

# Philanthropic Purpose

Defining Your Motivations, Values, Principles, and Priorities

*Why do you want to make a difference?*



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY



# About this Series

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This primer is the first in a series of seven about the Family Giving Lifecycle. The Lifecycle framework encompasses the breadth and inflection points of family philanthropy and orients donors to effectiveness for the purpose of promoting better outcomes.

This framework recognizes the complexity of family decision making and acknowledges the iterative nature of the journey families undertake, making room for revisiting topics as the family and philanthropy evolve. The Lifecycle framework applies to families at all stages of their philanthropy<sup>1</sup>, whether they are a wealth creator just starting out or a multi-generational family foundation improving their work. It is important for donors and their families to revisit the seven inflection points over time as they evolve and learn.

In each primer you'll find: basic information to get started or refresh yourself on the topic, ways to improve when you have the time and will, tips for involving your family, worksheets to guide your thinking, and a few select resources to advance your practice.

The full series of primers and related resources are available [here](#). The National Center for Family Philanthropy (NCFP) also provides workshops related to the primers. To learn more, please [contact us](#).

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<sup>1</sup> **Philanthropy** is “voluntary action for the public good.” It can be informal and/or formal and include giving, granting, volunteering, investing for social/environmental impact, building social enterprises, advocacy, and/or other actions. **Family philanthropy** is when multiple branches and/or generations of a family (self-defined) take those actions together.

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**Philanthropic Purpose**  
Impact Vehicles & Structures  
Governance  
Impact Strategies & Tools  
Assessment & Learning  
Operations & Management  
Succession & Legacy

# Overview

*“Ambiguity about one’s values and beliefs is the enemy of impact. It will waste resources, confuse strategic decisions, and muddle implementation. Ambiguity will also confound family members, trustees, and foundation leaders working to support the donor’s intentions.”*

– Thomas J. Tierney and Alan Tuck, The Bridgespan Group

For your philanthropy to be both meaningful and effective, it is critical to understand *why* you want to give. *Why* you give matters just as much, if not more, than *what* you give. The *why* guides every aspect of your giving. It enlivens, inspires, and informs your philanthropy, infusing every action you take and decision you make with purpose and meaning. It makes what you do *matter*—for yourself, for your family, and for the communities and causes you support.

Defining the *why* typically calls for deep self-inquiry and discussions with family members. It asks you to consider:

*What is truly motivating me to want to give?*

*What do I care about most?*

*What are the core values or principles that drive my decisions?*

This primer will help you create or revisit your philanthropic purpose and clarify that purpose with and for others. In the primer, you will find:

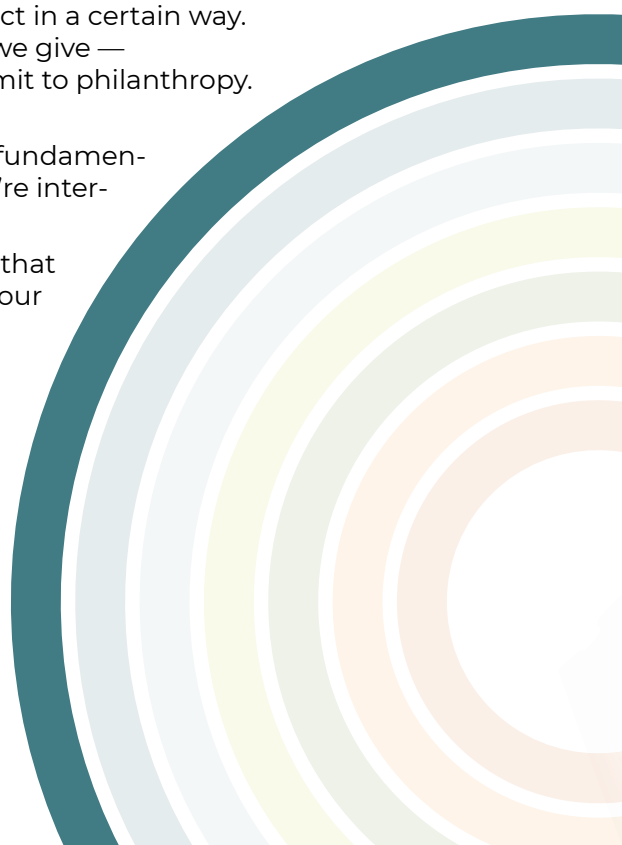
## I. The Fundamentals

Each donor or family will define and document their philanthropic purpose in a different way. They usually start with one or more of the following ideas:

- **Motivations:** our specific impulses or reasons we act in a certain way. They’re the *inspiration and rationale* behind why we give — the purpose and the aim, the core of why we commit to philanthropy. They may change over time.
- **Values:** what’s important in our life, ideas that are fundamental to our character and our decision making. They’re internal and subjective and may change over time.
- **Principles:** our moral compass, the rules or beliefs that help us know what is right and wrong and govern our behavior. They’re statements we can act on, often ways we’re living out our values. They tend to be timeless and even transcend cultural differences.
- **Priorities:** preferences for populations, places, problems, or issues in which we most want to make a difference.

You can pick the starting point that resonates most with you and your family.

*To get started on the basics, or to revisit and revise your philanthropic purpose, see [pages 6-9](#) and [worksheets 1-3](#).*





## II. Extending the Fundamentals

Over time, donors often refine their **giving style**—their preferences for how they make a difference. Many will combine elements of motivations, values, priorities, and/or giving style to create a **vision statement**, **mission statement**, and/or statement of **donor intent**.

*To clarify and strengthen your philanthropic purpose, see [pages 10-13](#) and [worksheets 4 and 5](#).*

## III. Involving Your Family

Donors often hope to involve family members—siblings, children, grandchildren, or favorite aunts or uncles—in their philanthropy. Families who find the most meaning in their philanthropy cooperate to define their philanthropic purpose and adapt it over time. They are more frequently involving friends, experts, and community members in the process.

