To **act boldly**
we must ask bold questions.
TPI’S FIRST BOLD QUESTION

Just 25 years ago, the term “strategic philanthropy” was not part of the lexicon for most of us. Donors and corporations were likely to be more reactive and fragmented than strategic and proactive in their giving. There was limited access to sophisticated knowledge, skills and tools, and few role models for targeting philanthropic resources in ways that could achieve significant change.

Convinced of a latent hunger to accomplish more, Peter Karoff decided to try a “social experiment.”

Would it be possible to help donors and corporate leaders increase the impact of philanthropy, and in doing so, promote the concept and practice of generosity?

SNAPSHOTS OF IMPACT

1989  TPI BEGINS
Peter Karoff launches a “social experiment” to see if the idea of strategic philanthropy, when applied to a broader cohort of donors, can increase effectiveness and encourage greater generosity.

1994  INTERGENERATIONAL TRANSFER OF WEALTH
With the Johnson and Kellogg Foundations, TPI hosts a Wingspread Seminar on philanthropic opportunities created by the intergenerational transfer of wealth.
Peter and a small team launched The Philanthropic Initiative (TPI), one of the first nonprofit philanthropic consulting enterprises. The firm’s original mission was “to increase the effectiveness of philanthropy through innovative ideas combined with a carefully designed plan of execution.” We sought to demonstrate that, in the right circumstances, philanthropy can serve as society’s risk capital – a crucial social investment resource and a powerful catalyst for change.

Today, TPI continues to be driven by these guideposts. Critical to our mission is the notion that every donor has the power to achieve lasting social impact. Peter Goldmark, who played an integral role in TPI’s early years as former President of the Rockefeller Foundation, defined philanthropy as the practice of applying assets of knowledge, passion and wealth to bring about constructive change. We continue to embrace this definition and see it exemplified in so many TPI clients.

TPI’s work starts with listening deeply to clients so their unique values, goals, aspirations and concerns – combined with research and analysis of best practices, lessons learned, and input from experts, practitioners and others – underpin the resulting strategies. In partnership with TPI, clients have transformed good intentions into thoughtful and informed philanthropic strategies. We have had the great honor and privilege to work with extraordinary donors and corporate leaders who have turned ideas and resources into lasting impact – people with vision, courage, creativity and leadership.

1995 EDUCATION REFORM
TPI helps clients seed two school reform organizations transforming the education landscape – Big Picture Learning and the Center for Collaborative Education.

1998 PHILANTHROPY IN THE DIGITAL AGE
TPI works with AOL to create Network for Good, the nonprofit online giving platform first launched by the AOL Foundation.
ASKING BOLD QUESTIONS

TPI has always encouraged donors and corporate leaders to be proactive, and to look for gaps and opportunities where resources can be applied to tackle important social issues. As such, changes in the field of philanthropy over the past 25 years are easily marked by the bold questions asked of and by TPI and its clients. Here are just a few.

We have a big idea. How can we use our time, talent and treasure to achieve our vision?

As avid triathletes, the Litowitz family wanted to help triathletes with physical disabilities who have the determination, but not the financial resources, to achieve their full potential. They enlisted TPI’s help, which started with a research scan exploring existing efforts across the country. TPI then worked with the family to create the best platform for impact: a partnership with Dare2tri. This small nonprofit organization was providing high-quality programs for triathletes with physical disabilities and visual impairments, with a limited budget and no full-time staff. With continuing support from TPI, the Litowitz family has helped to build the capacity of Dare2tri and establish the Ability Fund, a grants program designed to eliminate barriers to athletic competition like high-priced equipment, travel, coaching and race entry fees. The organization’s success now serves as a national model, enabling more athletes to achieve their athletic and personal goals.

How can we more fully leverage our corporate resources and go beyond simply writing checks?

Stanley Goldstein, co-founder and former Chairman and CEO of CVS Health Corporation, came to TPI with this question. Based on input from key stakeholders, social issues research, and program design work led by TPI, CVS embraced a corporate philanthropy strategy focused on education reform. Not content to just support existing efforts, the company crafted several signature initiatives, and ultimately seeded the creation of Big Picture Learning, a nonprofit organization launched in 1995 to fundamentally redesign education in the U.S. Thanks to later support from the Bill & Melinda Gates Foundation and other funders, more than 115 Big Picture schools now operate in 14 states and internationally. Starting with one bold question, CVS and Stanley Goldstein harnessed the power of corporate philanthropy and helped shape the future of education throughout the U.S. and beyond.

SNAPSHOTS OF IMPACT

1999  
STRATEGIC CORPORATE GIVING  
TPI helps Paul Newman and corporate leaders form the Committee Encouraging Corporate Philanthropy.

2000  
DONOR EDUCATION & RESOURCES  
TPI develops “What’s a Donor to Do?” – a first-ever major sourcebook on resources available for new and emerging donors, and a benchmark on donor education and resources.
How can our family find a compelling focus and strategy for our foundation?

