

# The Transformative Philanthropy Workbook

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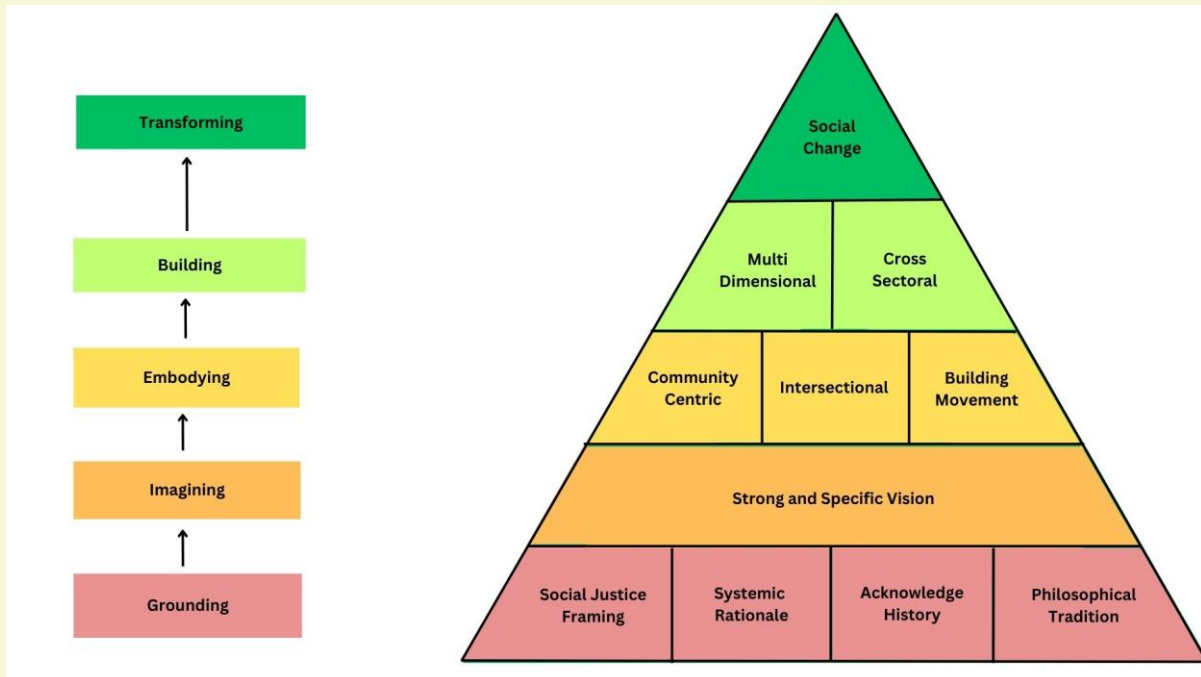


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## Introduction

In the 'Manual for Social Change' a new model of **Transformative Philanthropy** has been developed which sets out a process for facilitating social change. This workbook aims to translate the key elements listed into practical actions for foundations committed to this movement.



The four building blocks – grounding, imagining, embodying and building – all take us to the place of transformation. Within this workbook, questions are provided to assist you as a Foundation to set your ambitions with a firm rationale but a strong vision.

- Each step provides some questions to provoke discussion together with a comprehensive reading list and suggested actions.
- It is important to note that the phases and 'ingredients' listed above are not **definitive, linear or siloed**. Think of them more as pieces of a jigsaw which interlock and connect to build a picture and what that picture looks like, will vary from funder to funder.

I hope that this workbook assists both boards and teams to have constructive discussions as to your framework for philanthropy and how much of this model resonates or conflicts with your work – there are no right answers and no perfect solutions.

Good luck and do let me know if you can evolve or build on the model!

Best Wishes

Fozia Irfan

## Has Philanthropy in the UK failed?

In the Manual, a number of critiques of institutional philanthropy have been cited which have been mentioned in recent books and articles listed below.