*For hints on involving your family or others in creating a philanthropic purpose, including using the worksheets in the primer, see [pages 14-16](#).*

## IV. Looking Ahead

Your philanthropic purpose won't stay static. It will evolve in response to changes in your life, in your family, and in the communities and causes you care about. Effective families make time every few years and at times of transition to revisit their philanthropic purpose to ensure it remains meaningful and relevant and still effectively guides decision making.

*For hints on looking ahead and helpful resources, see [pages 17-18](#).*

### Benefits of a Clear Philanthropic Purpose

Defining and documenting your philanthropic purpose early in your philanthropy journey, even in a rough draft form, pays off later. Benefits include:

**Language and ideas that help unify families** around a common agenda and enhance their sense of family unity in their daily lives and family businesses.

**Clearer rules for group decision making** by families and/or staff members and more effective governance by a board.

**Grantmaking, scholarship, impact investment, or other guidelines** that help you bring your heart and soul to the use of your philanthropic resources.

**More meaningful measures of impact** and accountability.

**Clearer statements of donor intent** to guide the philanthropy if you are unable to continue.



# I. The Fundamentals

## Determining Your Philanthropic Motivations

*“Whatever you invest in the lives of others, you are paid back many times over and often in wonderful ways.”*

– Paul and Debbi Brainerd, Founders, The Brainerd Foundation

There’s a moment in every person’s life when you felt that first unmistakable impulse to give.

Maybe you felt a strong need to give back to the community where you and your family earned your success. Perhaps you experienced a life event or a cause that moved you deeply, calling you to want to make a difference. Maybe you’re driven to strategically make a measurable difference in a problem. Or you simply want your family to *do* something and *share* something together that is larger than all of you.

Philanthropy is a deliberate choice, and it is one that you must assert time and time again. Motivations give language to that continuous choice. Some motivations are from the heart and personal experiences. Others are based on our reactions to the opportunities and needs in the world. NCFP identified six common motivations in conversations with hundreds of donors and we’ve since added three more:

- 1. Faith and Spirituality:** Every religious or faith tradition includes some tenet urging concern for others. Some donors openly talk about the link between their faith and giving. Others use their faith as quiet motivation.
- 2. Privilege and Social Consciousness:** Many donors recognize their privilege, success, and good fortune and feel called or even compelled to pay it forward to others.
- 3. Family Traditions and Legacy:** Family traditions in volunteering, giving, and caring for others are often a catalyst for donors. So too, is the opportunity to extend the traditions and values of the family in future generations. Some donors create legacies of giving and impact that thrive for many decades or centuries.
- 4. Mentors and Heroines:** People—alive or dead, real, or fictional, famous, or anonymous—often have a profound impact on our lives and our motivations to do good.
- 5. Personal Interests and Experiences:** Giving is often influenced by lifelong passions and/or intensely personal experiences such as the death of a loved one or benefitting from the generosity of others.
- 6. Community and Social Connections:** Philanthropy can be a way to strengthen meaningful relationships through volunteering, giving, attending events, or serving on boards with friends, colleagues, and peers.
- 7. Business Skills and Experiences:** Philanthropy is a personal pursuit and is often sparked by the drive to use professional skills and knowledge to make a difference in the lives of others.
- 8. Compelling Needs:** Frequently, philanthropy is the response of opportunity. Many donors feel compelled to respond quickly and compassionately to a person in need, humanitarian crisis, or natural disaster.
- 9. Impact:** The desire to make a measurable impact on an issue of community, advance social change, or catalyze the necessary changes in society is a primary motivation for giving families.

These motivations are not mutually exclusive—indeed, in almost all cases it will be a combination of one or more—and none are more right or wrong. However, each motivation has its own implications for how you make other decisions across the lifecycle of your giving (e.g., grantmaking guidelines or the ways you make decisions as a family or board). Exploring your reasons for giving helps you identify your goals and, later, engage others in your mission. If you can express your primary motivations to your family and external partners, they'll be better prepared to help you implement your plan, now and in the future.



**Tip:** If you're thinking ahead about involving family members, your motivations will likely be a mix of personal (e.g., inspiration of a mentor), family (e.g., preparing children for charitable uses of wealth), and external (e.g., improving healthy births in your state).



**Action Item:** Ready to think about your motivations? [Worksheet 1](#) provides questions to prompt your and/or your family's thinking.

## Clarifying Your Values and/or Principles

*“Values are like fingerprints. Nobody's are the same, but you leave them all over everything you do.”*

– Elvis Presley

**Values** are the characteristics and behaviors we feel are most important in life. They influence all of our decisions and actions. *Honesty. Equality. Loyalty. Responsibility.* These are but a few examples of countless values that might resonate with you. Think of them as the lenses through which you view your life.

Everything we do originates from values, often learned through role models or hard-earned experiences. Acting in alignment with our values gives us purpose as people and as families. Creating a **values statement** helps affirm your personal or family's values and informs your work and how you interact with others.

For some people, a list of values isn't tangible enough. Others want to start with a moral compass that can guide their or their family's generosity. A **credo** or **statement of guiding principles** can serve both goals. It documents the timeless rules, beliefs, and/or practices that help us know what is right and wrong and that govern our behavior. These statements are action-oriented and declare decisions to be made. Examples of principles from family foundations include:

- “We focus on outcomes to maximize the effectiveness of our giving.”
- “Don't reinvent the wheel, instead build on existing partnerships.”
- “We respect our grantees as equal partners in the work we do.”
- “Tikun olam – leave the world in a better condition than we found it.”
- “We will encourage bold innovation.”

While values and principles might not be top-of-mind for those starting off in philanthropy, we encourage you to consider them individually and as a family. Too often, an enthusiastic donor or family jumps to “what do we want to fund?” Yet values and principles aren't about giving to the homeless or the library or your alma mater; they are the underlying virtues that *lead you* to those decisions.



