

**WITH  
KNOWLEDGE  
COMES  
CHANGE**



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# OVERVIEW

**SINCE 2001, CHANGEMAKERS HAS BEEN PROVIDING INTENSIVE, PERSONALIZED DONOR LEADERSHIP EDUCATION TO PROGRESSIVE MINDED INDIVIDUALS AND FOUNDATIONS TO ADVANCE SOCIAL CHANGE AND COMMUNITY-BASED PHILANTHROPY.**

As the work continued, Changemakers made a strategic commitment to expanding this donor leadership curriculum to speak to and be inclusive of diverse communities of color in the United States, who themselves have long traditions of giving back. Our Essentials for Diversity in Giving (EDG) curriculum aims to integrate the leadership and expertise of diverse communities into the broader field of philanthropy.

Since 2005, Changemakers has been developing EDG curriculum modules for donor networks and public and community funds to support the values and practices of social change philanthropy among donors of color (the end user). The commitment to honoring the leadership of people and communities most impacted by injustice and to advocating for strategic, effective, and sustainable giving practices is core to the EDG curriculum.

## WHAT IS IT?

**CHANGEMAKERS DEVELOPED THE EDG PROJECT IN PARTNERSHIP WITH HINDSIGHT CONSULTING TO HELP SUPPORT PHILANTHROPY THAT BUILDS CHANGE FROM WITHIN COMMUNITIES, NOT FROM WITHOUT.**

Primary goals of the project are:

1. to develop and disseminate tools and resources that provide donor education and leadership to donors of color, and
2. to strengthen the role that ethnic, tribal and racial giving already plays in the broader field of philanthropy.

EDG is made up of curriculum modules that are based on principles of social change and community-based philanthropy. The modules, offered separately or in conjunction with each other, work to support all donors, especially donors of color, in: (a) examining their current giving practices, (b) challenging themselves to become more strategic in their giving, and (c) supporting the health and sustainability of their communities and beyond.

Ten modules make up the EDG curriculum. Each module offers sample agendas, worksheets and tools that address both the context and practice of giving. Modules can be implemented with donors in both informal and formal settings.

## THE MODULES

**THE TEN MODULES HAVE BEEN DEVELOPED AS A CONTINUUM OF LEARNING, BEGINNING WITH AN EXPLORATION OF VALUES, MOVING INTO A FRAMEWORK FOR GIVING, THEN MOVING INTO PRACTICE, AND ENDING WITH A DEEPER UNDERSTANDING OF THE CONTEXT OF GIVING.**

In practice, the EDG curriculum identifies Modules 1,2 and 3 (The Values of Giving) as core components and “pre-requisites” for any of the subsequent modules. Modules can be combined to meet specific donor needs; however, it is critical that key elements of Modules One and Two always be present at the onset of any donor education and leadership practice. These modules set the tone and ground donors in personal and community experiences of giving that will strengthen their participation and ensure the relevance of the other modules.

### THE VALUES OF GIVING

1. I GIVE: Who I am as a donor/giver
2. WHY GIVE?: From motivation to intent
3. EQUITABLE GIVING: Social change philanthropy

### THE PRACTICE OF GIVING

4. WE GIVE: Cultural memories of giving
5. WHERE TO GIVE: Creating a strategic giving plan
6. HOW TO GIVE: Demystifying philanthropy and financial tools
7. EVERYONE GIVES: Practices in collective giving
8. DOES MY GIVING MATTER?: Understanding the impact of what I give
9. BEYOND THE GIFT: Identifying your value added

### THE CONTEXT OF GIVING

10. OUR GIVING HISTORY: The story of philanthropy in the United States

## SUPPORT

**CHANGEMAKERS WILL BE OFFERING TRAIN-THE-TRAINERS WORKSHOPS AND TECHNICAL ASSISTANCE SUPPORT IN CONJUNCTION WITH THE RELEASE OF THE EDG CURRICULUM.**

## WHY EDG?

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### **EDG WAS DEVELOPED OUT OF A NEED TO SUPPORT, ACKNOWLEDGE AND EXPAND PHILANTHROPY AMONG AND WITHIN COMMUNITIES OF COLOR.**

According to the U.S. Census Bureau, in 2000, 30% of the U.S. population consisted of African Americans, Latinos, Asian Americans and Native Americans. The U.S. government projects that by 2050 people of color will comprise nearly half of the U.S. population. However, a disproportionately small percentage of foundation giving supports communities of color. The EDG curriculum thus is needed, in part, to strengthen a donor base that can effectively fund within its own communities. Simultaneously, EDG's implementation is needed to encourage mainstream foundations to engage with and provide more support to communities of color.

Although significant disparities between Whites and people of color still exist, census data shows increases in economic markers, including average household income, high school graduation rates, and business ownership among people of color. Rising wealth and long-standing traditions of philanthropy (including but not limited to giving through churches, to family, or sending money "back home") notwithstanding, very few resources exist for donors of color. According to a New Visions Philanthropic Research & Development study (The Donor Education Initiative, 2003), only 14% of existing donor education providers offer programs for ethnically diverse donors. When the scope is narrowed to donor-of-color education with a social change focus, there is little available.

The Forum of Regional Associations of Grantmakers' landmark report from 2006, "Racial, Ethnic and Tribal Philanthropy," observed, "[Although] the dynamics of race, economics, history, tradition, social context, religion and language are ever-present... [and] knowledge, awareness and sensitivity of these dynamics [should be] core competencies, [most] mainstream foundations or advisors were not engaging donors of color at this level. [Instead] their outreach may take essentially the same product used with

White donors and offer it to Blacks or Latinos without careful consideration to how racial or other experiences shape that person's interests or goals."

Most of the ethnic funds, social change funds and other donor-serving organizations that comprise the community-based philanthropic sector do not have the capacity to develop and execute donor education and engagement programs. Conversations with Changemakers grantees and other experts in the field reveal that even when these organizations have a majority of people of color on the board and in the grantee community, their base of financial support is still primarily White donors. Where successful donor education and engagement activities have been developed, such as the Coalition for New Philanthropy in New York, substantial outside investment from foundations was required. (Changemakers was among the funders of the Coalition for a New Philanthropy in its early phase.)

At Changemakers we have been in conversation with both donors of color and foundations serving communities of color who have expressed a desire to find new ways to engage more donors of color in their work. We have a history of relationships (as both a funder and collaborator) with several of the ethnic funds and philanthropy networks and many racially diverse community-based public foundations. Examples include the 21st Century Foundation, Native Americans in Philanthropy, Asian-American Pacific Islanders in Philanthropy, Coalition for New Philanthropy, Headwaters Fund of the Sacred Circle, and the National Black United Fund. Individuals affiliated with these organizations have served on our board, program and grants committees.

## METHODOLOGY

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### **THE EDG CURRICULUM HAS BEEN DEVELOPED TO INTERACT WITH DONORS PERSONALLY AND PROFESSIONALLY. IT PROVIDES TOOLS, EXERCISES AND WORKSHEETS THAT FRAME AND FACILITATE CONVERSATIONS TO MEET DONORS AT ANY LEVEL OF PHILANTHROPIC EXPERIENCE AND/OR CAPACITY TO GIVE.**

EDG is based upon a peer learning model, requiring participants to engage with each other, to share personal knowledge and to serve as both teacher and student. Facilitation of these modules follows these principles as well. Sharing personal stories is a key strategy within the learning space for team building and identifying values. These personal stories serve as the foundation for the modules, which are then situated in a broader community context for a deeper group learning process.

# WHO WE ARE

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## CHANGEMAKERS

**CHANGEMAKERS IS A NATIONAL PUBLIC FOUNDATION WHICH SUPPORTS PHILANTHROPY THAT IS TRANSPARENT, ACCOUNTABLE, EFFECTIVE AND WORKS TOWARDS SOCIAL CHANGE.**

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We work within the philanthropic sector to shift *where* money is directed – to address root causes of social and environmental problems – and *how* money is given. We partner with individual donors, family foundations, and philanthropic organizations to explore accountable, strategic, inclusive, collaborative, democratic and creative processes that align with social change values. We promote social change philanthropy to create a better world for all.

Changemakers is connected to social justice movements and to leaders of social change funds and community-led philanthropy. We also have strong relationships within the larger world of philanthropy. Changemakers provides values-based donor education, advocacy and strategic communications to advance the principles and practices of social justice philanthropy.



## HINDSIGHT CONSULTING

**HINDSIGHT CONSULTING WAS FOUNDED BY DARRYL LESTER IN 2001.**

HindSight Consulting provides tools and strategies to assist organizations in building communities by design instead of by accident or out of crisis. For over thirteen years, HindSight's founder, Darryl Lester, has been assisting organizations and individuals to be more effective in dealing with issues of race and equity; more intentional in developing strategic plans; and more insightful in creating assessment models to monitor progress, impact and change. Darryl's core work has been organizing and assisting individuals and organizations to develop strategic ways to invest their time, talent, and treasure in order to build and sustain healthy communities.

HindSight Consulting supports individuals, non profits, foundations and corporations that value learning and reflection as key components to organizational advancement. Self reflection and redirection are critical to the success of any progressive organization. Through creative ideas and innovative strategies, HindSight Consulting empowers clients to be more effective.



# LIST OF MODULES

## THE VALUES OF GIVING

### 1. I GIVE:

#### Who I am as a donor/giver

This module is designed to assist individuals in developing a deeper and broader identity as someone who gives. Through storytelling and personal exploration, participants in this workshop will develop tools to integrate giving as a critical component to other areas of their identities, in particular that of being a person of color.

### 2. WHY GIVE?:

#### From motivation to intent

This module is designed to help donors understand personal and community motivations for giving of time, talent and treasure. This module explores how our giving can help us achieve both personal satisfaction and being an active contributor to long-term social change for our communities and those we care about.

### 3. EQUITABLE GIVING:

#### Social change philanthropy

This module provides an overview of what is behind the growing discussion of social change philanthropy and offers strategies for individual donors to align their giving with values that support equity, sustainability and community-led decision making.

## THE PRACTICE OF GIVING

### 4. WE GIVE:

#### Cultural memories of giving

As people of color, many of us were raised with cultural practices around giving that are not connected to traditional and mainstream philanthropic practices in the United States. This module helps donors identify the giving and sharing practices they were raised with to strengthen the ways in which they choose to give today.

### 5. WHERE TO GIVE:

#### Creating a strategic giving plan

The first step in becoming a social change donor is knowing why we give and understanding the value in giving. This module works with individuals to develop a strategic giving plan, including a philanthropic mission statement and plan of action for creating change and positive impact through the sharing of time and resources.

### 6. HOW TO GIVE:

#### Demystifying philanthropy and financial tools

Many tools and vehicles for giving that can support and strengthen our giving strategies exist in the philanthropic sector. This module provides information about specific tools and how the broader field of philanthropy operates; it also helps participants determine which tools might be most appropriate to their needs.

### 7. EVERYONE GIVES:

#### Practices in collective giving

Giving in community is a strategy that has been employed by communities of color for centuries. This module provides up-to-date examples and practical tools for starting up and practicing philanthropy in an intentional space with others.

### 8. DOES MY GIVING MATTER?:

#### Understanding the impact of what I give

Whether or not our gift mattered and was effective in helping us meet our goals for how and why we gave are questions that are always present. This module looks at the impact of giving, both for the donor and the recipient.