### Discussion

- Consider the main arguments cited in the Manual as to why philanthropy is failing – to what extent do you agree or disagree and why?
- Read the quotes in the Manual;  
Vikas Maturi from Liberation ventures states that ‘philanthropy is a function of inequality’, to what extent do you agree?  
Glen Galaich from Stupski Foundation rallies against the very existence of foundations – why do you think we should we exist?
- In what ways do you think philanthropy can be harmful and is there anything in your foundation’s work, which could be seen as harmful?



### Action

- Schedule a team or board conversation to discuss philanthropy, its roots and the rationale for the existence of your foundation – create space to intentionally recognise failings of the model and ways to reconcile/address this.
- Carry out an audit or consultation to unearth any practices or principles which could be seen as harmful to those you fund.
- Map the power dynamics and relationships within your foundation and discuss how these can be minimised or eliminated – think about being open and sharing this publicly to demonstrate your recognition.



### Reading

- [Opinion | The Charitable-Industrial Complex - The New York Times \(nytimes.com\)](https://www.nytimes.com)
- <https://www.newyorker.com/magazine/2022/05/30/would-the-world-be-better-off-without-philanthropists-paul-vallely-emma-saunders-hastings>
- <https://www.philanthropyroundtable.org/almanac/common-criticisms-of-philanthropy/>
- <https://givingcompass.org/article/understanding-the-basic-critiques-of-philanthropy>
- [https://ssir.org/articles/entry/12\\_common\\_criticisms\\_of\\_philanthropyand\\_some\\_answers](https://ssir.org/articles/entry/12_common_criticisms_of_philanthropyand_some_answers)
- <https://www.theatlantic.com/technology/archive/2018/06/against-philanthropy/563834/>
- <https://cep.org/putting-critiques-in-perspective-in-pursuit-of-more-effective-philanthropy/>

## Should Philanthropy be Transformative?

A model of **Transformative Philanthropy** moves us towards social change – the improvement and thriving of individuals and communities. Many of the US funders were unapologetically ambitious in pushing for social change, through changing the ethos and methodology of philanthropy.



### Discussion

- To what extent is it important to your foundation to bring about social change and be transformative? Do you have a different purpose? Is there a consensus across the Board and team in relation to this?
- The Mastro Foundation discuss moving from transactional to relational and other funders use word such as ‘repair’, ‘love’, ‘solidarity’, ‘healing’ and ‘integrity as the values which form the basis of their

relationships with those they fund. How would your foundation describe your relationship with those you fund?

- What are the values which are important to your foundation and how are these evident in your work?
- Are you aware of any other models of philanthropy across the world, such as that of 'gifting' in the Japanese culture , 'waqf' in the Islamic tradition or the Southern African philosophy of Ubuntu, which argues that identity comes from relationships with others, requiring respect and care for the community, rather than an individualistic pursuit of wealth or power – what can we learn from these other traditions, which could alter our paradigm?



### Action

- Have a learning session with different team members researching philanthropy in other cultures and discussing what aspects we could benefit from?
- Build a collective mood board with images or words, to capture how you would like those you fund to FEEL about their relationship with you and then pinpoint how this can be implemented.
- If your foundation is focussed on social change, clarify what this means and carry out a learning session on how successful social transformation has taken place. Build a toolbox of lessons you can learn from past social movements.



### Reading

- <https://whyphilanthropymatters.com/article/essay-series-the-expanding-landscape-of-doing-good/>
- <https://whyphilanthropymatters.com/article/in-an-ideal-world-would-there-be-no-philanthropy>
- <https://buildingmovement.org/wp-content/uploads/2021/06/Move-The-Money-Guide-2-Role-Of-Philanthropy.pdf>
- <https://philanthropynewsdigest.org/news/social-change-philanthropy-addresses-roots-of-social-problems>
- <https://www.impactstrategist.com/wp-content/uploads/2015/12/Accelerating-Our-Impact-EN.pdf>

## Phase 1 – Are We Grounded Enough?

Social Justice Framing	Systemic Rationale	Acknowledge History	Philosophical Tradition
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In the Manual, I describe four aspects of grounding – social justice framing, systemic rationale, acknowledgement of history and identification of a philosophical tradition. It may seem a lot, but active consideration of these four ingredients provide a solid and focussed basis for all action.