**Action Item:** Ready to identify and state your values and/or principles? [Worksheet 2](#) provides questions to prompt your and/or your family's thinking.

## Philanthropic Principles Statements

Some philanthropy trade associations have created lists of principles which they encourage donors or foundations to adopt. Some lists are related to a set of values, some describe a style of giving or granting, and some are a blend.

A few examples include:

- [Criteria for Philanthropy at Its Best](#): created by the National Committee for Responsive Philanthropy.
- [Impact-Driven Philanthropy Principles](#): created by the Impact-Driven Philanthropy Collaborative and Donor Effectiveness Network.
- [Principles of Trust-Based Philanthropy](#): created by the Trust-Based Philanthropy Project, a group of grantmakers addressing the inherent power imbalances between foundations and nonprofits.
- [Social Justice Philanthropy Principles](#): created by Resource Generation, a progressive connector between philanthropy and social justice organizers.
- [Statement of Principles of Philanthropic Freedom](#): created by the American Legislative Exchange Council which promotes principles of limited government, free markets, and federalism.

## Identifying Priorities

There are so many worthy causes to support—how will you choose? While you may feel an instinct to fund each and every cause you care about, the most effective donors focus their energy and resources toward just a few.

Effective donors often choose to identify a *short* list of priorities based on one or more of the following categories—**populations, places, and/or issues**. They also document what they *don't want to fund*—what's out of bounds for their giving.

Choosing your priorities is both an *internal and external* exercise. You can start with any of these options or do them at the same time:

- **Internal Reflection:** reflect on the places, populations, and issues that have shaped you over time; the opportunities and blessings you've received; and/or the obstacles you or others you care about have overcome.
- **Internal and External Exploration:** understand the world around you by researching trends in data, interviewing experts, talking with people most affected by a problem, and/or attending a webinar or workshop.
- **External Action:** find your priorities through real-world experiences; e.g., visiting a community to get a first-hand look at an opportunity, volunteering before giving, or joining a giving circle or collaborative grantmaking fund.

The most important step is to draft a list of your own priorities and why those are important to you. The language doesn't have to be perfect, but it will give you an initial premise that you can test and evolve over time.

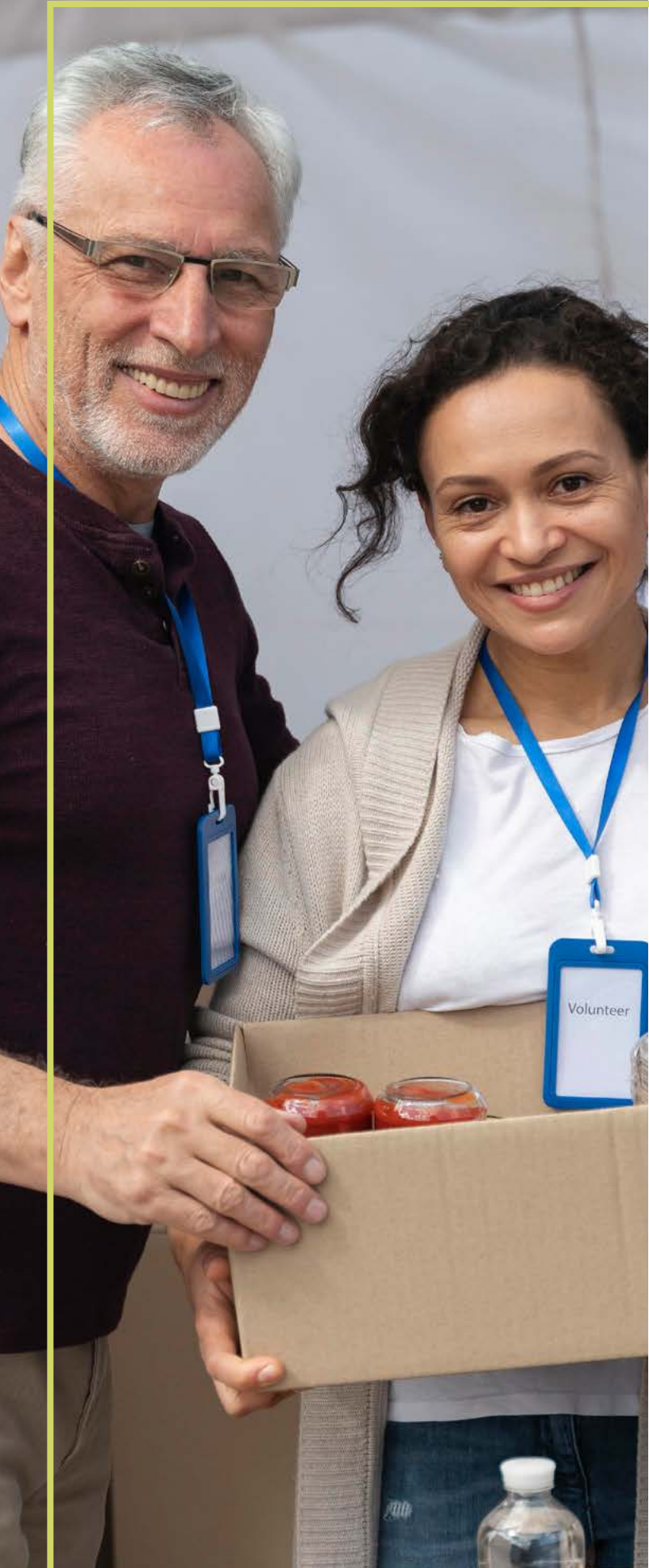


**Tip:** Donors who sustain excitement for their philanthropy find a good connection between the internal and external. They marry their personal motivations and values to a well-documented, compelling need or opportunity. Or they find personal reward in following the lead of other people with more experience and expertise.



