations around family philanthropy can foster their involvement.

#### **PLAN AN EXIT STRATEGY**

Some women might think: "If I've funded an organization for 10 years I have to do it forever." This is not true. Consider making commitments over limited periods of time and being transparent with your grantees about these time frames early in the process. A gift is not a life commitment.

# FINDING YOUR COMMUNITY

Because communication, collaboration and community are often important to women's giving, finding the right group(s) of donors with whom you share interests should play a role in your strategy. Responses from a recent study of women in a giving network indicate that women who are well networked in their giving are more loyal to philanthropic causes, more educated and informed about philanthropic choices, and more trusting of nonprofits than others. Fortunately, there is tremendous infrastructure in place to help women and donors network. You are bound to find donors who can help teach you, collaborate with you and introduce you to others who can do the same.

Below you will find donor groups sorted by various categories. If none of these look up your alley, you might consider creating your own group of like-minded women who are passionate about the issues or geographic region to which you give. Sometimes it can be started as simply as inviting a few friends over for discussion.

#### **NETWORKS OF WOMEN DONORS**

Women Donors Network

*womendonors.org*

Rachel's Network

*rachelsnetwork.org*

Women Moving Millions

*womenmovingmillions.org*

Women's Funding Network

*womensfundingnetwork.org*

Women's Perspective on Money and Spirituality

*womensperspective.org*

**GROUPS FOR DONORS  
BY AFFINITY AND GEOGRAPHY**

Finding fellow donors who have a common philanthropic focus, or donors in your region with whom you can network on a local scale, can make a huge difference in your learning curve and your ability to collaborate.

For a complete list of donor groups by affinity  
*www.cof.org/about/affinitygroups.cfm*  
For a complete list of U.S. regional associations  
*givingforum.org*

**A SELECTION OF OTHER DONOR NETWORKS**

Bolder Giving  
*boldergiving.org*  
Institute for Philanthropy  
*instituteforphilanthropy.org*  
Legacy Ventures  
*legacyventures.org*  
National Center for Family Philanthropy  
*ncfp.org*  
Omidyar Network  
*omidyar.com*  
Resource Generation  
*resourcegeneration.org*  
Social Venture Partners  
*svpinternational.org*  
Synergos Global Philanthropists Forum  
*synergos.org*  
Threshold Foundation  
*thresholdfoundation.org*  
Wealth and Giving Forum  
*wealthandgiving.org*

**ROCKEFELLER PHILANTHROPY ADVISORS**

is a nonprofit organization that currently advises on and manages more than \$200 million in annual giving. Headquartered in New York City, with offices in Chicago, Los Angeles and San Francisco, it traces its antecedents to John D. Rockefeller Sr., who in 1891 began to professionally manage his philanthropy “as if it were a business.” With thoughtful and effective philanthropy as its one and only mission, Rockefeller Philanthropy Advisors has grown into one of the world’s largest philanthropic service organizations, having overseen more than \$3 billion to date in grantmaking across the globe.

Rockefeller Philanthropy Advisors provides research and counsel on charitable giving, develops philanthropic programs and offers complete program, administrative and management services for foundations and trusts. It also operates a Charitable Giving Fund, through which clients can make gifts outside the United States, participate in funding consortia and operate nonprofit initiatives.

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