### 9. BEYOND THE GIFT:

#### Identifying your value added

Giving is more than writing a check or serving on a board. As individuals, we have access to resources that we may not always consider when we think about what we can give. This module helps participants identify the areas in their lives they can leverage to increase the impact and value of the gifts they already give.

## THE CONTEXT OF GIVING

### 10. OUR GIVING HISTORY:

#### The story of philanthropy in the United States

This module provides an historical perspective of how philanthropy has been operating in the U.S., both formally and informally. Specific discussion looks at how immigrant communities and communities of color have integrated the practice of self-help and mutual aid societies into their day-to-day lives. It proposes that the future of philanthropy will be shaped, to some degree, by how communities of color find their place in this history and redefine their roles.



# **EDG FACILITATORS GUIDE**

# INTRODUCTION

**THE ESSENTIALS FOR DIVERSITY IN GIVING (EDG) PROGRAM WAS DEVELOPED TO BOTH DEEPEN THE PHILANTHROPIC PRACTICE OF EMERGING AND ESTABLISHED DONORS OF COLOR AND BUILD COMMUNITY IN A LARGER SENSE BETWEEN THESE DONORS.**

To accomplish this, the curriculum has been developed in a way that moves beyond a traditional training program to one that guides participants along a journey of self-discovery and action. This calls for a style of leadership that partners with the curriculum and personally engages with both the content and the participants.

The facilitator, therefore, plays the role of guide and coach during the EDG experience, calling upon personal experience and knowledge as an accompanying “bag of tricks” that creatively weaves in and out of the learning points of the various modules.

Successful facilitation requires that the leadership has already explored his/her own identity as a donor of color and put these values into a giving practice. The modules are designed to be guides for the facilitator; however, they do not provide all the answers for workshop delivery. They allow for creativity and flexibility on the part of the facilitator to insert additional knowledge, information and personal stories to ground the material in the practice and values-based experience.

In order to understand the framework of employing facilitators as collaborative guides, rather than objective trainers, it is helpful to understand the supporting principles and values of this curriculum.

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## **1. EVERY PART MAKES UP THE WHOLE**

**IN THE SAME WAY THAT ANY FUNCTIONING MACHINE DOES NOT OPERATE EFFECTIVELY WITHOUT EACH PART ENGAGING APPROPRIATELY, THE SUCCESSFUL PRACTICE OF PHILANTHROPY REQUIRES THAT ALL PIECES OF ITS MACHINE BE ENGAGED.**

Not only is the EDG space created to honor and respect all aspects of participants’ identities, it also demands space that nurtures interconnection and intersection of these identities. This occurs through interactive activities, discussions and planning. The work is rooted in the experience of donors of color who have engaged extensively in the fields of philanthropy, leadership development, and community organizing and have brought these tools into the framework. Elements and structures of the modules are also grounded in a deep analysis of the intersection of gender, race, class and power. In each workshop, the EDG curriculum believes that every story matters, every experience leads to greater collective practice, and every part makes up the whole.

## **2. THE JOURNEY BEGINS WITH A STORY**

**WITHIN THE CULTURAL TRADITIONS OF PEOPLE OF COLOR, STORYTELLING AND MYTH-SHARING HAVE BEEN WAYS TO PASS ON VALUES, HISTORY AND CULTURE.**

In the same ways, the EDG curriculum is grounded in the practice of sharing the personal to impact the growth and experience of the collective whole. Throughout the modules, space is provided for stories to be shared in a variety of formats: creatively, didactically, interactively and experientially. The facilitator’s role is to dress the stage, if you will, by setting an example, for the journey always begins with a story.

## **3. KNOWLEDGE IS EXPERIENCE, EXPERIENCE IS KNOWLEDGE**

**AS MENTIONED EARLIER, THE EDG CURRICULUM PROVIDES AN OPEN GUIDE FOR THE FACILITATOR TO FOLLOW AND TO INSERT EXPERIENTIAL KNOWLEDGE AS APPROPRIATE.**

In addition to soliciting stories and supplementing the modules with culturally specific examples, the facilitator understands that key knowledge related to giving and sharing also resides within the group. Creating an environment of trust and respectful interchange allows the participants to engage both as participants and leaders within the EDG experience. Even though a language around giving may be sparse at the onset of a workshop, the experience of giving and sharing is always rich. Eliciting this knowledge as a way to share practices and honor traditions deepens the learning experience for all in the room. Furthermore, the overall experience of the EDG curriculum is how knowledge is shared through the modules — every aspect matters. Knowledge is experience and experience is knowledge.

# TIPS FOR A SUCCESSFUL WORKSHOP

# CLOSING & EVALUATION

## BE FLEXIBLE

Practice flexibility and openness with time, the content, yourself and those in the room. The overall experience is what matters, not necessarily the details of how that happens.

## BE CREATIVE

The modules are a guide, full of suggestions and ideas based on the experience of several facilitators and donors; however, nothing is set in stone. Explore spaces within the structure to weave in your own creativity. For example, if you have experience in meditation, lead the group through a guided meditation exercise instead of a silent, free writing exercise.

## KNOW YOUR AUDIENCE

Making the EDG experience relevant asks that the facilitator also understand, at a certain level, the needs, backgrounds and experiences of the participants in the room – even before the workshop begins. This can happen practically through a registration survey or through introductory phone calls by the facilitator. Staying present and actively listening while in the room will also deepen your understanding and allow for the creativity and flexibility to best meet the participants where they are at.

## LISTEN

Facilitation can be a tiring process because every minute, we are actively listening to what is being said in the workshop and, perhaps more importantly, to what is not being said. Practice walking around the room while the participants are engaging in small groups, observe interactions and reflect back stories and examples that you have heard throughout the day. This can create an atmosphere that leads to respect and appreciation for all involved.

## TALK OPENLY ABOUT MONEY AND GIVING

Being vulnerable and sharing our own struggles and achievements on our giving journey open the door for the participants to bring their full selves into the process. Talking about money is very often a challenging and frightening process for many. If the facilitator models his/her own journey using a language about giving and money that is open, transparent and values-based, the participants will more easily step into the conversation.

## BE PRESENT

The facilitator must remain engaged in the process in order for all the participants to be fully engaged. Staying present, emotionally and psychologically, throughout the entire workshop maintains the flow of the experience and gently asks the participants to stay connected with you.

## LAUGH

Money and giving are often talked about behind closed doors, in elite spaces and in deeply serious tones. Bringing laughter, humility and joy into the room can not only help put people at ease and challenge a stigma around these conversations, it can also evolve the space into a memorable and transformative experience for everyone involved.

## MOST IMPORTANTLY, HAVE FUN!

We are all donors, we are all givers – the journey we are traveling on together, with the help of the EDG curriculum, is but one step along the way to collectively supporting and engaging in social change. All of our giving of time, talent and treasure will grow and expand exponentially as a result of this process. As people of color, our journey as donors is essential to creating a world in which everyone benefits, everyone thrives and all experience full human dignity.

Enjoy the journey!

PLEASE USE THE FOLLOWING GUIDELINES FOR THE **CLOSING & EVALUATION** PORTION OF EACH MODULE.

## CLOSING

**PURPOSE:** To reconnect participants with the workshop goals and to bring a sense of closure to the conversations, questions and insights that emerged.

**PROCESS:** The facilitator asks participants to take a moment in silent reflection to consider the moments during the workshop that either struck a personal chord or challenged them to act, and to think of a word or phrase that reflects that moment for them. Going in a circle, to the left, each participant then shares that word or phrase with the full group, closing with a thank you from the facilitator to everyone in the room.

Another way to close is to do group appreciations, also in a circle around the room. One person starts, sharing a personal appreciation to the person standing to the left, and then it continues around the circle. For workshops that involved more intimate storytelling, this closing offers the ability for the deeper connections to take root within the group.

## EVALUATION

**PURPOSE:** To assess the immediate impact of the workshop content and delivery with the participants.

**PROCESS:** Informally, the facilitator asks the group to share elements of the workshop that worked for them personally, and any elements that they think could be changed for next time. These can be recorded on flip chart paper or in notes.

Formally, it may be beneficial for the organization presenting the workshop to develop a written evaluation tool that aligns with their specific workshop and donor education goals. Changemakers has developed a tool, in conjunction with JDC Partnerships (see worksheets) which may be used as a template for this work.



# **EDG MODULE FRAMEWORKS**

# MODULE ONE

## I GIVE: Who I Am as a Donor/Giver

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THIS MODULE IS DESIGNED TO ASSIST INDIVIDUALS IN DEVELOPING A DEEPER AND BROADER IDENTITY AS SOMEONE WHO GIVES. THROUGH STORYTELLING AND PERSONAL EXPLORATION, PARTICIPANTS IN THIS WORKSHOP WILL DEVELOP TOOLS TO INTEGRATE GIVING AS A CRITICAL COMPONENT TO OTHER AREAS OF THEIR IDENTITIES, IN PARTICULAR THAT OF BEING A PERSON OF COLOR.

### LEARNING OBJECTIVES:

- » TO IDENTIFY AND COMMUNICATE PERSONAL REASONS FOR GIVING
- » TO SUPPORT INDIVIDUALS TO BRING THEIR FULL SELVES TO THEIR GIVING PRACTICE
- » TO SHARE STORIES OF WHAT BEING A DONOR/GIVER MEANS TO DIFFERENT PEOPLE

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about being a donor/giver

**PROCESS:** The facilitator asks participants to introduce themselves and share an example of someone in their lives they see as being a donor/giver. To begin, the facilitator should model an introduction and example.

#### ACTIVITY: Tree of Life

**WORKSHEET:** Tree of Life

**MATERIALS:** Poster board, markers

**PURPOSE:** To provide a creative space for participants to explore their roots, influences and identities and share their "trees" with each other

**PROCESS:** The facilitator hands out the Tree of Life worksheet and a sheet of poster board to each participant. Following the instructions on the worksheet, participants take at least 30 minutes alone to identify and draw their personal trees on the poster board. Once completed, each participant presents his/her tree to the rest of the group, highlighting key elements they choose.

Trees can be posted on the wall for the remainder of the workshop.

#### ACTIVITY: Word Walk

**MATERIALS:** Flip chart paper, tape to post on walls, flip chart markers

**PURPOSE:** To engage participants within a discussion of language, definitions and assumptions about roles and practices related to giving. This activity looks to challenge assumptions and expands definitions of what it means to be a donor.

**PROCESS:** Facilitator prepares several sheets of flip chart paper and posts them around the room. Each sheet will have one word written on it from the list below. Facilitator asks participants to walk around and write on the sheets what comes to mind for each word. This is a silent exercise. Once everyone has contributed to each sheet, the facilitator leads a discussion with the group as to what emerged, what surprised them and any other reactions to the activity. Facilitator closes with a short discussion about how definitions can both support and hinder our identities and practices as a donor/giver.