**Action Item:** Ready to identify your priorities? [Worksheet 3](#) provides questions to prompt your and/or your family's thinking.





## Philanthropy Trend: Proximity to Community and Beneficiaries

Effective philanthropy must leverage the power and voices of its end beneficiaries<sup>2</sup>. Donors and funders are more frequently breaking down barriers between classes, cultures, and geographies to listen and act with people closest to problems.

Donors are volunteering alongside of families in poverty through programs such as Circles USA or in Circles of Care for people with health or mental health conditions. They're giving through crowdfunding and peer lending sites and alongside their neighbors through mutual aid groups.

About two-thirds of family foundations are formally integrating outside perspectives into their grantmaking or governance. Those foundations are increasingly adding independent (non-family) board members and reporting they feel more effective when they do add those board members.<sup>3</sup>

<sup>2</sup> [The Giving Landscape: 2020 Trends](#), National Center for Family Philanthropy, 2020

<sup>3</sup> [Trends 2020](#), National Center for Family Philanthropy, 2019

# II. Extending the Fundamentals

*“Guiding principles, core values, and vision and mission statements remove specific people from the center hub spot and replace them with the family and their ideals.”*

– David R. York and Andrew L. Howell in *Entrusted: Building a Legacy That Lasts*

Documenting your motivations, values and principles, and priorities—even in rough draft form—is a terrific way to clarify your giving. You’ll use that documentation to review opportunities to give and get involved that come your way and to dream of opportunities you want to proactively pursue. As you give and volunteer over time, you’ll learn new ways to express the ideas or even refine or re-write some.

As you put your motivations, values, and priorities to work, you may find the need for further clarification. The need may come as you involve more family members, as you start receiving more requests to give, or both. Defining your **preferred giving style** and creating a **purpose statement** increase that clarity and increase both the personal reward and impact of your giving.

## Defining Your Giving Style

Defining your giving style helps you understand your preferences for making a difference. It helps you find better ways to enthusiastically say yes and comfortably say no to opportunities.

The graphic below outlines five **traditions** in philanthropy. *None are inherently more important or effective.* There are natural times and places for each tradition to take precedence. They are also not mutually exclusive and can be combined in creative ways. However, each tradition leads to a different way of having an impact on the priorities you care about. Effective philanthropists know which tradition most closely reflects their motivations, values, and principles. And they prioritize their giving, volunteering, and other actions based on their preferred tradition or traditions.

Tradition: Philanthropy as...	Example Guiding Values or Principle(s)	Strategic Bias
<b>Relief</b>	Compassion, protection, benevolence	Alleviate human suffering (or animal or environmental suffering)
<b>Improvement</b>	Progress, opportunity, responsibility	Maximize human potential
<b>Social Reform</b>	Justice or freedom	Solve social problems; change policy and practice; systems change
<b>Civic Engagement</b>	Participation, empowerment	Build community; give voice and authority to those most affected
<b>Innovation</b>	Creativity, flexibility, challenge norms	Support risk, discovery, experimentation

Graphic by Tony Macklin, CAP®, adapted from the classic [Four Traditions of Philanthropy](#) by Elizabeth Lynn and Susan Wisely.

In addition to philanthropic traditions, you'll want to think ahead about the decisions below. As with the traditions, there are no right or wrong answers (despite what you may hear):

- **Timeframe:** Do you prefer to make a bigger impact now, spread your impact over time, or make more of an impact in the future?
- **Collaboration:** Do you prefer to act independently, act with a small group (like friends or family), or collaborate with a larger group with diverse perspectives and experience?
- **Publicity:** Do you want to be completely anonymous, to be known but quiet, or to be very public so you can influence others?
- **Administration:** Can you reasonably accomplish your philanthropic goals on your own or might you want to hire an advisor or for administrative help?



**Action Item:** Ready to think about your giving style? *Worksheet 4 provides questions to prompt your and/or your family's thinking. If you want to dive in deeper, see the separate Family Giving Lifecycle [Impact Strategies & Tools Primer](#).*

## Philanthropic Traditions in Action

Philanthropic consultants often use the old “teach a man to fish” proverb to illuminate the five philanthropic traditions. Different traditions will rise to the front depending on the situation in a community — e.g., during a natural disaster, after political upheaval, or in a booming economy.