When the Jenjo Foundation, founded by Alan and Arlene Alda, came to TPI trustees were responding to donation requests and supporting good organizations, but had not identified a specific focus for their giving. Following some initial planning, the trustees agreed to concentrate on early childhood, youth development, and violence prevention. Several years later, the trustees sought to narrow their focus further to increase the foundation’s impact. The trustees’ own life experiences, combined with national research and discussions with experts, led them to a focus on youth mentoring. With ongoing support from TPI, the Jenjo Foundation has helped to create and support a range of innovative youth mentoring programs in Massachusetts and New York, and has awarded mini-grants to support video creation, giving grantees a tool to help sustain these programs in the long term.

Can I do more good by investing in people rather than institutions?

One of TPI’s first clients recognized the power and potential of quiet leaders and change agents to help build community and shape the future in positive ways. With this question as a starting point, TPI researched approaches and lessons from other awards programs, and worked with this donor to design and manage the Boston Neighborhood Fellows (BNF) program. Every year BNF awards five unsung heroes in Boston with $30,000 over three years, no strings attached. After 25 years, the program has awarded $3.5 million to 143 extraordinary individuals whose work reminds us that hope and possibility exist, even in difficult times. By putting resources directly into the hands of social entrepreneurs and community leaders quietly making Boston a better place to live and work, BNF is one answer to this donor’s bold question.

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**2007** FAMILY PHILANTHROPY
TPI and community foundation partners develop the Excellence in Family Philanthropy Initiative to train community foundations that advise donors.

**2008** INSPIRING HIGH-IMPACT PHILANTHROPY
How can we help to “solve” homelessness?

At its inception, the Melville Charitable Trust knew it wanted to find systemic solutions to homelessness in the state of Connecticut, but didn’t know where to begin. The trustees turned to TPI to facilitate a learning process on the complex array of issues, and how philanthropy could leverage change. TPI served as a strategic home and incubator to the Trust for well over 15 years. Starting in the 1990s and continuing to this day, the Trust has been highly creative and focused in tapping the full range of philanthropic tools, resources and strategies to work toward answering their first bold question, moving their impact far beyond conventional grantmaking to “proven, lasting, and cost effective alternatives that will permanently end homelessness as we know it today.”

Are scholarships enough? Can we do more to help young people get into college, thrive and go on to successful careers?

For many years, the Yawkey Foundations offered tuition assistance to low-income students through their scholarship program. Although the support was helpful, many students continued to struggle with academic, personal and financial issues. Knowing they could do more to support low-income college students, Yawkey turned to TPI for help. Drawing from TPI’s research and experience creating and managing other effective college success programs, the Yawkey Scholars Program was redesigned to include a mentoring component and financial and nonfinancial wrap-around supports that go beyond traditional scholarships. The Yawkey Scholars are thriving. Now managed by TPI, the program enrolls 25-30 students each fall and supports them through college. All are on track to graduate – an especially inspiring achievement considering that over 60% of Yawkey Scholars are first-generation college students.
LOOKING AHEAD: BOLD QUESTIONS FOR PHILANTHROPY’S NEXT CHAPTER

Philanthropists at the early part of the twentieth century asked a bold question that remains relevant today: How can wealth be wielded for change that benefits society at large?

In the latter half of the twentieth century, sustained economic growth expanded the philanthropic community. As more companies, communities, families and individuals began to believe in their ability and responsibility to have impact, the questions became more strategic:

- What levers of change can philanthropy influence to move the needle on critical issues?
- What innovations will lead to significant breakthroughs?
- How can donors best integrate efforts that are strategic, opportunistic and responsive?

Today, these questions are de facto starting points for those seeking to achieve deep social impact through philanthropy. Despite tremendous investments of philanthropic capital to address society’s most challenging issues, many statistics are sobering – poverty is increasing in the United States, childhood obesity remains a grave concern, the public is divided about climate change worldwide, and the list goes on. Yet there are bright lights of progress, where philanthropy has played an instrumental role – increased college graduation rates, reduced poverty levels in some parts of the world, and disease containment, to name a few.

Philanthropy requires renewed attention to bold questions:

- How can philanthropy create a new age of opportunity?
- How can we best harness the power of networks and work across sectors to grow philanthropy’s impact?
- What is the highest and best use of philanthropy?

TPI’s mission remains constant, even as our consulting practice advances and our work as a central resource for philanthropic communities flourishes. The focus remains on the concept and practice of high-impact philanthropy. Join us on your philanthropic journey to seek answers to your bold questions.
The Philanthropic Initiative (TPI) is a global philanthropic advisory practice that helps companies, foundations, individuals and families increase the impact of their giving. In over 25 years, we have worked directly with more than 350 clients, directed more than one billion philanthropic dollars, and influenced billions more.

TPI was founded on the belief that philanthropy has the power to transform. Now a distinct operating unit of the Boston Foundation, we continue to fuel the growth of high-impact philanthropy around the world through our philanthropic consulting work as well as cutting edge research, philanthropic education programs, and initiatives with key allies.

Partner With Us

Ask your bold questions.
Take a step towards more strategic philanthropy.
Make an impact.

Together, we’ll take your giving further.