

Our Seventh Roundtable Discussion: Building Your Philanthropic Strategy

On June 4th 2026, WiP held our seventh nation-wide roundtable discussion online with women philanthropists, exploring strategies for inclusive and sustainable giving in Canada's philanthropic sector.

Audits, Alignment, and Capacity

- Personal “philanthropic audits” help assess where time, energy, and resources are being directed
- Capacity limits must be recognized and protected, especially when volunteer roles expand to unpaid labour
- Engagement must align with personal values and lived experience

Sustainable Transitions

Designing “Good Endings”

- Time-limited commitments must be established prior to giving to provide clarity on duration & expectations
- Structured exit practices, such as long notice periods, exit grants (if applicable) and introductions to alternative funding sources, are helpful
- Compassionate communication anchors the conclusion of funding, ensuring transparency & respect

Power Dynamics & Reciprocity

- Expectations often shift once involvement begins, creating pressure on donors and volunteers as roles intensify
- Reciprocity and energy exchange guide decisions about where and how to give, and when to exit
- Donors want to be treated with compassion and respect, especially during financial hardship or personal crises, rather than transactional engagement

Evolving Roles

Strategy Across Life Stages

- Giving shifts across professional and personal transitions, reflecting changes in identity & capacity
- Early-career engagement often aligns with workplace culture, shaping how and where women first participate
- Retirement and family integration introduce new starting points, including joy-based giving and incorporating family philanthropic interests

The Role of Advisors

- Financial & wealth advisors, and estate lawyers often lack sector knowledge, leading to misalignment between donor intent and community needs
- Community foundations are seen as trusted, but under-recognized, sources of guidance
- Advisors must be willing to meet donors where they are: from seasoned philanthropists to women learning about the charitable sector and governance leadership

Trusted Guidance

Need for Philanthropic Resources

- Philanthropists highlighted struggling to find new causes without relying solely on personal networks
- Scripts and boundary supports are needed, especially for saying “no” and managing repeated asks
- Trusted learning resources are lacking, leaving donors without reliable ways to explore unfamiliar issue areas or to deepen their understanding

“It’s like an oxygen mask, are we putting on our own before supporting others?”

“Now that I’m retired, I can enjoy personal philanthropy & give to what gives me joy. I don’t have to support a brand.”

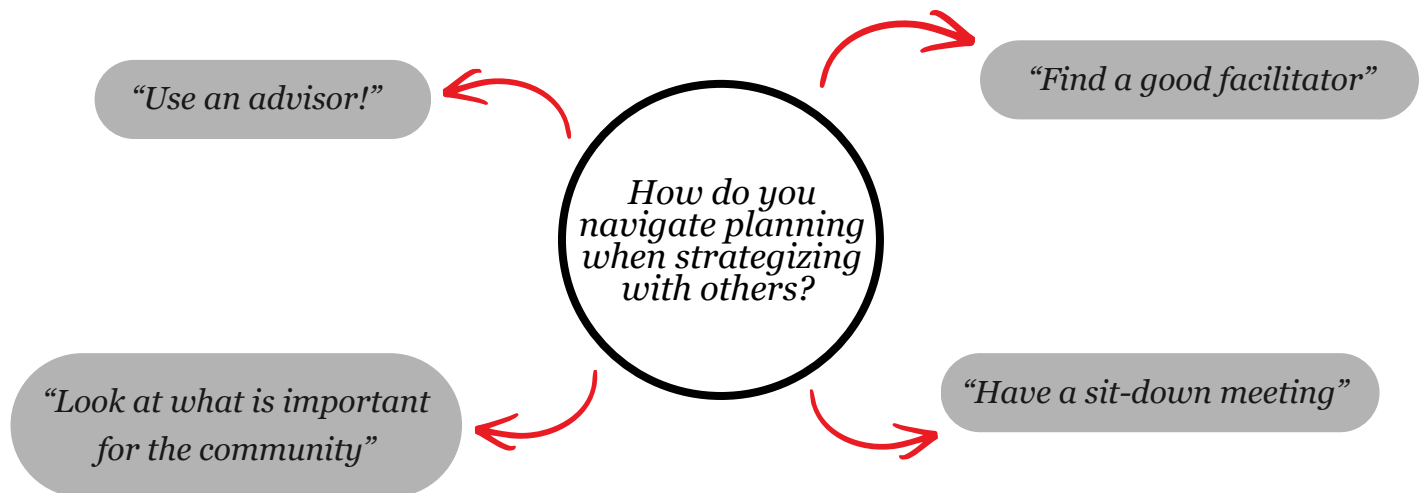
“Younger women in philanthropy need to receive quality onboarding about the charitable sector and how it works.”

Building Your Philanthropic Strategy

Considerations that can shape the development and evolution of a philanthropic strategy:

1. Tax considerations may influence timing and size or type of a gift, particularly when donors are managing capital gains. While tax benefits can inform giving strategies, participants viewed them as a tool to support philanthropic goals rather than the primary motivation.
2. Developing a philanthropic strategy may involve reconsidering one's role within a broader system and considering how philanthropy fits within larger social, economic, and community systems.
3. Philanthropic decision-making within family contexts can involve complex dynamics between generations, spouses, or other family members. Advisors can help navigate these tensions and support conversations about values and priorities.
4. Participants noted that "next generation" philanthropy is often less about age and more about transitions in philanthropic leadership and decision-making within families.

Roundtable Insights



We are deeply grateful to everyone who contributed with their stories and resources.

**Women in Philanthropy will be hosting online roundtables throughout 2026.
Email WiP@carleton.ca for more information and to join the conversation.**