**WORDS FOR WORD WALK:**

Philanthropist  
Grassroots community member  
Community member  
Donor  
Giver  
Volunteer  
Charity  
Activist

# QUICK START RESOURCES

**WEBSITE:** The Knowledge Center on Racial, Ethnic and Tribal Philanthropy.  
[www.givingforum.org/retphilanthropy](http://www.givingforum.org/retphilanthropy)

**BOOK:** Remaking America: How the Benevolent Traditions of Many Cultures Are Transforming Our National Life. Copies can be obtained through the Council on Foundations, [www.cof.org](http://www.cof.org)

## CONVERSATION: Are You a Donor?

**WORKSHEET:** Are You a Donor?

**PURPOSE:** To demonstrate the variety of ways people give and provide the group with standard definitions of terms

**PROCESS:** The facilitator poses the questions to the group listed on the top of the worksheet, asking participants to raise their hands if they answer yes, then reviews the definitions provided. If it doesn't come up from the group, the facilitator links this activity with the Word Walk to further demonstrate the different grounding points that support an identity of a donor/giver.

## PRESENTATION: Importance of a Donor Identity

**PURPOSE:** To provide participants with content related to this module and support the sharing of knowledge that each participant also brings

**PROCESS:** Facilitator begins the discussion, asking the group where they may notice an intersection between their giving and their identity as a person of color. The facilitator shares with the group how giving has been a core practice within communities of color, including within immigrant communities, and how the practice has become a community building activity. Facilitator also shares with participants how giving with this lens can help individuals support change within their lives, families and communities. Facilitator can provide examples and/or ask group to share.

### KEY QUESTIONS TO ADDRESS:

- » How does being a donor intersect with being a person of color?
- » How do experiences of race and class influence how we give?
- » How does giving build relationships to community?
- » How does giving connect with being a social change agent?

## ACTIVITY: Identity Circle

**MATERIALS:** Blank piece of 8.5" x 11" paper for each participant

**PURPOSE:** To highlight the multiple dimensions of our identities and further explore the ways in which they intersect

**PROCESS:** Facilitator distributes one blank sheet of paper to each participant and asks each one to draw a circle on the page. In the center of the circle, participants are to write their name, and around the circle, like sun rays, list the different parts of their identities, such as "father," "artist," "daughter," etc. Facilitator can model a circle on flip chart paper at the beginning of the activity. Once completed, the facilitator asks participants to share and, if it doesn't come up within the discussion, points out how being a donor is just one piece of an already complex interrelated identity that we carry.

## SHARING STORIES: Donor Stories

**PURPOSE:** To share different personal stories of how people have come to embrace and integrate an identity as a donor of color

**PROCESS:** Prior to the workshop, facilitator will have identified and invited three to four local community members who are willing to share their personal journeys to becoming a donor/giver. Facilitator will moderate and lead a question and answer session at the end.

**NOTE:** If putting together a panel is not possible, this discussion can be framed around a short DVD video, prepared by NC GIVES, which shows a diversity of perspectives and stories on what it means to be a donor. (See Resources for how to obtain this video.)

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator's Guide.

# MODULE TWO

## WHY GIVE?: From Motivation to Intent

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THIS MODULE IS DESIGNED TO HELP DONORS UNDERSTAND PERSONAL AND COMMUNITY MOTIVATIONS FOR GIVING OF TIME, TALENT AND TREASURE. WE WILL EXPLORE WHAT DRIVES OUR GIVING AND WAYS TO MAKE THE PRACTICE MORE INTENTIONAL TO SUPPORT AND CONTRIBUTE TO CHANGE FOR OUR COMMUNITIES AND THOSE WE CARE ABOUT.

### LEARNING OBJECTIVES:

- » TO IDENTIFY PERSONAL AND COMMUNITY REASONS TO ENGAGE IN PHILANTHROPY
- » TO CLARIFY PERSONAL EXPECTATIONS AND BARRIERS RELATED TO GIVING
- » TO EXPLORE STRATEGIES FOR ACHIEVING PERSONAL GIVING GOALS

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a reason for why they gave a significant gift of time, talent and/or treasure in the past year. To begin, the facilitator should model an introduction and example.

#### ACTIVITY: Giving Crossroads

**MATERIALS:** Flip chart paper, markers, tape for posting on the wall, color sticker dots

**PURPOSE:** To provide participants the opportunity to explore the underlying motivations that fuel their giving

**PROCESS:** Facilitator writes each phrase below on a piece of flip chart paper, with a short definition for each, if needed, and posts the sheet at the front of the room. The facilitator then distributes color sticker dots (five to each participant) and asks them place them next to the word(s) that best describe their motivations for giving. Once completed, the facilitator asks participants to observe the clusters of dots and engages participants in a brief discussion of how this exercise felt. The group can be split up into dyads for deeper reflection and reconvened for a full group discussion.

“MOTIVATIONS” FOR ACTIVITY:

- » “Something needs to be fixed!” (Rescue)
- » “It’s the right thing to do.” (Moral/ethical)
- » “Caring for others is a basic tenet of my religious/spiritual beliefs.” (Spiritual/religious)
- » “I get to hang out with community and have a fun time!” (Social)
- » “It helps to reduce the amount of taxes I pay to the government.” (Legal/tax benefit)
- » “Others are less fortunate than me and I need to give back.” (Altruism)
- » “Caring for others in my community is about caring for myself.” (Mutual aid/sovereignty)
- » “My family is my community.” (Family/legacy)
- » “I am passionate about this issue/cause!” (Passion)
- » “I support efforts that lead to long-term social/political change.” (Strategic/political)

GUIDING QUESTIONS FOR DYADS:

- » Why do certain people give to certain causes but not others?
- » How do people decide how much to give?
- » Do you give in different ways for different reasons?
- » How have your reasons for giving shifted and/or evolved in your life?

# QUICK START RESOURCES

**WEBSITE:** More Than Money Journal:  
[www.morethanmoney.org](http://www.morethanmoney.org)

**ESSAY:** "The Heart of Philanthropy" by  
Tom Beech  
[http://www.fetzer.org/PDF/Heart\\_of\\_Philanthropy.pdf](http://www.fetzer.org/PDF/Heart_of_Philanthropy.pdf)

## **PRESENTATION: Linking Motivation to Intent**

**WORKSHEETS:** Giving Scenarios, I Give, Because...

**PURPOSE:** To share a process for participants to explore how their reasons for giving can actually be connected to achieving personal goals

**PROCESS:** Facilitator walks group through Giving Scenarios worksheet, asking for their reflection as to why they think the individuals gave in the ways presented. At this point, the facilitator can also share statistics of general giving practices in the U.S. across different communities/classes (see Resources for data references). From this discussion, the facilitator talks about how having intent can strengthen the gifts we make and hands out the I Give, Because...worksheet. Facilitator leads the group through the three steps of the worksheet and asks participants to share their "statements," once completed.

## **ACTIVITY: What Stops Us from Giving?**

**PURPOSE:** To create space for the participants to identify and explore the possible reasons that hinder their giving

**PROCESS:** This activity begins with a short, silent writing exercise. The facilitator asks each person to jot down reasons he/she has used to say "no" to making a gift of time, talent and/or treasure. Then in small groups (two to three people), the participants can discuss the barriers that came up for them. The activity closes with a full group discussion and report back from the small groups.

**GUIDING QUESTIONS FOR SMALL GROUPS:**

- » Was this a one-time barrier or something that comes up often for you?
- » How do you feel your race and/or class identity/background influence your decision to give or not?
- » What suggestions do you have for others on how to address and work with these barriers?
- » How would you reframe the barrier that states "I don't have enough"?

## **CONVERSATION: From Talk to Practice**

**PURPOSE:** To share strategies with participants of ways to begin aligning with giving intentions

**PRACTICE:** In the full group, the facilitator gives examples of strategies that can support more intentional giving, such as a giving plan, and asks the participants to share personal practices with the group. The facilitator can capture these ideas on flip chart paper.

## **CLOSING & EVALUATION**

Please see the Closing & Evaluation section of the Facilitator's Guide.

# MODULE THREE

## EQUITABLE GIVING: Social Change Philanthropy

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COMMUNITY PHILANTHROPY MANIFESTS IN MANY DIFFERENT WAYS, SUCH AS UNION ORGANIZING (EX. UNITED FARM WORKERS) AND RURAL COLLECTIVE SUPPORT (EX. BARN RAISING) TO NAME A FEW. THESE FORMS OF PHILANTHROPY HAVE PROVEN TO BE TRANSFORMATIVE AND RESPONSIVE TO THE NEEDS OF BOTH THE DONOR AND THE RECIPIENT. THIS MODULE PROVIDES AN OVERVIEW OF WHAT IS BEHIND THE GROWING DISCUSSION OF THESE MORE BALANCED FORMS OF GIVING, ALSO KNOWN AS SOCIAL CHANGE PHILANTHROPY. IN ADDITION, IT PROVIDES STRATEGIES FOR INDIVIDUAL DONORS TO BOTH STRENGTHEN AND ALIGN ALL AREAS OF THEIR GIVING WITH VALUES THAT SUPPORT EQUITY, SUSTAINABILITY AND COMMUNITY-LED DECISION MAKING.

### LEARNING OBJECTIVES:

- » TO IDENTIFY GUIDING PRINCIPLES OF SOCIAL CHANGE PHILANTHROPY
- » TO DEVELOP STRATEGIES FOR IMPLEMENTING PRINCIPLES INTO PERSONAL AND COMMUNITY GIVING SITUATIONS
- » TO EXAMINE GIVING STRATEGIES THAT WORK TO SUPPORT EQUITABLE FORMS OF GIVING AND RECEIVING FOR DONORS AND COMMUNITY

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a brief story of how a small act/decision in their lives has led to long-term or significant change. To begin, the facilitator should model an introduction and example.

#### DISCUSSION: What Is Social Change?

**PURPOSE:** To encourage a group discussion around the various definitions of and criteria for social and community change

**PROCESS:** The facilitator opens the discussion by asking the participants to share their thoughts on what constitutes social change, asking for specific examples along the way, such as union organizing, legislation, welfare reform policies, etc.

This discussion will help frame the rest of the workshop discussion of what social change philanthropy is and how giving can support and contribute to the participants' definition of social change.

### ACTIVITY: The Giving Matrix

**WORKSHEETS:** Strategic Giving Matrix

**PURPOSE:** To demonstrate the different motivations and strategies employed when giving and the areas of intersection that can lead to impact and change

**PROCESS:** Facilitator hands out the Giving Matrix worksheet and asks participants to review and answer guiding questions. In dyads, the participants can then discuss their responses and reactions to this matrix. After at least five minutes in small groups, the facilitator reconvenes the participants and walks the group through the chart, asking for examples of each type of giving.

**POSSIBLE GUIDING QUESTIONS:**

- » What personal benefits do you see for giving in each area?
- » How do you see these strategies interconnect?
- » How can this matrix help you personally in your giving?
- » How do these strategies connect to your definition of social change?

# QUICK START RESOURCES

**WEBSITE:** [www.justphilanthropy.org](http://www.justphilanthropy.org)

**REPORT:** Social Justice Philanthropy: An Overview, by Aileen Shaw, 2002. [www.synergos.org/knowledge/02/socialjusticeoverview.pdf](http://www.synergos.org/knowledge/02/socialjusticeoverview.pdf)

## CONTENT SHARING: Finding the Values

**WORKSHEET:** Principles of Social Change Philanthropy

**PURPOSE:** To identify key principles of social change philanthropy and examine how these principles, when practiced, can lead to more sustained support for community led and social change impact

**PROCESS:** On flip chart paper posted on the wall, the facilitator writes each principle listed on the Principles of Social Change Philanthropy worksheet – one per sheet. After handing out the worksheet to the participants, the facilitator asks for definitions and giving practices that model and/or mirror each of the listed principles. The facilitator contributes to the lists if ideas are not offered by the participants. The activity ends with the facilitator speaking to how these values and practices connect to a practice of social change philanthropy and the important role these approaches can offer to donors of color seeking to support change and greater equity through their giving.

