

Worksheet 5: Transparency ¹¹

How open and accessible will your philanthropy be to others? Philanthropists and funders consider a range of transparency options, including:

- **Anonymous:** Our work is done in a way that my/our identity is untraceable.
- **Opaque:** We keep the information others know or see to a minimum.
- **Situational Transparency:** We will be transparent with a select set of people or organizations we trust to help us achieve our philanthropic purpose.
- **Transparent:** We provide easy access to information about our goals, processes, and impact.
- **Public advocate:** We use our philanthropy to attract attention and resources publicly and proactively to a cause or community.

It helps to create basic guidelines around transparency before you are too far along in your philanthropic journey and to revisit your assumptions every few years. Use the worksheet below to draft your desired practices.

1. To whom do we feel most accountable in our philanthropy?

e.g., founding donors, grantees, customers of a family business, or children with no home

2. How could being more anonymous or opaque help our philanthropic purpose or goals?

3. How could being more transparent or public help our philanthropic purpose or goals?

¹¹ Adapted from ideas in [Transparency in Family Philanthropy: Opening to the Possibilities](#), Elaine Gast Fawcett, 2018; [Foundation Transparency: Opacity – It's Complicated](#), Robert J. Reid, 2018; and [What is My Giving Style?](#), Rockefeller Philanthropy Advisors, 2012.

Worksheet 4: Transparency — Continued

4. How might we use transparency to understand ourselves and others in a more meaningful way?

5. You might choose different levels of anonymity or transparency depending on the type of information and the audience. Use this table as a starting point for your thinking by completing each cell with the definitions at the top of the previous page or your own terms.

Desired Level of Transparency or Anonymity to These Groups
 (anonymous, opaque, situational, transparent, public advocate)

| Information to Share | Family members (not on the board) | Friends | Most trusted nonprofits | General public | Other: | Other: |
|-------------------------------|--------------------------------------|---------|-------------------------|----------------|--------|--------|
| Philanthropic Purpose | | | | | | |
| Names of decision makers | | | | | | |
| Family history or story | | | | | | |
| Grant guidelines | | | | | | |
| Governance policies | | | | | | |
| Impact of grants | | | | | | |
| Contact info to ask questions | | | | | | |
| Other: | | | | | | |
| Other: | | | | | | |