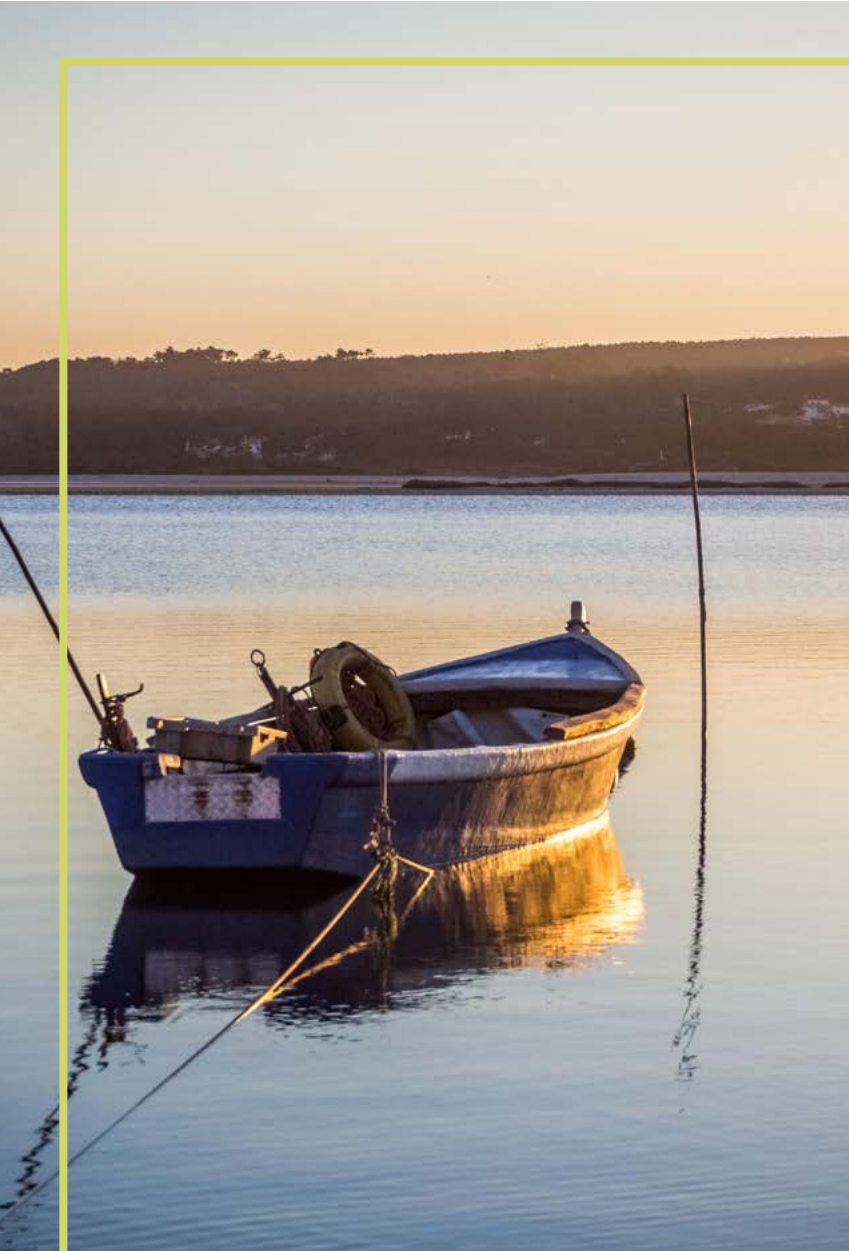
**Relief:** give the hungry family fish or invite them to dinner.

**Improvement:** teach the family to fish and even start a successful fishing business.

**Social Reform:** advocate for fairer fishing policies; ensure the waters aren't polluted by industries.

**Civic Engagement:** help fishing families connect with each other and advocate for their own success.

**Innovation:** invent new sustainable fishing methods or technologies.



# Documenting Your Philanthropic Purpose

Your motivations, values, principles, priorities, and giving styles are all expressions of your philanthropic purpose. Each communicates a different part of your philanthropy—why you act, what you want to change through your actions, and how you will give to make that change happen.

In addition to a statement of values and/or principles, you might create one or more of the following statements:

- 1. Vision statement:** Describes your aspirations—the future you hope to see. It answers, “*What would a better world look like?*” Some donors and families call this their North Star.
- 2. Mission statement:** Defines the purpose of your philanthropy—what you hope to accomplish in the present to bring about your vision for the future. It answers, “*How will we work and give toward that better world?*”
- 3. Donor legacy statement or expression of donor intent:** The Philanthropic Initiative, a consulting firm, describes an expression of donor intent as a “letter or recording created to share your motivations, hopes, and goals with heirs, successor trustees, and/or beneficiaries of your philanthropy in a direct, personal, and enduring way.”<sup>4</sup> Legacy statements and donor intent recordings are often more personal than the vision or mission statement, but based on the same principles and priorities.

It’s best if your vision and mission statements are concise and in clear language that everyone can understand. While a vision statement is often more aspirational, you may feel a mission statement might limit your giving too much. That’s understandable. However, most philanthropists agree that establishing a mission—and a clearly defined narrow mission, at that—makes decision making much easier and giving more effective.

Your expression of donor intent will be longer. Effective donors are more frequently adding audio or video recordings to written documents. They tell stories about personal character, values, and passions, and they offer guidance on principles and priorities. They often offer insights into contingency plans if a goal is no longer achievable (e.g., due to a law change), if the original goal is met (e.g., a cure for a disease is found), and/or if future generations don’t have the interest or ability to continue managing the giving.

Articulating one or more of these statements takes time, thoughtful discussion, and sometimes the help of a professional advisor, consultant, or facilitator. Yet it’s worth the effort. Every gift or grant you make, every decision maker you involve, every policy you put into place around your philanthropy all stems from these statements. A vision and mission are no guarantee you will change the world, but you can’t get anywhere if you don’t know where you’re going.



**Tip:** *Have you documented your values, principles, vision, mission, or donor intent? Consider working with your attorney to include that information in documents such as a purposeful trust, ethical will, or the founding documents of a donor-advised fund or foundation. And consider working with your financial advisor to incorporate the information into your investment strategies, perhaps through socially responsible or sustainable investment options.*



**Action Item:** *Ready to develop a vision or mission or similar statement? [Worksheet 5](#) provides questions to prompt your and/or your family’s thinking.*

<sup>4</sup> [Across Generations: A Five-Step Guide for Creating an Expression of Donor Intent](#) – The Philanthropic Initiative and Personal Legacy Advisors, 2020





## Tips for Crafting a Family Foundation's Charitable Purposes

Contributed by [John Sare](#), Patterson Belknap Webb & Tyler LLP, to NCFP's Knowledge Center

- Bear in mind that vague charitable purposes and excessively limited ones routinely yield confusion, discord, and litigation—sometimes during the founder's lifetime, more often in a family foundation's second or third generation.
- Invest ample time and thought in the development of a statement of charitable purposes, and, if appropriate, a mission statement. Write down your ideas.
- Encourage family, friends, and others whom you trust to ask hard questions about your philanthropic ideas and to participate actively in the process of identifying the right charitable purposes and deciding how they are expressed.



# III. Involving Your Family

Discussing motivations, principles, and giving styles as a family will begin to illuminate your family's identity, culture, and legacy. Just as every person is different, so too is every family. It's a learning experience to discover the distinct blend of ideas that comprise a **family's shared philanthropic purpose**.

