

Worksheet 3: Donor Intent Considerations

(Use if your social impact vehicle will have a lifespan after your death.)

The Greek philosopher Heraclitus gave us the truism, “There is nothing permanent except change.” You know you can’t predict or control the future. But you can advise your successors about the flexibility they will have to adapt to the inevitable changes in communities, issues, public policies your philanthropy serves.

This worksheet helps you outline how closely you’d like your successors to follow current priorities, policies, and practices in your philanthropy. It can be stored alongside legal documents such as bylaws but is not itself legally binding. Work with your financial advisor or attorney if you wish to include any of the decisions below in personal estate planning or organizational legal or financial documents.

For each topic in the chart below, enter the number for one of these four decisions or type “N/A” for not applicable:

1. **Highly flexible:** I trust the successors I’ve chosen. They have the freedom to continue as-is or substantially change the policy or practice to best meet future needs and conditions.
2. **Somewhat restricted:** My successors can adapt the current policy or practice to ensure the philanthropy remains relevant and effective, but I do not wish for them to change substantially or replace the current policy or practice.
3. **Highly restricted:** My successors should continue the current policy or practice unless circumstances have so changed that it becomes unnecessary, impractical, or impossible to do so. (This is like the “variance power” held by sponsors of donor-advised funds).
4. **Other:** A decision that doesn’t fit one of the first three.

You can also provide restrictions or other notes and add your own practices, policies, or priorities.

Current Practice/Policy	Decision	Notes or Restrictions
Philanthropic Purpose		
Values statement or list		
Vision statement		
Mission statement		
Governance		
Board* composition		
Board* eligibility		
How anonymous or public our philanthropy is		

Social Impact Vehicle		
Lifespan of current vehicle(s)		
Use of new vehicles		
Philanthropic Strategy and Assessment		
Priority issue or population		
Priority geography(ies)		
Tools and activities to achieve our strategy		
Types of partners we support		
Measures of progress and success		
Operations		
Staffing model		
Investment policy		
Other Issues Related to People, Purpose, Policy, or Practice		

** Or the equivalent oversight or final decision-making authority*

Next steps: How and when will I discuss these decisions with other decision-makers in my philanthropy? With advisors or staff? With successors?