### Discussion

- What do you believe 'social justice' means and is it important to your foundation? To what extent is it useful for your foundation to use this language or framing?
- The San Francisco Foundation state 'Our housing crisis is rooted in systems, not individual choices. To achieve the scale of change we need, we must change the rules of the game.' How important is it to recognise systemic issues in the work of your foundation? How do you gather evidence in relation to causality of systemic issues and then action that in your funding?
- If you do focus on systemic issues, how do you leverage all your assets and platforms (not just your funding) to influence change? ie advocacy, public policy, narrative change.
- Aleyamma Mathew from Collective Futures emphasised the need to recognise 'both the historical forces that created the inequality, but also the policies and practices'. How does your foundation recognise the history of the UK and its communities in the funding it develops?
- In the Family of Social Justice Philanthropy, identified by G.Albert Ruesga and Deborah Puntenney, discuss what type of social justice philanthropy is important to your foundation – does everyone have a clear articulation?



### Action

- Consider holding an internal learning session on social justice in philanthropy – discuss how relevant this is to your work, how it can be interpreted and whether it should be named explicitly.
- As individuals, is social justice in philanthropy important to you? If so, how can you start to advocate for this language and concept with others in the philanthropy sector?
- For each funding programme, identify and build in levers for change to the system to bring about long term sustainable change.
- Build insight and deep learning into the history of different communities in the UK and the structural reasons for their marginalisation. Convey your learning publicly.
- Explore and communicate the history of your foundation and its source of wealth.
- Define explicitly and publicly which type of social justice philanthropy is important to you, to provide clarity as to your purpose and funding.



### Reading

#### Social Justice Philanthropy

- [Rethinking Philanthropy: Emerging paradigms of social justice – The Philanthropist Journal](#)
- [Shifting Philanthropy From Charity to Justice \(ssir.org\)](#)
- [Social Justice Philanthropy – PEAK Grantmaking](#)
- [Social Justice and a Relevant Philanthropic Sector: Grantmaking – The Center for Effective Philanthropy \(cep.org\)](#)
- [What is a Justice Funder? – Justice Funders](#)
- [Polly Neate: Can charities achieve social justice? \(thinknpc.org\)](#)
- [Funding Justice 2: a report on social justice grantmaking in the UK, 2021–2022 | by Eliza Baring | Civic Power Fund | Medium](#)
- [SOCIAL JUSTICE PHILANTHROPY PRINCIPLES – Resource Generation](#)

#### History

- <https://onlinelibrary.wiley.com/doi/abs/10.1002/nvsm.1726#:~:text=This%20inherent%20and%20unchallenged%20colonial,which%20are%20identified%20and%20explored.>
- <https://whyphilanthropymatters.com/guide/the-history-of-philanthropy/>

#### Grantmaking

- [Choir Book - Justice Funders](#)
- [Microsoft Word - JF Grantmaking Self Assessment.docx \(justicefunders.org\)](#)
- [Microsoft Word - FRONT Design 2.docx \(psjp.org\)](#)
- [Microsoft Word - Grantmaking for SJ and Peace Practical Lessons.docx \(psjp.org\)](#)
- <https://mcf.org/system/files/documents/2023-03/Power-Moves-Philanthropy%20%281%29.pdf>
- [Social Justice Philanthropy Terminology Guide – NCFP](#)

## Phase 2 - Can We Be More Imaginative?

### Strong and Specific Vision

In the Manual, we see very distinct visions of a future world which funders want to build. These are built on an understanding of the grounding elements above and are highly specific to the work that they do. They are powerful and moving statements of intent, can we do the same?



#### Discussion

- Most foundations have a vision or mission statement, consider yours to discuss if it is specific enough and ambitious enough in the change it wants to see. Compare yours with the statements cited in the Manual and note the differences.
- Have a discussion as a Board or a team to consider whether you are ambitious enough? Are there any barriers or obstacles which limit your ambition?
- If you were starting your foundation from scratch, a blank piece of paper, would you be and do the same things as you are now?
- Why is imagination important and how do you encourage this skill within your foundation?