## IN PRACTICE: Scenarios for Change

**PURPOSE:** To provide the space for participants to apply principles of social change philanthropy to hypothetical giving situations and explore how, in practice, social change and community led philanthropy can vary from situation to situation

**PROCESS:** The facilitator assigns a scenario (one each) to small groups of at least four participants and asks the groups to design a giving strategy based on the scenario for at least 30 minutes. The facilitator reconvenes the participants for report backs and a full group discussion about how the principles come into play.

At the end of the discussion, the facilitator asks the participants to consider their own personal giving situation and come up with one ACTION ITEM for deepening their practice with one or more of the principles of social change philanthropy. Then, going around the room, each participant is asked to share the action item with the group.

### POSSIBLE GROUP SCENARIOS:

- » Family foundation structure
- » Inherited 250k
- » Giving 10k over the next 12 months
- » Group of people have 1k collectively to give
- » Rural collective: A drought has devastated two small farms in the small community

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator's Guide.

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# MODULE FOUR

## WE GIVE: Cultural Memories of Giving

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AS PEOPLE OF COLOR, MANY OF US WERE RAISED WITH CULTURAL PRACTICES AROUND GIVING THAT ARE NOT CONNECTED TO TRADITIONAL AND MAINSTREAM PHILANTHROPIC PRACTICES IN THE UNITED STATES. THIS MODULE HELPS DONORS IDENTIFY THE GIVING AND SHARING PRACTICES THEY WERE RAISED WITH TO STRENGTHEN THE WAYS IN WHICH THEY CHOOSE TO GIVE TODAY.

### LEARNING OBJECTIVES:

- » TO FURTHER DEVELOP A DEEPER UNDERSTANDING OF PERSONAL PHILANTHROPIC PRACTICES AND MOTIVATIONS
- » TO PROVIDE THE SPACE FOR STORYTELLING AS ACTION
- » TO ENGAGE WITH PARTICIPANTS AROUND THE INTERSECTION OF AN IDENTITY AS A PERSON OF COLOR AND A PHILANTHROPIST/DONOR/GIVER

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a brief story of a unique way they witnessed giving/sharing take place in their family growing up. To begin, the facilitator should model an introduction and example.

#### ACTIVITY: Philanthropy Word Walk

**PURPOSE:** To explore various definitions of philanthropy and giving and to allow participants to explore the ways in which their own practices may relate to how others define these terms

**PROCESS:** The facilitator writes different definitions of philanthropy (see Resources for definition sources) on separate pieces of flip chart paper and asks participants to walk around and read them, then stand by the one that resonates closest to their own understanding and/or practice of giving. Facilitator leads a discussion about the definitions and personal meaning the participants bring to each one.

#### ACTIVITY: What's Your Lens?

**WORKSHEET:** 10 Lenses Activity Packet

**PURPOSE:** This activity utilizes The 10 Lenses, a tool developed by Mark A. Williams that allows participants to explore the lenses they bring to the world and, ultimately, to their practice of giving.

**PROCESS:** Facilitator hands out the 10 Lenses activity packet and asks the participants to fill it out and score it (see Worksheet instructions). The facilitator asks the participants (in small groups of three to four) to reflect on their scores and identify ways in which they believe this lens impacts how they give. Activity closes with a full group report back and discussion.

# QUICK START RESOURCES

**WEBSITE:** The Knowledge Center on Racial, Ethnic and Tribal Philanthropy.  
[www.givingforum.org/retphilanthropy](http://www.givingforum.org/retphilanthropy)

**BOOK:** Remaking America: How the Benevolent Traditions of Many Cultures Are Transforming Our National Life. Copies can be obtained through the Council on Foundations, [www.cof.org](http://www.cof.org)

## PRESENTATION: Giving in Communities of Color

**PURPOSE:** To provide participants with an overall look at how income, wealth and giving are connected in communities of color

**PROCESS:** Through a presentation and group discussion format, the facilitator presents data (see Resources for data sources) of wealth and giving trends in selected communities of color. This presentation can include a “compare/contrast” component to it in relation to White communities in the U.S.

## CONVERSATION: Cultural Memories of Giving

**MATERIALS:** Flip chart paper, flip chart pens, tape

**WORKSHEET:** Timeline of Philanthropy

**PURPOSE:** For participants to practically and tangibly identify the ways in which giving and sharing were modeled in their families/communities growing up. It also helps situate current giving practices in cultural roots, where appropriate.

**PROCESS:** This conversation begins with the creation of a large timeline that all participants contribute to. Several flip chart sheets, upon which a time line is drawn with key years indicated and the present year to the far right, are posted on the wall and connected with tape. The facilitator asks participants to reflect and build out the timeline with significant personal, familial, or larger cultural moments and memories of giving. Once completed, the facilitator guides the participants in a reflection of what appears on the timeline. The facilitator may choose to use the Timeline of Institutional Philanthropy worksheet to compare and contrast with the participants’ timeline.

## GUIDING QUESTIONS:

- » What do we know about the history of giving among our particular ethnic or racial group(s)?
- » What are shared stories we have received from elders, family members, community, etc?
- » Where do we see our current giving practices mirrored on this timeline?

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator’s Guide.

# MODULE FIVE

## WHERE TO GIVE: Creating a Strategic Giving Plan

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THE FIRST STEP IN BECOMING A SOCIAL CHANGE DONOR IS KNOWING WHY WE GIVE AND UNDERSTANDING THE VALUE IN GIVING. THIS MODULE WORKS WITH INDIVIDUALS TO DEVELOP A STRATEGIC GIVING PLAN, INCLUDING A PHILANTHROPIC MISSION STATEMENT AND PLAN OF ACTION FOR CREATING CHANGE AND POSITIVE IMPACT THROUGH THE SHARING OF TIME AND RESOURCES.

### LEARNING OBJECTIVES:

- » TO DEVELOP INDIVIDUAL UNDERSTANDING OF PHILANTHROPIC MOTIVATIONS AND VALUES
- » TO PROVIDE TOOLS TO CREATE INDIVIDUAL GIVING PLANS
- » TO EXPLORE GIVING STRUCTURES CONNECTED TO PERSONAL VALUES

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and to share one magic power they would like to have and how they would use it in the world. To begin, the facilitator should model an introduction and example.

#### PRESENTATION: The Practice of Giving

**WORKSHEETS:** Giving Paradigm, Strategic Giving Matrix

**PURPOSE:** To build context for giving within communities of color and explore the different ways personal giving plays out within this context

**PROCESS:** The facilitator begins with a presentation of statistics related to giving and wealth within and for communities of color (see Resources for data sources). As the conversation develops within the group, the facilitator can segue the discussion to exploring how personal giving manifests within this context with the Giving Paradigm and/or Giving Matrix worksheets.

### ACTIVITY: What Do I Value?

**WORKSHEET:** Know Your Values

**PURPOSE:** To help participants identify the key operating values in their lives and in their giving practices

**PROCESS:** Using the Know Your Values worksheet, the facilitator guides the participants through the activity. Once completed, participants share their top three to five guiding values and speak to how they defined them.

# QUICK START RESOURCES

**BOOK:** *Inspired Philanthropy; Your Step by Step Guide to Creating a Giving Plan*, by Tracy Gary with Nancy Adess (Third Edition). Jossey-Bass Publishers, 2007. [www.josseybass.com](http://www.josseybass.com)

**BOOK:** *Robin Hood Was Right: A Guide to Giving Your Money for Social Change*, by Chuck Collins and Pam Rogers with Joan Garner. W.W. Norton & Co., 2001. [www.wwnorton.com/catalog/fall00/032085.htm](http://www.wwnorton.com/catalog/fall00/032085.htm)

## ACTIVITY: Developing Your Giving Plan

**WORKSHEETS:** I Give, Because..., My Giving Plan, Issue Areas, Analysis of Current Giving

**PURPOSE:** For participants to build on the Values activity to develop, in a step by step process, a framework for their personal giving plan

**PROCESS:** The facilitator opens the activity with a discussion of the importance and role of a mission statement for non-profit organizations, eliciting knowledge from the participants. The facilitator then leads the discussion to the importance of a mission statement for personal giving and the intentionality it can inspire. This activity continues with the facilitator walking the participants through the I Give, Because... and then the My Giving Plan worksheet. Instructions are included on the worksheets. The Analysis of Current Giving can be used in this exercise as a tool to help individuals fill out their Giving Plan and identify where they may or may not want to expand their giving. A possible way to engage participants is through small group sharing at the different steps, as the facilitator deems appropriate.

## CONVERSATION: Taking Action

**WORKSHEET:** Ways to Give

**MATERIALS:** Blank index cards

**PURPOSE:** To explore different modes of giving to include within an individual giving plan and identify a next step for each participant related to their giving plan

**PROCESS:** With the Ways to Give worksheet as a guide, the facilitator leads a group discussion of the various strategies and tools participants are using to support their giving plans. The facilitator may also spend time sharing how different strategies can lead to various types of impact.

To close, the facilitator hands out a blank index card to each participant and asks them to write down at least one next step related to their giving plan, including a time they would like to complete it by. Once completed, the facilitator asks each person to share the action step with the full group.

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator's Guide.

# MODULE SIX

## HOW TO GIVE: Demystifying Philanthropy and Financial

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MANY TOOLS AND VEHICLES THAT CAN SUPPORT AND STRENGTHEN OUR GIVING STRATEGIES EXIST IN THE PHILANTHROPIC SECTOR. THIS MODULE PROVIDES INFORMATION ABOUT SPECIFIC TOOLS AND HOW THE BROADER FIELD OF PHILANTHROPY OPERATES, IT ALSO HELPS PARTICIPANTS DETERMINE WHICH TOOLS MIGHT BE MOST APPROPRIATE TO THEIR NEEDS.

### LEARNING OBJECTIVES:

- » TO PROVIDE PARTICIPANTS WITH OPTIONS OF HOW TO MANAGE, HOLD AND INVEST THEIR MONEY USING THE TOOLS AND STRATEGIES THAT SUPPORT THEIR PHILANTHROPIC VALUES
- » TO DEMYSTIFY THE TOOLS AND CONCEPTS THAT UNDERGIRD TRADITIONAL PHILANTHROPIC PRACTICES
- » TO SHARE STORIES WITH LOCAL COMMUNITY MEMBERS ON THE USE OF PHILANTHROPIC TOOLS TO IMPLEMENT EFFECTIVE GIVING STRATEGIES

### AGENDA

Welcome and introductions

### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a brief story of a unique way they witnessed giving/sharing take place in their family growing up. To begin, the facilitator should model an introduction and example.

### ACTIVITY: Money Bingo

**WORKSHEET:** Money Bingo cards

**PURPOSE:** To facilitate an entrée into the conversations of money, class and privilege and explore the ways that money has been used (or not) in our lives

**PROCESS:** The facilitator hands out Money Bingo cards, one per participant, and asks everyone to go around the room to ask the other participants if a given statement is correct for them. If the answer is yes, the person's name is put in that box. Try to encourage participants to get as many names as possible.

