



# GIVING VISIBLY, UNDER THE RADAR: CONSIDERATIONS AND OPTIONS FOR THOSE WHO DON'T LOVE THE LIMELIGHT

---

DR. SHARILYN HALE  
PRESIDENT, WATERMARK PHILANTHROPIC COUNSEL

A major theme from **A Portrait of Affluent Giving in the Caribbean: Experiences, barriers, and the future of philanthropy** is privacy. Philanthropists in the region prefer giving quietly, driven by factors such as culture, religion, and security. As such, gift announcements and named gifts from individuals for buildings, spaces, and programs are rare. Unfortunately, this discretion seems to contribute to perceptions that giving is rare.

In other parts of the world, public naming and recognition for charitable giving are more common, making philanthropy overt and visible, and many philanthropists enjoy being highlighted in this way. Yet, an increasing number of affluent donors desire greater privacy in their giving, to avoid undue scrutiny in these digital and polarized times.

It is incredibly important in our communities that we have the opportunity to see the generosity swirling around us, and the ways in which it makes our individual and collective lives better, safer, and healthier. So if you're a philanthropist on the fence about how visible you want to be with your giving, here are some questions to consider, no matter where you live or give.





### **1) What do I want to accomplish by making this gift?**

For major charitable investments, Watermark recommends philanthropists consider approaches to public recognition and naming on a gift-by-gift basis, as the strategy may differ per gift. Clarify the objectives for the gift, distinct from what the gift will fund. Do you want this gift to help put an issue or organization in the spotlight? Could your gift and influence spur peers and others to also contribute significantly? Is the gift forming, driving, or cementing a personal or family legacy? Do you have reputational or brand goals to accomplish?

Remember, the charity will likely also have goals they'd like to advance through your gift, so why not explore these together? They will appreciate your candor, and together you can map an approach that suits both parties.

### **2) What do I wish to avoid in making this gift?**

Probing what you want to avoid is also helpful in crafting a strategy. I have known philanthropists who were genuinely uncomfortable with being put on a pedestal and concerned about perceptions of self-promotion, or worried there would be too much focus on the dollar amount of the gift over the impact the gift would make possible.

Others are sensitive to what family or extended family may feel, or may experience as a result of a very public major gift. Here, in all cases, robust communication with the charity and within the family can go a long way to explore strategic options and ensure alignment.

There may also be a desire to avoid conflict or public criticism, in cases where a gift might be directed to a controversial or deeply personal cause, or where there is potential for pushback as to how the gift might be funded. Risk screening can help mitigate concerns. Note that a prudent charity will also assess risks associated with the gift, given it has a duty to protect its own reputation, mission, and charitable status.

### **3) How confident am I in my charitable partner?**

Philanthropists typically make major charitable investments to organizations they know and have a relationship with. And for good reason. Sharing your name, credibility, and reputation with a charitable partner is an act of trust.

Do you have confidence in their ability to manage the relationship with you and the details of your gift, today and for the long term? Do they act ethically and treat personal and/or confidential information with respect? Are they able to deliver on what you have mutually agreed relative to the recognition and communication of the gift, including if you wish to remain anonymous? What is their policy under which naming benefits can be changed or withdrawn?



#### **4) What options are possible?**

With those questions explored, how public you wish to be when making a major charitable gift is up to you – ranging from complete anonymity to full public recognition and high-profile naming. For those seeking a middle way, here are some practical alternatives to consider:

- Welcome public recognition of the gift in your name, without the gift amount announced
- Invite a public announcement of the gift and gift amount, without your name
- Consider naming a gift in the memory of a loved or honoured person or family
- Agree to your gift being shared within the organization's immediate community but decline a wider gift announcement
- Host a gathering with a small circle of peers and colleagues to share about the gift, your motivation for giving it, and its intended impact
- Collaborate with others to make a joint gift, sharing the resulting profile
- Brainstorm ways you can promote giving and philanthropy in ways that extend beyond public recognition for a specific gift

Remember that for those who give through a private foundation in jurisdictions like the US and Canada (unlike giving through a donor advised fund or community foundation), all grants are publicly disclosed and searchable, so even if you decline public recognition for a gift, the gift may not remain private.

Having professional philanthropic counsel can help you tease out your goals, work with your charitable partners to identify viable options, and ensure the strategy is implemented effectively. Contact Watermark for details.

**Dr. Sharilyn Hale**  
**President, Watermark Philanthropic Counsel**

416-567-3002

[sharilyn@watermarkpc.com](mailto:sharilyn@watermarkpc.com)

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