#### Action

- Hold a discussion with the communities you fund (and don't) and get their feedback on whether they think you are being ambitious enough and what they would truly like to see you do.
- The majority of organisations which we fund are under pressure, under resourced and focussed on dealing with the immediate crises in front of them, they do not have the luxury of imagining – what role could you as a foundation play in creating the space and capacity for these organisations to also take part in imagining a new future? What action could you take through your funding, learning or convening?
- Set aside time and create space for your trustees and team to regularly imagine and create – with no objectives or outcomes, but the freedom to go where their thoughts take them. Value and encourage this skill as it is the basis for innovation and transformation.



#### Reading

- <https://citizenstout.substack.com/p/another-world-is-possible-27e>
- <https://www.jrf.org.uk/imagination-infrastructures>
- <https://www.civicimaginationproject.org/theory>
- <https://www.nesta.org.uk/futurescoping/our-work-futurescoping/>
- <https://www.thelongtimeproject.org/>
- <https://newconstellations.co/about/>
- <https://www.imaginationinfrastructuring.com/>

## Phase 3 – What Do We Need to Embody?



Three features are highlighted as being integral to a Foundation's approach – being community-centric, using an intersectional lens and intentionally building movements.



### Discussion

- How are communities involved in the work of your Foundation? To what extent do they drive your mission and methodology? How much power do they have to make strategic and funding decisions, which affect them?
- To what extent, do you feel accountable to the communities you serve and how is this demonstrated?
- How far is intersectionality understood and demonstrated within your funding programmes and mechanisms?
- How have social movements changed the world and what role should philanthropy play, in catalysing them? What would need to change in your methodology, to enable this?



### Action

- Map out what being community-centric looks like for your foundation. List the mechanisms or methodology you would have to put into place to feel that you are community centric.
- Carry out a learning programme for the Board and teams on what is meant by intersectionality and look out how foundations are using an intersectional approach within their funding.
- List the advantages and disadvantages of using an intersectional approach in your funding in particular, look at the example of the General Services Foundation who have moved away from issue-specific programmes.
- Intentionally draw in the expertise of activists and changemakers who do not work in formal institutions but galvanise social change, study what you can gain from their methodology and see how you could incorporate this into your work as a foundation.



### Reading

#### Community-Centric Philanthropy

- [https://ssir.org/articles/entry/building\\_a\\_trust\\_based\\_philanthropy\\_to\\_shift\\_power\\_back\\_to\\_communities#](https://ssir.org/articles/entry/building_a_trust_based_philanthropy_to_shift_power_back_to_communities#)
- [https://learningforunders.candid.org/wp-content/uploads/sites/2/2018/12/Community\\_Philanthropy\\_paper.pdf](https://learningforunders.candid.org/wp-content/uploads/sites/2/2018/12/Community_Philanthropy_paper.pdf)
- <https://www.ncfp.org/2021/11/23/trust-based-philanthropy-shifting-power-to-communities/>
- <https://www.trustbasedphilanthropy.org/resources>
- <https://www.participatorygrantmaking.org/resources>

#### Intersectionality

- <https://nonprofitquarterly.org/beyond-identity-funding-rethinking-social-justice-philanthropy/>
- [https://ssir.org/articles/entry/philanthropys\\_problem\\_with\\_single\\_issue\\_solutions](https://ssir.org/articles/entry/philanthropys_problem_with_single_issue_solutions)
- <https://www.alliancemagazine.org/blog/philanthropy-needs-intersectional-approach/>
- <https://philanthropywomen.org/women-leaders/intersectional-philanthropy-a-conversation-with-suzanne-lerner/>
- <https://blog.submittable.com/7-steps-to-apply-an-intersectional-lens/>
- <https://racialequity.org/2014/06/funding-at-the-intersection-of-race-and-gender/>
- [https://www.bosch-stiftung.de/sites/default/files/publications/pdf/2023-05/The%20transformative%20power%20of%20intersectionality\\_Robert%20Bosch%20Stiftung.pdf](https://www.bosch-stiftung.de/sites/default/files/publications/pdf/2023-05/The%20transformative%20power%20of%20intersectionality_Robert%20Bosch%20Stiftung.pdf)