At a point when most people have "won" by filling in one or more rows, the facilitator brings the group back together to reflect on the activity and explore how money and privilege often connect with the tools and strategies we use for giving.

### GUIDING QUESTIONS:

- » Were there statements you were hesitant to ask about? If so, which ones and why?
- » Were there statements you were asked about by several people? If so, why do you think that is?
- » Which statements spoke to your personal experience with money, class and/or privilege?
- » Did any of the statements make you feel uncomfortable? If so, which ones and why?

# QUICK START RESOURCES

**GLOSSARY:** For a glossary of common philanthropic terms, please visit the Council on Foundations, [www.cof.org/learn/content.cfm?ItemNumber=740&navItemNumber=2256](http://www.cof.org/learn/content.cfm?ItemNumber=740&navItemNumber=2256)

**BOOK:** *Classified: How to Stop Hiding Your Privilege and Use It for Social Change*, by Karen Pittelman and Resource Generation, at [www.classifiedbook.com](http://www.classifiedbook.com)

## Tools

### PRESENTATION: Identifying Tools

**WORKSHEET:** What's in Your Tool Box?

**PURPOSE:** To share and explain a variety of tools and strategies for giving, in both formal and informal ways

**PROCESS:** The facilitator breaks the participants into small groups (three to four people) and asks them to brainstorm tools and strategies for philanthropy and giving and then report back to the full group. It may be helpful to capture report backs on flip chart paper in two categories: institutional and community based. After each group has presented their lists, the facilitator hands out the What's in Your Tool Box worksheet and talks more in depth about each tool and strategy, including those that came up in the small group brainstorm.

### ACTIVITY: Using the Tools

**WORKSHEETS:** Tools Scenarios

**PURPOSE:** To provide space for participants to explore how to implement the previously discussed tools and strategies

**PROCESS:** In small groups, participants receive different scenarios provided on the Tools Scenarios worksheets.

**GROUP ONE SCENARIO:** \$6 million inheritance

**GROUP TWO SCENARIO:** \$15k to give next year

**GROUP THREE SCENARIO:** \$450k received in trust

**GROUP FOUR SCENARIO:** \$1000 raised from 10 friends

### SHARING STORIES: Donor Stories

**PURPOSE:** To share stories and engage in actual experience of local community members who have used different tools and strategies to support their giving

**PROCESS:** Invite two to three folks from the local community who are reflective of the participants in the workshop to share personal experiences using specific tools. The facilitator will serve as moderator, asking that each panelist speak to both the benefits and challenges of the tools and strategies he/she selected. The presentations are followed by a full group question and answer session.

### CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator's Guide.

# MODULE SEVEN

## EVERYONE GIVES: Practices of Collective Giving

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COMMUNITIES OF COLOR HAVE FOR CENTURIES EMPLOYED GIVING IN COMMUNITY AS A STRATEGY TO ACHIEVE SELF-SUFFICIENCY AND PRACTICE CULTURAL VALUES OF MUTUAL CARE. THIS MODULE PROVIDES UP-TO-DATE EXAMPLES AND PRACTICAL TOOLS FOR STARTING UP AND PRACTICING PHILANTHROPY IN AN INTENTIONAL SPACE WITH OTHERS.

### LEARNING OBJECTIVES:

- » TO PROVIDE A HANDS-ON EXPERIENCE OF WHAT COLLECTIVE GIVING IS AND CAN BE
- » TO DEMONSTRATE TOOLS FOR STARTING UP AND WORKING WITHIN A GIVING CIRCLE OR OTHER COLLECTIVE PROCESS
- » TO ENGAGE PARTICIPANTS AROUND THE COMMUNITY-BASED VALUES AT WORK WITHIN COLLECTIVE GIVING PRACTICES

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a brief example of when asking for help led to a better outcome in a situation or crisis. To begin, the facilitator should model an introduction and example.

#### ACTIVITY: Philanthropy Word Walk

**PURPOSE:** To provide participants the opportunity to broaden their thoughts about philanthropy and provide context for giving circles in the landscape of philanthropy

**PROCESS:** The facilitator writes various definitions of philanthropy on flip chart paper and posts them around the room, then asks participants to walk around the room and stand near the definition that resonates with them. This is followed with a group discussion.

### PRESENTATION: Community Philanthropy

**WORKSHEET:** A Giving Circle – Step by Step

**PURPOSE:** To share history and context with the participants of the cultural basis for collective giving practices and present modern day strategies that can be implemented to mirror shared community values

**PROCESS:** Facilitator presents the history, context and value of giving circles to the group, providing space for questions and discussion as appropriate. Data sources for history can be found in Resource section.

#### GUIDING QUESTIONS:

- » What has collective giving looked like over the years? In the different communities? In immigrant communities?
- » What were motivations for pooling resources and sharing decision-making?
- » What values are upheld through collective giving strategies?
- » What strategies that we use today, formally and informally, are informed by community values?

# QUICK START RESOURCES

**WEBSITE:** [www.givingcircles.org](http://www.givingcircles.org)

**REPORT:** *More Giving Together: The Growth and Impact of Giving Circles and Shared Giving* by Jessica Berman for the Forum of Regional Associations of Grantmakers, 2008. Available for download from [www.givingforum.org/s\\_forum/sec.asp?CID=611&DID=2661](http://www.givingforum.org/s_forum/sec.asp?CID=611&DID=2661)

## ACTIVITY: I Drew a Circle

**WORKSHEET:** I Drew a Circle

**PURPOSE:** To allow the group to tap into its shared creativity to design a possible collective giving structure and examine the components involved to put it into practice

**PROCESS:** The facilitator splits the participants into small groups of at least four and hands out a scenario to each of them. Each group can either receive the same scenario or work with different ones. In small groups, the participants then get to decide how they will come together to practice collective giving under the parameters of the scenario. After at least 20 minutes in the groups, the facilitator reconvenes everyone for report backs and group discussion around process. Key elements to identify are: (a) strategy, (b) steps, (c) who is involved, (d) decision making, and (e) how funds will be pooled. Participants can be encouraged to pose questions to other groups as they present.

## ACTIVITY: Finding the Values

**WORKSHEET:** Principles of Social Change Philanthropy

**PURPOSE:** To explore collective giving which, in its many forms, often mirrors values of transparency and accountability, among others, that are also key principles of social change philanthropy

**PROCESS:** On flip chart paper posted on the wall, the facilitator writes each principle listed on the Principles of Social Change Philanthropy worksheet – one per sheet. After handing out the worksheet to the participants, the facilitator asks for examples of collective giving practices that model and/or mirror each of the listed principles. The facilitator contributes to the lists if ideas are not offered by the participants. The activity ends with the facilitator speaking to how these values and practices connect to a practice of social change philanthropy and the important role these approaches can offer to donors of color seeking to support change and greater equity through their giving.

**IDEA:** One way to tie this activity to the “I Drew a Circle...” activity is to take examples that came up in the report backs and ask the group which principles they might be connected to.

## SHARING STORIES: The Practice of Collective Giving

**PURPOSE:** To share stories of how local donors are practicing and engaging in community-based and collective giving as well as provide participants an opportunity to learn from the successes and challenges these donors have faced

**PROCESS:** Invite two to three representatives of collective giving groups (donor circles, etc.) in the local community to come speak to the group about their practice and process. After a short presentation from each presenter, the facilitator asks the participants to split up into smaller groups to have more intimate conversations led by each of presenters. This provides a space for participants to engage in a question and answer period specific to a model that resonates with their current interest and/or experience.

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator’s Guide.

# MODULE EIGHT

## DOES MY GIVING MATTER: Understanding the Impact of

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WHEN WE INVEST OUR TIME, TALENT, AND TREASURE, WE HAVE SOME EXPECTATIONS, REALISTIC AND UNREALISTIC, ABOUT WHAT WILL HAPPEN. THIS MODULE PROVIDES PARTICIPANTS THE OPPORTUNITY TO REFLECT ON WHETHER THEIR INVESTMENT MAKES THEM A COMMUNITY ALLY OR GATEKEEPER.

### LEARNING OBJECTIVES:

- » TO IDENTIFY PERSONAL AND COMMUNITY REASONS TO ENGAGE IN PHILANTHROPY
- » TO CLARIFY PERSONAL EXPECTATIONS CONNECTED TO THE VARIOUS WAYS WE GIVE
- » TO DEVELOP STRATEGIES TO BE A STRONG COMMUNITY ALLY AND PARTNER THROUGH GIVING PRACTICES

### AGENDA

Welcome and introductions

### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and share a brief story of a gift they made that still brings them joy.

### ACTIVITY: Money Bingo

**WORKSHEET:** Money Bingo cards

**PURPOSE:** To facilitate an entrée into the conversations of money, class and privilege and explore the ways our experiences of them may influence the ways we give of our time, talent and treasure

**PROCESS:** The facilitator hands out Money Bingo cards, one per participant, and asks everyone to go around the room to ask the other participants if a given statement is correct for them. If the answer is yes, the person's name is put in that box. Try to encourage participants to get as many names as possible.

At a point when most people have "won" by filling in one or more rows, the facilitator brings the group back together to reflect on the activity and explore how money and privilege often connect with the tools and strategies we use for giving.

### GUIDING QUESTIONS:

- » Were there statements you were hesitant to ask? If so, which ones and why?
- » Were there statements you were asked about by several people? If so, why do you think that is?
- » Which statements spoke to your personal experience with money, class and/or privilege?
- » Can you identify ways in which your experiences with money and privilege (or not) influence the ways you give?

# QUICK START RESOURCES

**WEBSITE:** [www.justphilanthropy.org](http://www.justphilanthropy.org)

**BOOK:** *Classified: How to Stop Hiding Your Privilege and Use It for Social Change*, by Karen Pittelman and Resource Generation, at [www.classifiedbook.com](http://www.classifiedbook.com)

## My Giving

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### **PRESENTATION: The Rewards of the Gift**

**PURPOSE:** To help participants uncover the rewards and benefits they seek as donors/givers

**PROCESS:** Through presentation, the facilitator discusses the role that expectations play in our giving and explores how to identify realistic and unrealistic expectations. Included in the discussion is an exploration of personal rewards (psychic rewards) that also come with giving.

**KEY POINTS TO ADDRESS ARE:**

- » Horizontal (mutual) philanthropy/ giving & vertical (top-down) philanthropy: How does power play out differently in the two approaches?
- » Feeling vs. strategy: What might this look like in terms of a gift? How does this influence how and where we give?
- » Rescue vs. partnership: What are ways to develop trust in a giving relationship?
- » Immediate relief vs. long-term change: What are the timelines for "impact" that you place on a gift?
- » Serving on a board: What types of expectations and rewards do this practice of giving of time and talent provide?

### **CONVERSATION: To Give or Not to Give?**

**PURPOSE:** To elicit group knowledge about donor experiences and develop a deeper understanding of personal motivations and expectations of what we give

**PROCESS:** In small groups, the facilitator asks participants to brainstorm a list of why they have given and why they may have chosen not to give at any point of their time, talent and/or treasure.