Priorities may differ among generations and/or family branches, yet you can usually uncover the deep-seated ideas that hold the family together, regardless of age, personalities, or varying interests. What's most important is to find a shared *why* (motivations, values, principles) that can last over time and then be more flexible about the *how* (giving style). For instance, a family can share an interest in eliminating homelessness, but each family member may accomplish that through different styles of volunteering, giving, or advocacy.

The following steps can help your family explore shared ideas and then define and articulate shared statements. Note that the primer and worksheets are appropriate for people approximately 18 years or older.

- STEP 1:** Have each family member read this primer and suggest where they're most interested in starting a group conversation (e.g., values or giving style). Reach a consensus on that starting point. When in doubt, start with motivations and values.
- STEP 2:** Allow time for family members to complete the relevant worksheet(s) at home on their own. Most people will appreciate having time to think about their answers outside of a group setting. Assure them that there are no right or wrong answers and that it is OK for their answers to feel like drafts.
- STEP 3:** Couples and their teenage or adult children can use the rest of the steps below to draft their own shared answers or statements. They'll often want to do that before a larger family convenes to go through the steps.
- STEP 4:** Combine everyone's responses into one list and highlight shared ideas. You can do that by having people send responses in ahead of time. Or, have them write answers on flipcharts or white boards—without discussion or judgment—at a meeting.
- STEP 5:** Facilitate a discussion about commonalities and differences in the answers, allowing all voices to be equally heard and respected. Encourage them to tell stories about why they made the choices they did. Document questions that may need to be answered later.
- STEP 6:** Consider any consensus on answers or directions as an interim solution. It helps most families to treat the first version as a living draft and to test the ideas in their philanthropy for months or a couple years before refining a written statement.
- STEP 7:** Repeat the process for another worksheet.

## Six Tips for Success

### **#1 TAKE YOUR TIME:**

Know in advance that teasing out these ideas is a process, one that takes patience. Developing shared principles or giving priorities will often take more than one conversation.

### **#2 TALK WITH OTHER FAMILIES:**

It can help to talk with other families who've been through this process. NCFP can suggest donor families willing to talk with you. You can also reach out to your local community foundation or regional philanthropy-serving organization for examples.

### **#3 CONSIDER HIRING A FACILITATOR:**

A trained facilitator can create a safe space to improve communication skills, make sure all voices are heard, and reach consensus on shared ideas and phrases.

### **#4 LISTEN TO STORIES:**

One of the best ways to learn is by inviting each other to tell stories. You can learn a great deal about others' motivations, how they live out their principles, and how they make choices in their philanthropy. For instance, younger generations can use questions from the worksheets to interview grandparents or aunts and uncles.

### **#5 IDENTIFY CONFLICTS AND TROUBLE SPOTS:**

Some families encounter tense conversations around subjects such as religion and politics. Set those aside for later and focus on the subjects that bring you together.

### **#6 DOCUMENT THE PROCESS FOR FUTURE GENERATIONS:**

A video or audio recording of the stories and decisions will give valuable insights. And the results of your decisions will have more staying power if placed in the context the larger family story.

Adapted from [Splendid Legacy 2: Creating and Re-Creating Your Family Foundation](#), National Center for Family Philanthropy, 2017





## Reinforcing Your Family's Philanthropic Purpose

- Frame the statements and place them on the wall in a prominent place in your home or in an office.
- Read them at the start of a family meeting or family foundation meeting.
- Don't just hand them to a new family member or staff or advisor to the family. Sit down and discuss what they mean and what relevant stories the new member can share.
- Give accolades that reward values and principles in action—at an event, in a card or personal note, or in a social media post.
- Find opportunities to volunteer with younger family members that align with your philanthropic purpose. Invite them to describe what they're seeing and feeling in their own terms and listen for opportunities to connect their ideas with the family's values, giving priorities, and/or mission.
- Embed the ideas in the grant-making guidelines of your family business, donor-advised fund, foundation, or charitable trust.



# IV. Looking Ahead

## Congratulations!

If you successfully completed some or many of the worksheets in this primer, you now have a clearer sense of your, and perhaps your family's, philanthropic purpose. Your answers to the questions and statements you create are iterative in nature. You'll want to revisit and evolve them over time. Some families will do so on a regular cycle, e.g., every five years. Others do so in response to certain events, e.g., sale of a family business, marriage that brings in new perspectives, or death of a parent. And others do so in response to big changes in the places, populations, or issues the families care about most.

## What's next?

You'll find ways to put your philanthropic purpose into action in the [rest of the primers in this series](#). Some methods for translating motivations, values, and mission into action include:

**Decision Making and Governance:** Motivations and values are necessary principles that inform how your family makes decisions together and how a foundation or trust will be governed.

**Impact Tools:** Your philanthropic purpose brings clarity around the direction and focus of the of your giving, grantmaking, scholarship or fellowship programs, impact investing, and other ways of making a difference.

**Operations:** It is important to consider how you can bring your values to life through your foundation's practices, be it values-aligned approaches to operations, staffing, or the relationships with the communities you serve.

**Legacy and Next Generation:** It takes additional work to maintain and communicate a philanthropic purpose across generations. One way to do this is to embed the process of revisiting values into the culture of a foundation or family office. It is also important to actively discuss your philanthropic purpose with children, grandchildren, and other advisors and allow them to find ways to act on that purpose that are meaningful to them.



# Resources

## Need help?

Explore the resources below and feel free to [contact NCFP](#) to talk through your ideas, meet other donor families, or get in touch with a philanthropy advisor who can guide you and your family members through this important process.

