



Understanding Your Philanthropic Purpose, Motivations, and Values



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

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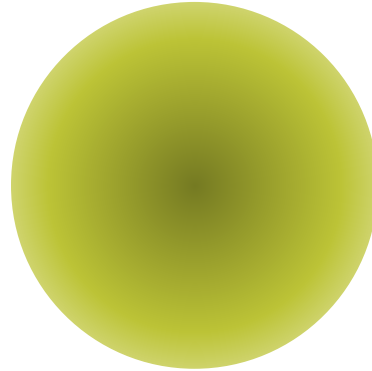
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Today's goals



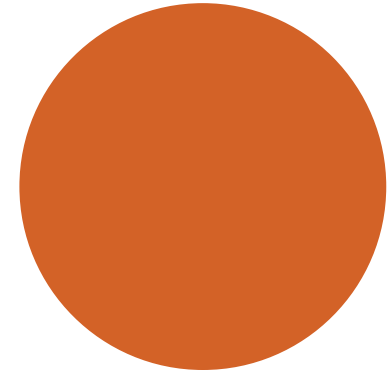
Imagine a better world

- ⦿ What difference we hope to make in the world



Define your purpose

- ⦿ Why you give
- ⦿ What matters most to you in your giving



Align your family around a common purpose

- ⦿ How to create agreement among family members with different interests

THE FAMILY GIVING LIFECYCLE



Philanthropic Purpose

Defining Your Motivations, Values, Principles, and Priorities

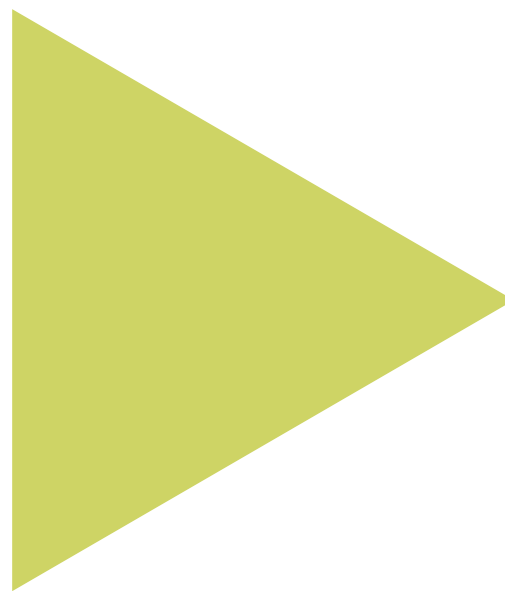
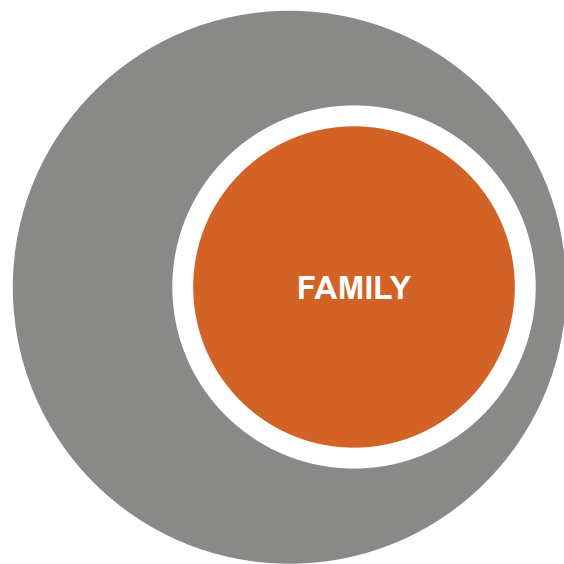
Why do you want to make a difference?