In the full group report backs, the facilitator asks the group what they were hoping to achieve with the gifts they did make and how they were able to determine if their gift had the desired impact.

### **SHARING STORIES: Becoming a Community Ally**

**WORKSHEET:** Being a Community Ally

**PURPOSE:** To share stories and engage with local community members about the practice of being a donor and explore strategies for understanding if the gift is having an impact

**PROCESS:** This panel is made up of two donors (including one who gives as a board member) and two representatives from local community organizations. The facilitator moderates a conversation between the four panelists about their experiences of giving and receiving. Each panelist shares his/her own journey and provides tips for workshop participants on how to be an effective community ally through their giving. The conversation includes a question and answer session with participants.

The facilitator hands out the Being a Community Ally worksheet to complement the discussion after the panelists' presentations.

### **CLOSING & EVALUATION**

Please see the Closing & Evaluation section of the Facilitator's Guide.

# MODULE NINE

## BEYOND THE GIFT: Identifying Your Value Added

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GIVING IS MORE THAN WRITING A CHECK OR SERVING ON A BOARD. AS INDIVIDUALS, WE HAVE ACCESS TO RESOURCES THAT WE MAY NOT ALWAYS CONSIDER WHEN WE THINK ABOUT WHAT WE CAN GIVE. THIS MODULE HELPS PARTICIPANTS IDENTIFY THESE AREAS IN THEIR LIVES AND HOW TO LEVERAGE THEM TO INCREASE THE IMPACT AND VALUE OF THE GIFTS THEY ALREADY GIVE.

### LEARNING OBJECTIVES:

- » TO EXPAND AND DEEPEN UNDERSTANDING OF HOW THE GIVING OF TIME AND TALENT INTEGRATES INTO THE PRACTICE OF PHILANTHROPY
- » TO PROVIDE STRATEGIES AND EXAMPLES OF HOW TO DEEPEN THE PHILANTHROPIC PRACTICE
- » TO IDENTIFY SOCIAL CAPITAL AND DEVELOP AN ACTION PLAN FOR CONNECTING RELATIONSHIPS TO CURRENT GIVING STRATEGIES

### AGENDA

Welcome and introductions

#### ACTIVITY: Opening

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and briefly share something that they like to receive, other than money or a thing, from someone who is not necessarily a close friend or family member. To begin, the facilitator should model an introduction and example, such as receiving a “thank you” when you hold open a door for someone leaving a building after you.

#### ACTIVITY: Group Brainstorm

**PURPOSE:** To surface the knowledge and experience of the participants in the room

**PROCESS:** In the full group, the facilitator leads a group brainstorm about the different ways folks are giving and sharing, other than financially. Ideas can be captured on flip chart paper and posted on the walls to be accessible for the remainder of the workshop.

### PRESENTATION: Defining Our Language

**PURPOSE:** To offer a quick overview of definitions and words that will be used in the workshop and provide context for assessing and accessing social capital

**PROCESS:** The facilitator throws out the following words to the group and asks for definitions.

**WORDS:**

Access  
Privilege  
Social capital  
Relationships  
Leverage  
Value added

This process often segues into to a larger group discussion. At this point, the facilitator shares with the group several established definitions of social capital and leads the discussion around these.

**POSSIBLE GUIDING QUESTIONS:**

- » Who has social capital? Can we make more of it? Can we lose it?
- » How is social capital related to giving?
- » How do you build social capital?
- » How can we leverage privilege and access as forms of giving?

# QUICK START RESOURCES

**ESSAY:** "Bowling Alone: The Collapse and Revival of American Community, at [www.bowlingalone.com](http://www.bowlingalone.com)

**WEBSITE:** The Saguaro Seminar Social Change Primer [www.ksg.harvard.edu/saguaro/primer.htm](http://www.ksg.harvard.edu/saguaro/primer.htm)

## ACTIVITY: We Are Our Relationships

**WORKSHEET:** Circles of Influence

**PURPOSE:** To tangibly identify relationships and connections in the participants' lives and help them articulate ways they may be able to leverage these relationships for creating change

**PROCESS:** Using the Circles of Influence worksheet, the facilitator asks participants to first identify a goal they consider when giving time, talent and treasure and then to start filling out the worksheet circles with names of folks they know and have access to. Once the group has completed the worksheet, the facilitator asks the group to break into dyads to discuss the activity and then reconvenes the group for a full group discussion.

**POSSIBLE GUIDING QUESTIONS:**

- » Were there any surprises for you as you completed this worksheet?
- » Who are we in relationship with and why? What drives our relationships?
- » How can we build authentic relationships while recognizing our relationships as social capital?
- » How can we encourage resource sharing, rather than dependency, in our various relationships?
- » How does our identity/experience as people of color influence the areas of access/social capital/relationships?
- » Where and how can these relationships help us meet our giving goals?

## ACTIVITY: Action Planning

**PURPOSE:** To facilitate the development of action plans for participants to leverage and use their access and social capital to supplement and deepen their current giving practices

**PROCESS:** In small groups of two to three, the facilitator asks participants to brainstorm ways to invest and leverage their social capital (know how, relationships, etc.) in ways that are connected to their current giving goals. After at least 10 minutes, the facilitator reconvenes the participants for a report back and presentation of creative ideas and strategies. The facilitator closes with asking each participant to share with the group at least one action step he/she will take after leaving the workshop.

## CLOSING & EVALUATION

Please see the Closing & Evaluation section of the Facilitator's Guide.

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# MODULE TEN

## OUR HISTORY OF GIVING: The Story of Philanthropy in

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**THIS MODULE PROVIDES AN HISTORICAL PERSPECTIVE OF HOW PHILANTHROPY HAS BEEN OPERATING IN THE U.S., BOTH FORMALLY AND INFORMALLY. SPECIFIC DISCUSSION LOOKS AT HOW IMMIGRANT AND COMMUNITIES OF COLOR HAVE INTEGRATED THE PRACTICE OF SELF-HELP AND MUTUAL AID SOCIETIES INTO THEIR DAY-TO-DAY LIVES.**

### **LEARNING OBJECTIVES:**

- » TO EXAMINE A SHARED HISTORY OF PHILANTHROPY AND GIVING IN THE UNITED STATES
- » TO UNDERSTAND HOW EXTERNAL REALITIES INFLUENCE THE PRACTICE OF PHILANTHROPY AT BOTH A MICRO AND MACRO LEVEL
- » TO HELP SITUATE PERSONAL GIVING IN A BROADER CONTEXT AND DEVELOP STRATEGIES FOR MORE EFFECTIVE GIVING

### **AGENDA**

Welcome and introductions

#### **ACTIVITY: Opening**

**PURPOSE:** To initiate team building within the group and identify for the facilitator where participants are entering into the discussion about giving

**PROCESS:** The facilitator asks participants to introduce themselves and think of a film or TV show they have seen that showed philanthropy at work in the United States. To begin, the facilitator should model an introduction and example.

#### **ACTIVITY: Philanthropy Timeline**

**WORKSHEET:** Timeline of Philanthropy

**PURPOSE:** To develop a collective timeline with the group on flip chart paper on the wall to garner the group knowledge about the prominent and not so prominent histories of giving

**PROCESS:** The facilitator asks participants to fill out the timeline posted on the wall on several, taped-together sheets of flip chart paper. Each participant is asked to contribute key points and/or periods in history that they know about that relate to:

- » Formal U.S./American philanthropy (ex. Founding of the Carnegie Foundation)
- » Informal giving practices (ex. During time of war)
- » Philanthropy within ethnic, immigrant and/or tribal communities (ex. Chinese community during California Gold Rush)
- » Mass movements of giving (ex. Southeast Asian tsunami)

The facilitator can contribute to the timelines as well. Once the timeline is completed, the facilitator leads the group in a reflective discussion about the process, what shows up on the timelines, what themes emerge and who the key players are.

#### **POSSIBLE GUIDING QUESTIONS:**

- » What themes do you see emerging?
- » What didn't get put up on the timeline? What do you feel is missing?
- » Who defines "philanthropy"?
- » Where do you see points of a shared history of giving?
- » What has been the motivation and role of giving in communities of color based on this timeline?
- » Where do you see the disconnects between formal and informal philanthropy?

# QUICK START RESOURCES

**WEBSITE:** "History of Philanthropy" by the National Philanthropic Trust, [www.nptrust.org/philanthropy/history\\_philanthropy.asp](http://www.nptrust.org/philanthropy/history_philanthropy.asp)

**WEBSITE:** The Future of Philanthropy Project, [www.futureofphilanthropy.org](http://www.futureofphilanthropy.org)  
The report, "Looking Out for the Future: An Orientation for Twenty-First Century Philanthropist" by Katherine Fulton and Andrew Blau, is available for download.

## the United States

**GROUP DISCUSSION:** What didn't get put up on the timeline? What is still missing? Who defines "philanthropy"?

### **CONTENT SHARING: Traditions of American Philanthropy**

**PURPOSE:** To share and explore the different threads of philanthropic practice at work in the United States today and demonstrate how philanthropy has developed out of several realities, such as the success of capitalism for a small White elite (Rockefeller, Ford, etc.), cultural practices of immigrant and forced (slavery, indentured servitude) communities, and need (such as during the Great Depression, WWII, etc.)

**PRACTICE:** Using articles suggested in the Resource Section (or any others that provide appropriate historical context for the participants), the facilitator leads a discussion with the group about the history of philanthropy and the different trends that have emerged. It is important to discuss the trends within a broader historical context (slavery, "manifest destiny", the California Gold Rush, Vietnam War, etc.) as well as explore ways that certain traditions are considered more "valuable" than others in the broader U.S. context.

**CERTAIN TRADITIONS TO COVER ARE:**

- » Philanthropy as relief
- » Philanthropy as improvement
- » Philanthropy as social reform
- » Philanthropy as survival  
(Community and/or individual)

### **ACTIVITY: Finding Our Place in the History**

**PURPOSE:** For participants to explore an active role in strengthening and/or shifting current philanthropic trends, based on their giving practices and values

**PRACTICE:** In small groups of three to four, the participants brainstorm strategies they can employ to create the "next chapter" in philanthropy. The facilitator can provide the groups with guiding questions. The facilitator reconvenes the group to discuss and share personal action steps folks may have identified for themselves in this activity.

**POSSIBLE GUIDING QUESTIONS:**

- » What role do you want your giving to have in light of our collective giving history?
- » What is needed to strengthen/shift giving trends that are supporting communities of color?
- » How has your idea of giving shifted as a result of these discussions?
- » If we were to reconvene in five years, what would you like to be able to ADD to the timeline?

### **CLOSING & EVALUATION**

Please see the Closing & Evaluation section of the Facilitator's Guide.

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# EDG RESOURCE

THE EDG MODULES, BUILT IN PARTNERSHIP WITH A NUMBER OF OTHER ORGANIZATIONS, INCORPORATE THE RESEARCH AND PRACTICES THAT SUPPORT THE DIVERSITY WITHIN PHILANTHROPY. THE FOLLOWING GUIDE PROVIDES ADDITIONAL INFORMATION ON CONTENT DELIVERY AND WORKSHOP IMPLEMENTATION. FOR SUPPORT BEYOND THIS GUIDE, PLEASE VISIT CHANGEMAKERS AT [WWW.CHANGEMAKERS.ORG](http://WWW.CHANGEMAKERS.ORG).