### Essential Resources

- [Defining and Translating Motivations and Values webinar recording](#)
- [Core Values of a Splendid Legacy by Sarah Cavanaugh in \*Splendid Legacy 2\*](#)
- [Things I Wish Our Founders Had Told Us by Susan Packard Orr in \*Splendid Legacy 2\*](#)
- [Goals and Mission by Ginny Esposito in \*Splendid Legacy 2\*](#)
- [Find Your Focus, Stanford PACS](#)
- [Giving Together: A Workbook for Family Philanthropy, The Philanthropic Initiative](#)

### Further Exploration: National Center for Family Philanthropy Content Collections

- [Getting Started: Choosing Your Giving Vehicle and Creating Your Mission](#)
- [Values and Motivations](#)
- [Ethics and Accountability in Family Philanthropy](#)
- [Getting Started with Family Philanthropy](#)



# Worksheet 1: Motivations

Your motivations are the *inspiration and rationale* behind why you give—the purpose and the aim, the core of why you commit to philanthropy\*. They may change over time. Take time to reflect on these questions about the motivations for your philanthropy. There are no right or wrong answers and it is OK to skip a question if it doesn't feel helpful.

**1. What motivates me to be generous? Why do I care?**

e.g., to help my community to address a known problem; to catalyze social change; to promote family values; tax deductions.

**2. Who were my roles models for generosity when I was young? What did I learn from them?**

e.g., maternal grandmother, a mentor or coach

**3. What life experiences have inspired my philanthropy?**

e.g., battling a disease; receiving financial assistance from others; observing extreme poverty

**4. What am I grateful for now?**

**5. What is my definition of *wealth with responsibility*? What is the purpose of our wealth?**

**6. Beyond money, are there other resources that I have given or could give?**

e.g., strategic advice, artistic skills, board service, personal or professional connections

**7. How would I like to be remembered?**

e.g., benefactor of the poor; patron of the arts; protector of civil liberties

\* *Philanthropy is “voluntary action for the public good.” It can be informal and/or formal and include giving, granting, volunteering, investing for social/environmental impact, building social enterprises, advocacy, and/or do other actions.*

## Worksheet 2: Personal Values

Your values are what's important in your life—ideas that are fundamental to your character and your decision making. They're internal and subjective and may or may not be actionable. They may change over time. On the worksheet below, check off all the values that resonate with you, and then list three to five that are most important (it might be hard to decide, but you can do it!).

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Acceptance       | <input type="checkbox"/> Harmony                | <input type="checkbox"/> Respect         |
| <input type="checkbox"/> Adaptability     | <input type="checkbox"/> Honesty                | <input type="checkbox"/> Responsibility  |
| <input type="checkbox"/> Boldness         | <input type="checkbox"/> Humility               | <input type="checkbox"/> Recognition     |
| <input type="checkbox"/> Choice           | <input type="checkbox"/> Independence           | <input type="checkbox"/> Relationships   |
| <input type="checkbox"/> Community        | <input type="checkbox"/> Innovation             | <input type="checkbox"/> Risk            |
| <input type="checkbox"/> Compassion       | <input type="checkbox"/> Integrity              | <input type="checkbox"/> Rule of law     |
| <input type="checkbox"/> Conservation     | <input type="checkbox"/> Joy                    | <input type="checkbox"/> Sacrifice       |
| <input type="checkbox"/> Courage          | <input type="checkbox"/> Justice                | <input type="checkbox"/> Security        |
| <input type="checkbox"/> Creativity       | <input type="checkbox"/> Leadership             | <input type="checkbox"/> Self-expression |
| <input type="checkbox"/> Democracy        | <input type="checkbox"/> Legacy                 | <input type="checkbox"/> Self-reliance   |
| <input type="checkbox"/> Determination    | <input type="checkbox"/> Liberty                | <input type="checkbox"/> Service         |
| <input type="checkbox"/> Discipline       | <input type="checkbox"/> Love                   | <input type="checkbox"/> Spirituality    |
| <input type="checkbox"/> Dignity          | <input type="checkbox"/> Loyalty                | <input type="checkbox"/> Stewardship     |
| <input type="checkbox"/> Diversity        | <input type="checkbox"/> Merit                  | <input type="checkbox"/> Sustainability  |
| <input type="checkbox"/> Effectiveness    | <input type="checkbox"/> Mindfulness            | <input type="checkbox"/> Teamwork        |
| <input type="checkbox"/> Empathy          | <input type="checkbox"/> Morality               | <input type="checkbox"/> Tradition       |
| <input type="checkbox"/> Empowerment      | <input type="checkbox"/> Obligation             | <input type="checkbox"/> Trust           |
| <input type="checkbox"/> Entrepreneurship | <input type="checkbox"/> Opportunity            | <input type="checkbox"/> Truth           |
| <input type="checkbox"/> Equality         | <input type="checkbox"/> Order                  | <input type="checkbox"/> Wisdom          |
| <input type="checkbox"/> Excellence       | <input type="checkbox"/> Patience               | <input type="checkbox"/> Work ethic      |
| <input type="checkbox"/> Faith            | <input type="checkbox"/> Patriotism             | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Forgiveness      | <input type="checkbox"/> Personal growth        | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Freedom          | <input type="checkbox"/> Pleasure               | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Free enterprise  | <input type="checkbox"/> Privacy                | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Generosity       | <input type="checkbox"/> Protect others' rights | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Gentleness       | <input type="checkbox"/> Prudence               |  |

## Worksheet 2: *Personal Values* — *Continued*

- 1. Of those values I checked above, what are the top three to five that are most important to me—those that drive my daily decisions and actions?**

- 2. How do I personally define those terms?**

- 3. Why are the values I chose especially important to me?**

- 4. Are there ways I want to ensure I put those values into action—turn them into guiding principles or a family credo? What should it look like to make decisions in my philanthropy based on those values?**

- 5. Are there any values on the list that should not show up in my philanthropy\*? Why?**

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# Worksheet 3: *Philanthropic Priorities*

Effective donors identify a short list of priorities for their philanthropy\*. They also document what they don't want to support. Take time to reflect on these questions about your priorities. There are no right or wrong answers and it is OK to skip a question if it doesn't feel helpful.

