

Your Giving Styles

A resource to identify your giving style, and tools to assist you in your philanthropy.

The Giving Journey

The charitable sector is full of solutions to better our world. In supporting those solutions, philanthropists take on different, or even multiple giving styles. They may have three giving styles at once, or their style changes over the years. There is no perfect or linear path within philanthropy. One may start by giving small gifts to causes and organizations that they are familiar with. Over time, how one engages with the charitable sector may gradually grow—sometimes over generations.

We often say that “philanthropy is biography.” To know what is important to a person, look at what charities or causes they support. This can provide meaningful insight into what they have experienced in their own lives that inspires their giving. We believe philanthropists who understand their giving style(s) develop a greater confidence and authenticity that helps propel their philanthropy forward. Knowing where you are prepares you for where you are going. Regardless of where you find yourself, and when, this article is a resource for philanthropists of all giving styles to reflect, see what others are doing, and clarify goals to maximize impact.

The Six T’s of your Giving




Time, Talent, Treasure, Ties, Testimony and Truth.

Giving is not just about money; it is giving your time and much more. The philanthropic community uses several terms, each beginning with the letter “T,” in reference to how one supports charitable organizations. Each has varying degrees of involvement in your giving style(s), but it is good to remember that all are welcome ways of giving.

- **Time** reflects the number of hours you might devote to an organization (e.g., as a board member);
- **Talent** captures the skills you bring in service of an organization (e.g., fundraising, pro-bono consulting, etc.);
- **Treasure** refers to how much money you might give;
- **Ties** broadly refers to how you can leverage your network to benefit an organization (e.g., service providers, new donors, etc.), and;
- **Testimony** is shorthand for how you publicly support and advocate for an organization.
- **Truth** emphasizes your values and how you illustrate your philanthropic ambitions.

Giving Styles

The chart below is a snapshot of three common giving styles with the emphasis on how charitable funds are distributed. Where does your giving lean towards? Is it all three at once, or over time?

	Spontaneous Philanthropist	Focused Philanthropist	Transformative Philanthropist
Description	 <p><i>Gives to various causes when asked or inspired. Supports few, select organizations and may participate on local boards and committees. They are transactional givers.</i></p>	 <p><i>Gives to various causes and has a defined mission and vision. Participates in a leadership role on boards and committees. They are givers that are hands-on with a robust strategy.</i></p>	 <p><i>Gives to a broad range of causes and geographies. Drives change on boards and committees. They advocate for systemic change. Their giving is scale and collaboration focused.</i></p>
Giving Style	<ul style="list-style-type: none"> – Reactive – May be new to giving or give incrementally – Practice “checkbook philanthropy” 	<ul style="list-style-type: none"> – Proactive – Structured, consistent giving – Have a philanthropic plan 	<ul style="list-style-type: none"> – Proactive and pioneering – Structured, consistent, and diverse funding – Have a philanthropic plan and defined giving strategies
Approach	<ul style="list-style-type: none"> – Tend to make annual recurring or one-time gifts – Give to well-known organizations – May have a Donor Advised Fund (DAF) – Receive little or no professional giving advice – Perform limited due diligence – Are hands-off with no/minimal strategy – Does not measure success, but may like to know how the gift is used 	<ul style="list-style-type: none"> – Make larger, multi-year commitments that are restricted and unrestricted (i.e., general support of an organization) – Local and place-based philanthropy – May have a Donor Advised Fund (DAF) and/or Private Foundation – Receives professional charitable giving advice or due diligence support – Engages family in philanthropy – Are intentional and strategically minded – Focus on metrics and impact for 1 – 3 years+ 	<ul style="list-style-type: none"> – Make long-term and multi-year commitments, blends restricted and unrestricted giving. Provides for perpetual, sustainable support – Participate in collective donor groups to pool funding and build capacity of a sector or system – Have an established charitable vehicle(s), such as a DAF, Private Foundation, LLC and gift planning through a CRT or CLT. May practice impact investing and social finance – Employ professional subject matter experts – Change systems, not just symptoms – Provide funding to become more impactful at scale by prioritizing understanding the problem before funding the solutions – Focus on outcomes and impact for 1 – 10 years+

Resource Library

Now that you have a sense of your giving styles, we invite you to review the resources below to further guide your philanthropy journey.




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Description	 <p>Gives to various causes when asked or inspired. Supports few, select organizations and may participate on local boards and committees. They are transactional givers.</p>	 <p>Gives to various causes and has a defined mission and vision. Participates in a leadership role on boards and committees. They are givers that are hands-on with a robust strategy.</p>	 <p>Gives to a broad range of causes and geographies. Drives change on boards and committees. They advocate for systemic change. Their giving is scale and collaboration focused.</p>
	<ul style="list-style-type: none"> – Charitable Giving—The rules of the road – Giving terms—A glossary – Do you want to serve on a nonprofit board? – Nonprofit Junior Boards—The benefits of starting young – Giving for good—choosing nonprofit organizations to support – Philanthropy Insights podcast series 	<ul style="list-style-type: none"> – Charitable giving vehicles—Donor-advised funds and private foundations – Strategic planning for philanthropy – Understanding motivations—The power of a philanthropic Plan – Building a strong family Foundation – Staffing your private foundation – Rising Generation—Your seat at the family philanthropy table – What to consider when establishing scholarship funds 	<ul style="list-style-type: none"> – The New Continuum—aligning interests, investments and impact – Hosting a philanthropic roundtable – About the UBS Optimus Foundation – UBS Collectives – UBS Philanthropy Compass

Table and Contents adapted from Co-Impact, Typology of Philanthropists from “Promoting Higher-Impact Philanthropy: What We’ve Learned” (published November, 2021)—changes made to the original document and license use can be found [here](#). “Six T’s of Giving” adapted from the American College of Financial Services.

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