#### Funding Movements

- <https://ayni.institute/fundingmovements/>
- <https://truthout.org/articles/how-to-create-an-ecology-of-change-by-combining-movement-uprisings-with-long-term-organizing/>
- <https://www.socialchangelab.org/post/how-philanthropists-can-support-social-movements-and-why-they-must>

- <https://www.alliancemagazine.org/blog/fund-social-movements/>
- <https://buildingmovement.org/move-the-money/>

#### Phase 4 – What should we be Building?



In this section, I emphasise the unique place and privilege which philanthropy has to work in a way that is very difficult for any other sector – we can uniquely work across sectors, organisations and siloes. We can also target issues from many different angles and take on a lot more risk than other institutions.



#### Discussion

- What tools or assets do you have as a foundation, which is in addition to your funding? How could you use these to further your mission and assist communities?
- Jonathan Osler from the Marguerite Casey Foundation mentions the power of words, narratives and ideas to bring about social change – how important is it to your foundation to work within this area?
- How can you as a Foundation, utilise your independence and autonomy for greater impact?
- To what extent are you able to take an approach, which is more 'risky' than the public sector? What should this enable you to do?



#### Action

- List all the assets which you hold as a Foundation and identify how you can use them to assist the communities you serve.
- Agree a risk appetite with your Board, which recognises your autonomy and privilege and be transparent about this.
- For one of your funding programmes which is focussed on communities, map out what success for that programme would look like, at a national level. List out all the ways in which you would have to work and the many stakeholders that you would have to work with to shift the dial. Discuss whether your foundation would be prepared and have the skills to work multi-dimensionally and cross-sectorally for the long term.
- Choose a few of the examples of Transformative Philanthropy listed on page 22 and identify what aspects you admire and could replicate.



#### Reading

- <https://www.mckinsey.com/capabilities/sustainability/our-insights/the-role-of-public-private-philanthropic-partnerships-in-driving-climate-and-nature-transitions>
- <https://wkkf.issuelab.org/resource/funding-narrative-change-an-assessment-and-framework.html>
- <https://thephilanthropist.ca/2023/07/convincing-people-that-change-is-possible-by-painting-the-beautiful-tomorrow/>
- [https://ssir.org/articles/entry/better\\_philanthropy\\_through\\_systems\\_change#](https://ssir.org/articles/entry/better_philanthropy_through_systems_change#)

- [https://ssir.org/articles/entry/reimagining\\_institutional\\_philanthropy](https://ssir.org/articles/entry/reimagining_institutional_philanthropy)
- <https://www.sbs.ox.ac.uk/sites/default/files/2022-09/unpacking-systems-change-philanthropy-five-alternative-models-.pdf>

## Conclusion

**Transformative Philanthropy** is rooted in action which is why the report I drafted, is framed as a 'Manual for Social Change'. This work is not meant to be an academic or abstract document but is meant to form the basis for informed discussions, using the wisdom and provocations from the US funders I spoke to.

What we discuss as Foundations, the language we use and the narratives we build, inevitably shape the charitable sector. Which is why it is important for us to constantly challenge ourselves, review what we are doing and aim to do better. I hope that through this Workbook, you manage as Foundations to air some of the contradictions and conflicts inherent in our work.

Our unique position and privilege as funders, with the corresponding ability to intervene in public spaces, means that we carry additional responsibilities to implement our work intentionally, with sensitivity and with clarity.

My hope is that the Manual and this Workbook are seen as an invitation to facilitate the discussions we need to hold openly as Foundations and they help us move from philanthropy as charity, to philanthropy as a catalyst for social change.

**Fozia Irfan**

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