**1. Are there specific *populations* I most want to help? Why?**

e.g., infants in my county, Jewish immigrants, jobless veterans, an endangered species...

**2. Are there specific *places* I most want to help? Why?**

e.g., a country experiencing a crisis, cities in which my family business was built, a specific lake or forest...

**3. Are there specific *issues* I most want to support or *problems* I want to solve? Why?**

e.g., arts access, civil rights, scientific research, global health, homelessness...

**4. Are there specific *institutions* or *ideals* I most want to preserve? Why?**

e.g., a museum, the independent press, a faith, a cultural tradition...

**5. Are there populations, places, or issues I want to make certain my philanthropy does not support? Why do I want to avoid those?**

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# Worksheet 4: Philanthropic Style

Knowing your philanthropic style—your preferences for making a difference—gives you a clearer way to say yes or no as requests to give or get involved increase. Take time to reflect on these questions about your style. There are no right or wrong answers and it is OK to skip a question if it doesn't feel helpful.

**1. Which of these classic philanthropic traditions most closely connect with your motivations, principles, and priorities? Rank them starting with 1 as the top priority.**

- Relief** (alleviate suffering)
- Improvement** (maximize potential)
- Social Reform** (change policy, practice, systems)
- Civic Engagement** (build community, give voice)
- Innovation** (support risk, discovery, experimentation)
- I don't have a preference.** I will always let the nonprofit or community guide me on the tradition most needed.

**2. Along each continuum below, place a dot that best represents how you hope your philanthropy looks and feels in the next few years.**

**TIMEFRAME**

**COLLABORATION**

**RECOGNITION**

**ADMINISTERING YOUR PHILANTHROPY**

**3. Why did you choose the answers to questions 1 and 2? How do you see your answers connecting with your motivations, values, and priorities from worksheets 1-3?**



# Worksheet 5: Vision and Mission

Your motivations, values, principles, priorities, and giving styles are all expressions of your philanthropic purpose. Developing a vision and/or mission statement helps connect the dots between your motivations, values, principles, priorities, and philanthropic style. Before drafting a vision and/or mission statement, draft some answers to worksheets 1–4 or have handy other materials that provide similar information.

## 1. What is the change we hope to achieve, and for whom?

## 2. If we achieve this change, what will a better world look like?

## 3. Draft Vision Statement

Your vision statement describes your aspirations—the future you hope to see. It answers, “What would a better world look like?” Ideally, it is clear, inspiring, and meaningful to you. It doesn’t have to be practical or attainable by you alone. A vision statement can be a sentence or a paragraph. Here are some starter phrases you can use (or write your own):

- *Our vision for a better world is...*
- *We see a community in which...*
- *One day, every (noun) will (verb)...*
- *Our North Star is...*

## 4. Draft Mission Statement

Your mission defines the purpose of your philanthropy—what you hope to accomplish in the present to bring about your vision for the future. It answers, “How will we work and give toward that better world?” It is more practical than a vision statement. Ideally it is one or two sentences, avoids jargon, and helps you make choices in your philanthropy. Here are some common formulas for mission statements (or use your own):

- Action + target population + geography + result or goal to achieve. (e.g., “*Our giving supports mentoring of elementary school children in Ohio so they become productive, confident adults.*”)
- Motivations + priorities. (e.g., “*To honor our mother’s passion and career as an artist, we provide fellowships to MFA students in our region to travel abroad.*”)
- The change we want to see (or our vision) + our role + our approach. (e.g., “*Our city deserves clean rivers and streams. We’ll be a leading advocate for clean waterways, using our money, our personal connections, and our advocacy.*”)
- Values + priorities + giving style. (e.g., “*We are humble servants of God, called to give the least of our brothers and sisters in Southeast Asia. We entrust the missions there to listen closely to local residents and lift up their needs.*”)

# Credits

## About the National Center for Family Philanthropy

NCFP is a network of philanthropic families committed to a world that is vibrant, equitable, and resilient. We share proven practices, work through common challenges, and learn together to strengthen our ability to effect meaningful change. Our range of programs and services support family philanthropy at its many points of inflection and help families embrace proven practices and advance momentum. Explore our resources, all rooted in a [Family Giving Lifecycle](#) by visiting [www.ncfp.org](http://www.ncfp.org).

## About the Authors

**Elaine Gast Fawcett** is a philanthropy advisor and communications strategist serving family foundations, nonprofits, and grantmaker associations. For 20 years, she has shared the stories and best practices of family philanthropy as the published author of 12 field-respected books for grantmakers, and hundreds of articles, tools, case studies, and guides. Elaine is a contributing writer for NCFP, a 21/64 multigenerational facilitator, and principal of PhilanthroComm.

**Tony Macklin**, a Chartered Advisor in Philanthropy®, consults with donor families, grantmakers, and their advisors about purpose, use of resources, action planning, and learning. As executive director of the Roy A. Hunt Foundation, he facilitated changes in visioning, impact investing, grantmaking, trustee education, and back-office management. In twelve years at the Central Indiana Community Foundation, he led grantmaking initiatives, advised wealthy donors, attracted \$39 million, and launched a social enterprise. Tony also serves as senior program consultant for NCFP, senior consultant with Ekstrom Alley Clontz & Associates, senior advisor to the Impact Finance Center, and peer reviewer for *The Foundation Review*.

**Nick Tedesco** is the President and CEO of the National Center for Family. Nick is a passionate advocate for philanthropy and brings over a decade of experience partnering with donors and their families to establish and meet their giving goals. Previously, Nick served as a senior advisor at the J.P. Morgan Philanthropy Centre and helped to launch the Giving Pledge at the Bill and Melinda Gates Foundation.

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