## PHILANTHROPY & GIVING STATISTICS

According to Giving USA, in 2006, total giving in the U.S. reached just under \$300 billion, and by 2050 it is estimated that giving will exceed \$6 trillion.

### OF THIS AMOUNT:

- » Individuals giving made up just over 2/3 of those gifts; however, if adding in bequests, individuals give over 80% of charitable gifts each year.
- » People give to what they believe in: 32.8% is giving to churches, 13.9% to education, 16.9% to health and human services, 4.2% to arts, culture and humanities organizations, and 3.8% internationally.
- » Non-cash giving is on the rise, especially by individuals of higher net worth and those over 45 years old.
- » Formally, 89% of U.S. households give. Informal giving, however, is not tracked.
- » Fifty-five percent of Americans report that they volunteer time and talent.
- » Donor Advised Funds are the fastest growing charitable giving vehicle for individuals and families.

For more details and numbers, the following organizations provide comprehensive research on giving:

### Center on Philanthropy at Indiana University

[http://www.philanthropy.iupui.edu/Research/giving\\_fundraising\\_research.aspx](http://www.philanthropy.iupui.edu/Research/giving_fundraising_research.aspx)

### Giving USA

[www.givingusa.org](http://www.givingusa.org)

### National Philanthropic Trust

[http://www.nptrust.org/philanthropy/philanthropy\\_stats.asp](http://www.nptrust.org/philanthropy/philanthropy_stats.asp)

Specifically for people of color, far less research has been compiled. The general giving statistics have rarely been broken down by ethnicity. Key statistics can be found through the following resources:

### Asian Pacific Americans in Philanthropy – AAPIP

[www.aapip.org](http://www.aapip.org)

### Council on Foundations

PUBLICATION: **Cultures of Caring**  
[www.cof.org](http://www.cof.org)

### Donors Forum

[www.donorsforum.org](http://www.donorsforum.org)

### Generous Giving

[www.generousgiving.org](http://www.generousgiving.org)

### Hispanics in Philanthropy

[www.hiponline.org](http://www.hiponline.org)

### National Black United Fund

[www.nbuf.org](http://www.nbuf.org)

### Native Americans in Philanthropy

[www.nativephilanthropy.org](http://www.nativephilanthropy.org)

### The Forum of Regional Associations of Grantmakers

[www.givingforum.org](http://www.givingforum.org)

### Twenty-First Century Foundation

[www.21cf.org](http://www.21cf.org)

## RESOURCES ON MONEY & INCOME

Identifying income, spending, giving and saving practices within and for communities of color is useful information when developing relevant content to use with the EDG modules. Several reports and books have been critical tools and may be useful to your implementation of this curriculum.

REPORT: "Short Changed: Foundation Giving and Communities of Color" by Will Pittz and Rinku Sen, Applied Research Center ([www.arc.org/content/view/271/48/](http://www.arc.org/content/view/271/48/))

REPORT: "Investing in a Diverse Democracy: Foundation Giving to Minority-Led Nonprofits," by the Greenlining Institute ([www.greenlining.org](http://www.greenlining.org))

REPORT: "Fairness in Philanthropy Part 1 and 2: Foundation Giving to Minority-Led Nonprofits" by the Greenlining Institute ([www.greenlining.org](http://www.greenlining.org))

BOOK: "The Color of Wealth: The Story Behind the U.S. Racial Wealth Divide" by Meizhu Lui, Barbara Robles, Betsey Leondar-Wright, United for a Fair Economy ([www.faireconomy.org/books](http://www.faireconomy.org/books))

## NCGives VIDEO

Recently, North Carolina Gives (NCGives) put together a short video that shares personal stories of giving among a wide and diverse range of individuals. This video, about seven minutes in length, can be a useful tool to inspire dialogue and storytelling among EDG workshop participants.

TO OBTAIN A COPY, PLEASE CONTACT:

Darryl Lester, HindSight Consulting  
[www.hindsightconsulting.org](http://www.hindsightconsulting.org)

## DEFINITIONS OF PHILANTHROPY

Philanthropy, from an etymological point of view, is a theoretical practice embarked on because of a love of human kind; however, in real practice, it is perceived

# GUIDE

in a variety of ways. Definitions of philanthropy can range from an altruistic giving of time and money to support all people, believing that all are equal and share equal needs, to a practice that encourages an economic status quo, asking the poor (powerless) to beg for resources from the rich (powerful). At the extremes, these definitions are based on stereotypes and assumptions that prevent both donor and recipient from engaging together in a partnered relationship. Social change philanthropy and community-based philanthropy are two strategies that many donors and foundations have embraced as a way to impart equity into the giving practice.

For a more detailed discussion on social change philanthropy and community-based philanthropy, visit Changemakers [www.changemakers.org](http://www.changemakers.org).

## DEFINITIONS OF SOCIAL CAPITAL

How social capital is defined, where it comes from and how it is used have been topics of debate in many arenas; however, what all agree upon is that it refers to connections within and between social networks. This is based on the belief that social networks — who we know and how we know them — hold value in our personal and professional interactions.

Specific definitions, including detailed explanations, can be found in the following resources:

- » Robert D. Putnam's essay, *Bowling Alone: The Collapse and Revival of American Community*, at <http://www.bowlingalone.com>
- » The Saguaro Seminar Social Capital Primer, <http://www.ksg.harvard.edu/saguaro/primer.htm> has a good working definition of the term social capital as well as a number of examples.

## RESOURCES ON SOCIAL CHANGE PHILANTHROPY

**Social Justice Philanthropy: An Overview**, by the Synergos Institute, written by Aileen Shaw, 2002. This report details the differences between social justice and traditional philanthropy, as well as going in depth about the practice and impact of social justice philanthropy. [www.synergos.org/knowledge/02/socialjusticeoverview.pdf](http://www.synergos.org/knowledge/02/socialjusticeoverview.pdf)

**JustPhilanthropy.org**: Social Justice Philanthropy and Racial Equity [www.justphilanthropy.org](http://www.justphilanthropy.org)

**Third Wave Social Justice Philanthropy: How Young Donors Are Changing the Face of Philanthropy**, written by Laura Wernick, University of Michigan, Ann Arbor, 2007. This paper explores an emerging movement of young people with wealth who are leveraging their access to align their resources and privilege to support social justice philanthropy. <http://arnova.omnibooksonline.com/2006/data/papers/PA061262.pdf>

**Social Change Philanthropy and How It's Done**, by Alison Goldberg, Foundation News and Commentary, 2002. This article is a hands-on resource that explores how foundations and donors are supporting social change efforts in community. <http://www.foundationnews.org/CME/article.cfm?ID=1982>

**Women, Philanthropy and Social Change: Visions of a Just Society**. Edited by Elayne Clift, University Press, New England. This book explores the practice of social justice philanthropy that is led by women in the U.S. and around the globe.

## RESOURCES ON DONOR CIRCLES

**Minnesota Toolkit for Giving** provides 10 steps for starting a giving circle, along with various other resources for other types of giving. <http://www.minnesotagiving.org/options/circle.htm>

**Giving Circles Network** provides statistics and a way for circles to connect across the country.

[www.givingcircles.org](http://www.givingcircles.org)

### Tactical Philanthropy - Chronicling the Second Great Wave of Philanthropy.

In addition to discussions of giving and financial trends, the blog explores the rise and import of giving circles.

<http://tacticalphilanthropy.com/2006/12/giving-circles>

**More Giving Together: The Growth and Impact of Giving Circles and Shared Giving** by Jessica E. Bearman for the Forum of Regional Associations of Grantmakers, 2008.

The report can be downloaded from: [http://www.givingforum.org/s\\_forum/sec.asp?CID=611&DID=2661](http://www.givingforum.org/s_forum/sec.asp?CID=611&DID=2661)

## HISTORY OF PHILANTHROPY

The following articles, reports and websites can provide useful stories related to the history and practice of philanthropy in the United States.

ARTICLE: "An Abbreviated History of the Philanthropic Tradition in the United States" by the Council on Foundations (<http://www.cof.org/Learn/content.cfm?ItemNumber=730>)

BOOK: "Remaking America: How the Benevolent Traditions of Many Cultures Are Transforming our National Life" by James A. Joseph. Copies can be obtained through the Council on Foundations ([www.cof.org](http://www.cof.org)).

REPORT: "Cultures of Caring," by various, Council on Foundations (<http://www.cof.org/learn/content.cfm?itemnumber=842>)

WEBSITE: "History of Philanthropy" by National Philanthropic Trust (<http://www.nptrust.org/philanthropy/history-philanthropy.asp>)

WEBSITE: The Giving Forum ([www.givingforum.org](http://www.givingforum.org)) provides additional resources and history on rural philanthropy; giving circles; and racial, ethnic and tribal philanthropy.

# ADDITIONAL RESOURCES & PARTNER ORGANIZATIONS

## DONOR EDUCATION, SUPPORT & NETWORKING ORGANIZATIONS

### Changemakers

www.changemakers.org  
605 Market Street, Suite 1109  
San Francisco, CA 94105  
415/543-2363

A public foundation providing grants, donor education programs and advocacy that promote social justice philanthropy and community-based giving.

### Community Investment Network

www.thecommunityinvestment.org  
2205 Up Above Lane  
Raleigh, NC 27614  
919/792-2442

A community-based philanthropic organization that provides civic engagement and donor education strategies for individuals and organizations engaged in collective giving.

### Financially Literate Youth (FLY)

www.flyadventures.com  
223 State Street  
Traverse City, MI 49686  
231/995-0750

FLY teaches values-based financial literacy to children three to eight years old. FLY uniquely integrates financial education with character education to provide children and youth a lasting foundation for making responsible and fulfilling financial choices.

### Grantmakers without Borders

www.internationaldonors.org  
P.O. Box 181282  
Boston, MA 02118  
617/794-2253

A network of individual donors and people working with foundations, who share a common desire to expand and enrich progressive international philanthropy.

### Grassroots Grantmakers

www.grassrootsgrantmakers.org  
P.O. Box G  
Hallettsville, TX 77964  
361/798-1808

Grassroots grantmakers is a membership network of funders that address local priorities, value civic engagement, and build community to strengthen and connect residents where they live.

### HindSight Consulting, Inc.

www.hindsightconsulting.org  
2205 Up Above Lane  
Raleigh, NC 27614  
919/604-0745

Hindsight Consulting provides tools, strategic thinking, and knowledge management for neighborhood groups, community-based organizations and philanthropic institutions to assist them in building communities by design.

### National Center for Family Philanthropy

www.ncfp.org  
1818 N Street NW, Suite 300  
Washington, DC 20036  
202/293-3424

A national resource center focusing on matters of importance to families engaged in philanthropy. NCFP provides research, education materials and programs.

### NC Gives

www.ncgives.org  
4601 Six Forks Rd. Suite 524  
Raleigh, NC 27609  
919/256-6908

NCGives seeks to celebrate, connect, inspire and grow the giving of time, talent and treasure in North Carolina by sharing stories, models and tools, particularly among communities of color, women and young people.

### Philanthropy Incubator

www.philanthropy.iupui.edu/  
philanthropy\_incubator.html

A Program of the Center on Philanthropy at Indiana University  
550 W. North St., Suite 301  
Indianapolis, IN 46202-3272  
317/274-4200

### Silicon Valley Office:

650/354.1601

Provides workshops and special programs for its membership of individual donors and foundations, as well as one-on-one coaching, mentoring, and referrals to experts in the field of philanthropy.

