



Understanding Your Philanthropic Purpose, Motivations, and Values

WORKSHEET

1. The **headlines** we want to see in five or so years....

NEWS		
Headline	Key story elements	
Photo		
Headline	Headline	Headline
Key story elements	Key story elements	Key story elements

2. What would it take to make this happen?

What would it take for you to contribute to these outcomes?

PURPOSE

Motivations

3. What motivations play an important role in your giving?

Why?

4. Consider one of your headline stories. What motivations might play a role in your giving to address that issue?

Common motivations

Social consciousness
 Faith and Spirituality
 Privilege and Social Consciousness
 Family Traditions and Legacy
 Mentors and Heroines
 Personal Interests and Experiences
 Community and Social Connections
 Business Skills and Experiences
 Compelling Needs
 Impact

Values

5. Which of your values play an important role in your giving?

Why?

6. Consider your headline story. Which values might play a role in your giving to address that issue?

Common values

Achievement	Generosity	Peace
Accountability	Growth	Privacy
Authenticity	Harmony	Resourcefulness
Community	Honor	Respect
Compassion	Humility	Responsibility
Courage	Inclusion	Rule of law
Creativity	Independence	Sacrifice
Dignity	Innovation	Security
Discipline	Integrity	Self-expression
Diversity	Interdependence	Self-reliance
Effectiveness	Joy	Service
Empathy	Justice	Simplicity
Empowerment	Leadership	Spirituality
Equity	Liberty	Stewardship
Faith	Love	Sustainability
Family	Loyalty	Teamwork
Flexibility	Merit	Tradition
Forgiveness	Mindfulness	Trustworthiness
Freedom	Morality	Truth
Free enterprise	Opportunity	Wisdom
Fun	Order	
	Patriotism	

Giving priorities

7. What are your giving priorities?

People	Places	Issues
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Who or what informs them? (Check all that apply.)

- My own interests
- My family's interests
- People with lived experience
- Data or research
- Other _____

8. What role might these giving priorities play in giving to address your headline issue?

Giving approaches

9. What **giving approach(es)** resonate with you?

- Giving approaches**
- Relief
 - Improvement
 - Social reform
 - Civic engagement
 - Innovation

Engaging your family

10. Name the **family members** you want to engage in this shared purpose activity.

11. How aligned do you think you are on your **listed values**?

*Not at all aligned**Somewhat aligned**Fully aligned*

12. How aligned do you think you are on your **listed priorities**?

*Not at all aligned**Somewhat aligned**Fully aligned*

13. How aligned do you think you are on your **listed approaches**?

*Not at all aligned**Somewhat aligned**Fully aligned*

14. How might you bring your **family into greater alignment** on a shared philanthropic purpose?

Statement of Shared Philanthropic Purpose

These statements reflect our hopes for our family's philanthropic work.

A BETTER WORLD	
CONTEXT The issue(s) that concern(s) us in our community and/or world and the context of that issue	
VISION What a better world (or situation with this issue) looks like	
OUR FOCUS	
MISSION How we will work for a better world	
VALUES What will guide our decision-making	
GIVING PRIORITIES What we will prioritize in our giving	
GIVING APPROACHES How we prefer to give	
NOTES What people who weren't part of the discussion should know about the choices in these statements	
OUR COMMITMENT TO WORKING WITHIN A COMMUNITY OF OTHERS	
LEARNING PLAN What we need to learn to refine these statements	
CONNECTION PLAN The people or organizations doing this work we need to connect with to deepen our understanding of the work	