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*Giving with Confidence: A Guide to Savvy Philanthropy*

By Colburn Wilbur and Fred Setterberg  
 Berkeley, California: Heyday; 2012  
 ISBN: 978-1-5971-4204-5

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IF YOU WANT TO GIVE AWAY YOUR MONEY, THERE IS NOW MORE ADVICE THAN ever available, with authors clamouring over each other to provide the most informative or inspirational counsel. If you want big name advice, you could read Bill Clinton's book, *Giving: How Each of Us Can Change the World* (2007). Or you could pick up advice and articles by any number of consultants who are now in the giving game. Unfortunately, much that has been written on giving lately seems aimed to either sell consulting services, or comes off as overly pithy or lightweight, which is a criticism that Clinton's *Giving* endured.

As a result, my expectations were low for Colburn Wilbur and Fred Setterberg's *Giving with Confidence: A Guide to Savvy Philanthropy*. Fred Setterberg is given credit as a co-author, although the book is written almost entirely in Wilbur's voice, leaving one with the sense that Setterberg largely played a ghostwriter role. Although both authors are referenced below, the experiences on which the analysis is based generally seems to be Wilbur's. The book is rather slender at 147 pages and a quick read: considering the dust jacket touts benefits of the advice for a broad range of prospective contributors (from small, individual philanthropists to heads of medium size foundations), it seemed impossible that the book's counsel could adequately apply in all situations with much depth.

Reading the advice itself quickly changed this perception. As a fundraiser, I have always believed in the importance of personal giving, and I give to several causes. I believe that, working within the not-for-profit sector, I tend to give wisely. Halfway through *Giving with Confidence*, however, I began to question the effectiveness of my own giving, and started to formulate new, inspired plans for my own modest philanthropic efforts.

Through seven key principles for effective giving, the authors both advise and admonish. For instance, within principle #4 – "Taking Chances" – Wilbur and Setterberg chastise many philanthropists for simply giving to maintain personal lifestyles. He asserts that much giving is simply done to secure institutions that have been of value to the donor in building their own comfortable lifestyle, such as their *alma mater*, their favourite arts and cultural institutions, and so on, but that little is given where it can – as he puts it – really "make change" (p. 85).

By "making change," the authors mean giving that has the potential to fundamentally change the lives of others or have an impact in the wider community. This includes

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giving to agencies that provide social service functions, which often languish low on the list of many philanthropists in favour of the high profile giving attached to their choice institutions of health, education, and arts. There is, of course, nothing wrong with the latter mode of donating but not enough giving in the former. This simple wake-up call is useful for all, as savvy philanthropists seek to balance the effect of their giving across the spectrum of causes, as I do.

As the former CEO of the Packard Foundation, Wilbur has seen a great deal of what makes good not-for-profits tick. He and co-author Setterberg devote an entire principle (#3 – “Dare to be Dull”) to the often-neglected areas of 1) general operating support, 2) gradual incrementalism, and 3) professional development. In smart, snappy language they persuasively state the case for each of these unsexy areas for most grantors. Going beyond the basic pleading for operating support, they also reinforce the fact that philanthropy is a long game, and that change takes time and patience as well as continual investment even when outcomes seem elusive. Perhaps most refreshing for those who work in the sector, they also advocate for building the capacity of organizations by investing in staff and their training and professional needs.

Overall, they dispense crucial advice on how to get connected to the causes you give to – and to throw away the grant process where you can. They build the case for relying on the not-for-profit agency and demand respect for its role. Early on, under their first principle (“Only Connect”), they quote a donor, “Donors should work both sides of the philanthropic street. They should get involved in the nonprofit sector and learn what it’s like to be looking for money as well as giving it away. ... It’s given me a greater understanding of the field, more respect for the people doing the asking, and a very informed and critical eye” (p. 27).

While burgeoning philanthropists may be the target audience for Wilbur and Setterberg’s counsel, fundraisers and grant-seekers stand to benefit as well. Too often, those in the fundraising profession (myself included) put in endless effort trying to state the case for our cause more compassionately, hoping this is what will convince the donor to give. While the compassion is important, responding to the rational needs of, and aiding in the decision-making process for the donor is equally valuable; fundraisers that are willing to look through the lens of the wise donor would be well-served by a quick read of the book’s seven principles of giving and a consideration of how their own organization can help donors through their own application of these principles.

While much of the advice here on giving is refreshing and grounded, the final two principles, “Expand Your Reach with Technology” and “Change the Culture,” come across as either somewhat unnecessary or slightly unrealistic. Counselling the importance of use of and access to technology, from reading philanthropy blogs, to accessing and using data, seems superfluous, considering the earlier advice on learning from others. This is perhaps more a reminder that technology, rather than the message, is becoming ascendant in pitches to potential contributors. I would argue that while it is valuable for many philanthropists to remain current through access to the vast amount of information online, it is not vital, nor fundamental to good philanthropic practice.

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Wilbur and Setterberg then go on to plead for philanthropists to spread the word and to encourage them to give in the same savvy ways that they advise. Of course, they are right – those that give serve as role models to inspire others. Overall, however, the request to stand up and talk about your philanthropic example may be difficult where culture dictates that one of the highest forms of giving is anonymous giving. While this doesn't prohibit donors from talking about the idea of giving, many worthy philanthropists are often quiet about their work. Both approaches to philanthropy should be respected.

Like many books on fundraising and philanthropy, *Giving with Confidence* suffers from a U.S.-centric approach, and many of the resources mentioned are only useful or accessible for American audiences. That said, this isn't an unusual situation for Canadian or global readers, and it should be relatively easy to use these American examples as starting points in the search for similar international examples, where they may exist.

For those already in the business of giving money away, you should be prepared to either be nodding in agreement, or be challenged by some of Wilbur and Setterberg's rebukes of the current state of giving. They are especially harsh on many small- to mid-size foundations, where they feel that donors have abdicated the hard work of giving in favour of an uninspired grant review process, without any significant personal engagement. This, it is rightly asserted, is a formula for ineffective giving.

The end result of Wilbur and Setterberg's wisdom is a quick, valuable read on giving. It is a starting point for any budding philanthropist who needs the real story on giving and the hard work that is involved. It builds respect for the institutions and organizations in the not-for-profit sector and yet, in following the principles, offers a formula for maintaining the autonomy that most philanthropists wish to have. Written in an accessible and easygoing style, with plenty of anecdotes, the book is both amusing and educational.

Before going to any of the other literature that is available (and growing) on how to give money away, *Giving with Confidence* should be the recommended starting point for all new grantors. In *Giving with Confidence*, Wilbur and Setterberg have penned a real self-help book for those who want to help.