



"Giving" Advice



TOLEDO COMMUNITY FOUNDATION
608 MADISON AVE
SUITE 1540
TOLEDO, OHIO 43604-1151

419-241-5049
[TCF "GIVING" ADVICE NEWSLETTER](#)

ABOUT YOUR FOUNDATION

Since 1973, the **Toledo Community Foundation** has provided individuals, families and businesses interested in the well-being of our community with an *efficient, effective, low-cost, professionally managed* mechanism to achieve their charitable goals.

For philanthropists wishing to maximize the impact and life of their charitable gifts, the Foundation provides *resources for thoughtful giving*. Using its expertise and personalized services, **Toledo Community Foundation** helps donors

[<Back to Front Page](#)

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Donors: No Name Tags on Big Gifts

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By Steve Chawkins | Times Staff Writer

The news hit Opera Santa Barbara like Wagnerian thunder: An anonymous donor had pledged \$5 million—the largest gift in the group’s 14-year history.

The windfall, announced in February, will finance an annual production by one of the donor’s six favorite composers. In an operatic flourish, the benefactor’s name will be unveiled only after his or her death—on programs for productions made possible by the bequest.

“In the long term, this individual will be recognized,” said Steven Sharpe, Opera Santa Barbara’s general director. “But for now, the donor said, ‘I don’t want to walk into the coffee shop and have strangers come up and talk to me about this gift.’”

That seems to be an increasingly common feeling among the giving elite these days. According to the Chronicle of Philanthropy, unnamed donors of \$1 million or more made 2007 “a banner year for anonymous charity,” with 87 gifts totaling nearly \$1.1 billion.

To be sure, the great majority of donors still prefer to be recognized with a line in the alumni newsletter—only about 1% of UCLA’s donors are anonymous—or their names on concert halls. And even some ostensibly anonymous donations come with ample fuel for insider gossip; in Santa Barbara, the opera has revealed that its big donor is one of its 19 board members and loves the works of Gounod, Leoncavallo, Puccini, Rossini, Verdi and Wagner.

Still, more of the extremely wealthy are keeping their generosity secret. That sometimes disappoints recipients eager for publicity, but donors

transform their philanthropic impulse to measurable community impact. Beyond the gifting of assets, the Foundation helps donors identify issues of importance to them and *inspires engagement* with community organizations addressing these issues, thereby maximizing the impact of charitable gifts and creating a greater sense of fulfillment.

often fear that a story in the paper could bring calls from other charities and scrutiny from their communities.

"A couple of decades ago, charities were pushing donors to be identified, telling them they needed to be known to help the cause they were interested in," said Dwight Burlingame, associate executive director of Indiana University's Center on Philanthropy. "Now the pendulum is swinging the opposite way."

Sometimes donors opt for anonymity to keep their own relatives in the dark. "They don't want people even in their immediate family to know how much they actually have," Burlingame said. "You see the nieces and nephews going after the charitable dollars a person may have donated: 'How can you do that? You didn't give us that much!'"

Some also fear that their philanthropy could make them targets.

Last year, La Jolla billionaire Ernest Rady, his wife and their housekeeper were attacked with a stun gun and bound with duct tape in a home-invasion robbery. The family is known for its generosity, having contributed \$60 million to what became Rady Children's Hospital and \$30 million to the Rady School of Management at UC San Diego.

Security consultants "concluded that the publicity surrounding these donations could have led" to the attacks, said Robert Grimes, an attorney for the Radys' 40-year-old son, Harry. The son pleaded guilty to weapons charges last November, saying he needed a cache of firearms, including three Romanian AK-47s, to protect his family.

Whatever the reason for anonymity, all sorts of California causes have benefited from the kindness of strangers.

A \$150-million donation—the largest known anonymous gift in the U.S. last year—went to UC San Francisco for cancer care and research. Last October, an anonymous \$10-million grant buoyed the Children's Museum of Los Angeles, which had struggled to pay for construction of its new facility.

A \$1-million check was given anonymously to a fund for families whose homes were damaged or destroyed in Orange County's Santiago blaze last fall. Many believe it came from David Gelbaum, a retired Newport Beach hedge-fund billionaire who has given at least \$250 million to conservation causes—most of it anonymously.

Although names have a way of getting out, some organizations take extraordinary steps to shield donors. At Cal Poly San Luis Obispo, only five or six officials know who pledged \$60 million to the architecture department last year, said Mike McCall, the school's chief development officer.

It was the biggest donation ever, named or unnamed, to any California State University branch. In campus records, the man—a former Cal Poly student who dropped out for financial reasons—is identified only by a number.

"This particular donor travels a lot internationally," McCall said, and an inadvertent release of his name "might increase his need for security."

Still, leaks happen. Even the famously publicity-shy philanthropist Chuck Feeney, who has given away about \$4 billion, has said he became "synonymous with anonymous" before he revealed the extent of his giving during a legal proceeding in 1997.

For recipients, a donor's anonymity can mute the publicity that might generate additional gifts.

"You can't tell a story—there's not the personal touch of a name being connected to it," said Cliff Lundberg, a vice president of Santa Barbara's Westmont College.

In 2006, the college received an anonymous gift of \$75 million—its largest ever.

"This donor would like to stay in the background so they don't get approached by dozens of other organizations looking for gifts," Lundberg said. "But most important to them is that we are a Christian college and they want God to get the credit."

As highly valued as it is in many religious traditions, anonymous charity can also trigger bitter conflicts. After the Sierra Club received more than \$100 million from an unnamed source in 2001, there were charges both inside and outside the group that the donor was trying to buy its silence on illegal immigration.

"Is this foreign money?" asked former Colorado Gov. Richard Lamm, an outspoken critic of U.S. immigration policy. "Is it money that comes with special obligations?"

Sierra Club director Carl Pope denied that the donations carried any influence. So did Newport Beach billionaire Gelbaum, whom *The Times* three years later identified as the donor.

Such cases have led some states to pass laws exempting donors to certain nonprofits from open-records rules.

"I don't think that someone who wants to give to gay marriage or adoption or prayer in the schools or anything else controversial should be outed," said Kim Wright-Voilich, president of San Francisco-based Schwab Charitable. "It's an important expression of citizenship." Her firm sells "donor-advised funds," which can give donors a hefty tax break and more privacy than some other philanthropic vehicles.

Anonymity also allows donors to look in, unnoticed, on the objects of their generosity. At Cal State Monterey Bay, a man who gave \$2.5 million toward a reading center sometimes strolls the campus, observing.

"No one knows who the heck he is but the president, me and three other people," said Steve Weldon, the school's director of planned giving.

"We're just delighted."

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[<Back to Front Page](#)

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