

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.*”)