### Resource Generation

www.resourcegeneration.org  
218 E. 18th Street  
New York, NY 10003

Resource Generation is a national organization that works with young people with financial wealth who are supporting and challenging each other to effect progressive social change through the creative, responsible and strategic use of financial and other resources. Resource Generation builds cross-class alliances with people and organizations working for social, racial and economic justice.

### Responsible Wealth

www.responsiblewealth.org  
29 Winter Street  
Boston, MA 02108  
617/423-2148

A national network of businesspeople, investors and affluent Americans who are concerned about the trends of deepening economic inequality.

### Social Justice Fund Northwest

www.socialjusticefund.org  
603 Stewart Street, Suite 1007  
Seattle, WA 98101  
206/624-4081

An organization dedicated to addressing the root causes of social, economic, and environmental inequities. Each year, Social Justice Fund NW raises funds from its members and friends and then grants that money to non-profit social justice organizations in the Northwest and Northern Rockies.

### Tides Foundation

http://www.tides.org/tides-foundation  
The Presidio, P.O. Box 29198  
San Francisco, CA 94129  
415/561.6400

The Tides Foundation partners with donors to increase and organize resources for positive social change.

### United for a Fair Economy

www.faireconomy.org  
29 Winter Street  
Boston, MA 02108  
617/423-2148

United for a Fair Economy is a national, independent, nonpartisan, 501(c)(3) non-profit organization. UFE raises awareness that concentrated wealth and power undermine the economy, corrupt democracy, deepen the racial divide, and tear communities apart. They support and help build social movements for greater equality.

### **Women Donors Network**

www.womendonors.org  
1170 Hamilton Court  
Menlo Park, CA 94025  
650/833.6750

A national peer network of women who donate at least \$25,000 per year to progressive non-profits. Offers annual and regional conferences, publications, and donor and study circles.

## **FAITH-BASED PHILANTHROPY**

### **Bartimaeus Cooperative Ministries**

www.bcm-net.org  
P.O. Box 328  
Oak View, CA 93022  
805/649-1327

A circle of mutual-aid for non-traditional gospel ministry. The organization works in the following areas: Theological animation, restorative justice, and moving money for social change.

### **Jewish Funds for Justice**

www.jewishjustice.org  
330 7th Avenue, Suite 1902  
New York, NY 10001  
212/213-2113

Created by a recent merger of the Jewish Fund for Justice and the Shefa Fund, this national foundation is focused on combating the causes and consequences of poverty through grantmaking and donor education and services for progressive Jewish donors.

### **Ministry of Money**

www.ministryofmoney.org  
11315 Neelsville Church Rd.  
Germantown, Maryland 20876  
301/428.9560

A Christian ministry that encourages all persons to become free from their attachment to cultural values regarding money and to live out joyfully God's call for their lives and resources.

## **RESEARCH & ADVOCACY**

### **JustPhilanthropy.org**

www.justphilanthropy.org  
45 University Avenue SE, # 706  
Minneapolis, MN 55414  
612/724-0351

JustPhilanthropy.org presents six pathways to focus philanthropy on racial equity and social justice, along with promising practices, examples from the field, and many additional resources.

### **National Committee for Responsive Philanthropy**

www.ncrp.org  
2001 S Street NW, Suite 620  
Washington, DC 20009  
202/387-9177

Seeks to make philanthropy more responsive to socially, economically and politically disenfranchised people. NCRP promotes public accountability and accessibility in philanthropy.

### **Forum of Regional Associations of Grantmakers: Racial, Ethnic and Tribal Philanthropy Knowledge Center**

www.givingforum.org/retphilanthropy  
1111 19th Street, NW, Suite 650  
Washington, DC 20036  
202/467-1123

The Knowledge Center provides information on the giving in racial, ethnic and tribal communities and how it differs from other types of charitable giving, along with the benefits of racial, ethnic, tribal funds to the community, donors, charitable organizations and foundations that host them. Research, statistics and links to organizations supporting this area of philanthropy are included.

## **WORKPLACE GIVING**

### **Our Giving Community**

www.ourgivingcommunity.org  
P.O. Box 4572  
Portland, ME 04112-4572  
207/761-1110

Connects employers and employees with new local choices for workplace charitable giving. Our Giving Community (formerly National Alliance for Choice in Giving) represents over 55 charitable federations and funds nationwide (the alternative "United Way") that in turn support over 1,500 non-profits dedicated to positive social and environmental change.

## **BOOKS & PUBLICATIONS**

### **Alliance Magazine.**

Craig, Gary.  
Delivering Social Justice through Philanthropy.  
www.alliancemagazine.org/free/html/jun05f.html

### **More Than Money Journal.**

Money Changes Everything... or does it?  
Spring 2002. Issue Number 29.  
www.morethanmoney.org

### **The 10 Lenses – Your Guide to Living & Working in a Multicultural World.**

Williams, Mark A.  
Capital Books, Inc. 2001

### **On the Brink of New Promise – The Future of U.S. Community Foundations.**

Bernholz, Lucy, Fulton, Katherine, and Casper, Gabriel.  
Blue Print Research and Design, Inc and Monitor Institute. 2005  
www.communityphilanthropy.org

### **Giving – How Each of Us Can Change the World.**

Clinton, Bill.  
Alfred A. Knopf, 2007,  
http://www.randomhouse.com/catalog/display.pperl?isbn=9780307266743

### **Robin Hood Was Right: A Guide to Giving Your Money for Social Change.**

by Chuck Collins and Pam Rogers with Joan P. Garner  
W.W. Norton & Co., 2001.  
www.wwnorton.com/catalog/fall00/032085.htm

### **Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy (3rd edition).**

Gary, Tracy with Nancy Adess.  
Jossey-Bass Publishers, 2007.  
www.josseybass.com

### **Creating Change through Family Philanthropy.**

Goldberg, Alison and Karen Pittelman with Resource Generation.  
Brooklyn: Soft Skull Press, 2007.  
www.changephilanthropy.org

### **Classified: How to Stop Hiding Your Privilege and Use It for Social Change.**

Pittelman, Karen and Resource Generation  
Brooklyn: Soft Skull Press, 2005  
www.classifiedbook.com

### **Soul of a Citizen – Living with Conviction in a Cynical Time.**

Loeb, Paul Rogat.  
St. Martin's Press, 1999.  
www.soulofacitizen.org

### **Legacy and Innovation: A Guidebook for Families on Social Change Philanthropy.**

Yang, Stephanie and Changemakers.  
San Francisco, Changemakers, 2007.  
www.changemakers.org

# EDG

# CREDITS

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**PROJECT EVALUATOR:**

**jdcPartnerships**

**ADVISORY BOARD:**

**Sonya Garcia-Ulibarri**

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**Priscilla Hung**

Grassroots Institute for  
Fundraising Training(GIFT)  
Oakland, CA

**DEVELOPED & WRITTEN BY:**

**Darryl Lester**

HindSight Consulting  
[www.hindsightconsulting.com](http://www.hindsightconsulting.com)

**Stephanie Yang**

Changemakers (former Director of  
Programs; currently of SYD Consulting)  
[www.syd-consulting.com](http://www.syd-consulting.com)

**EDITED BY:**

**Maureen Sansing**

**DESIGN BY:**

**Ian Hewitt-Woods**

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

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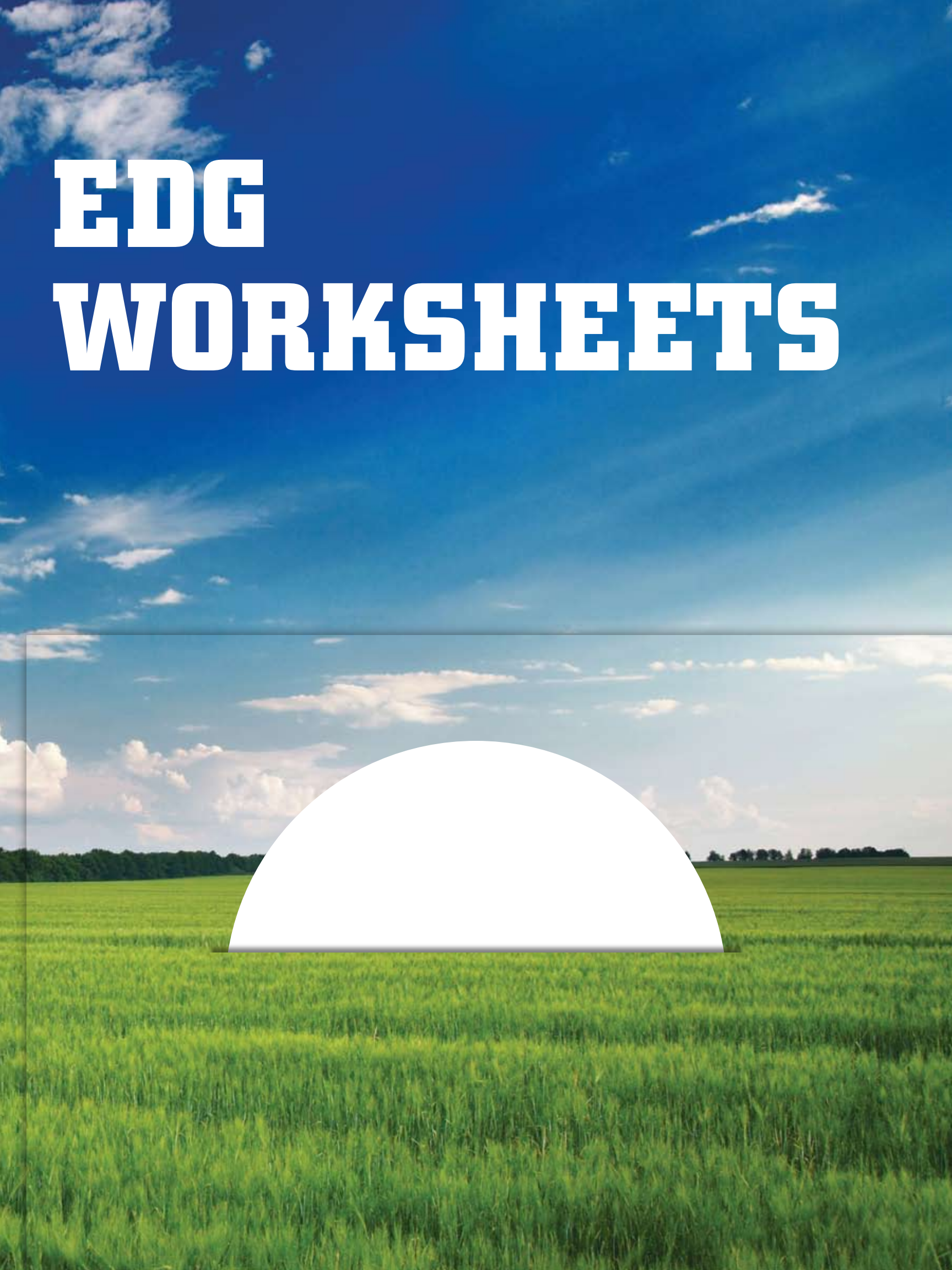
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