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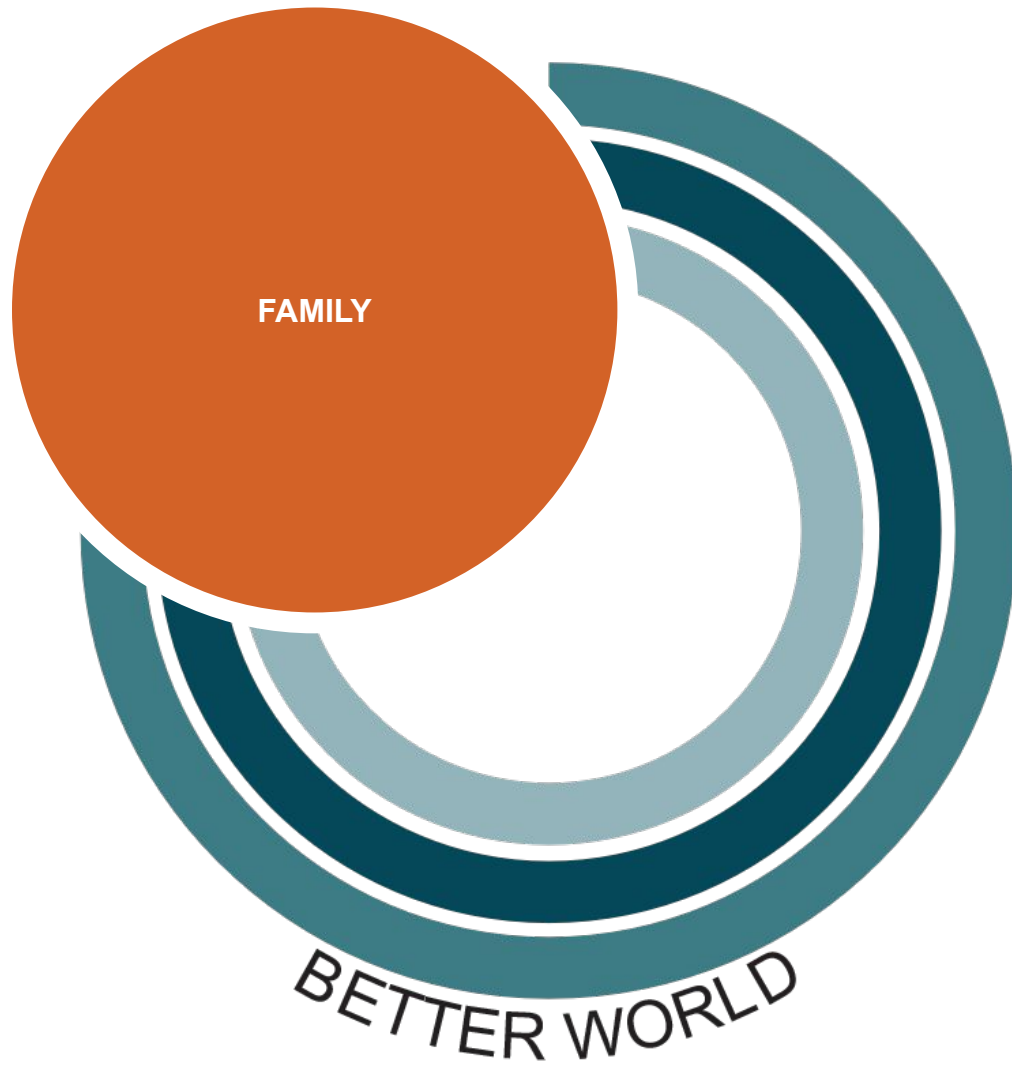
Family philanthropy



Your purpose guides your
family's decision-making.



Better world



FAMILY

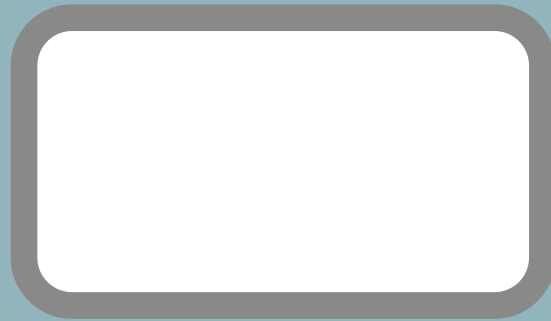
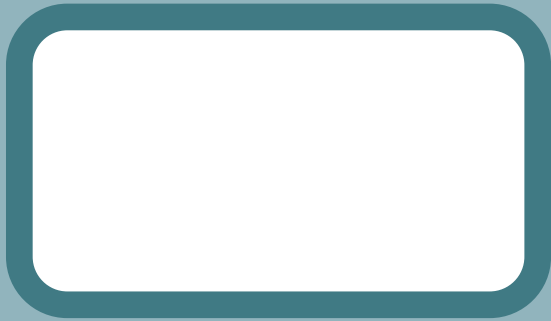
BETTER WORLD

YOUR TURN

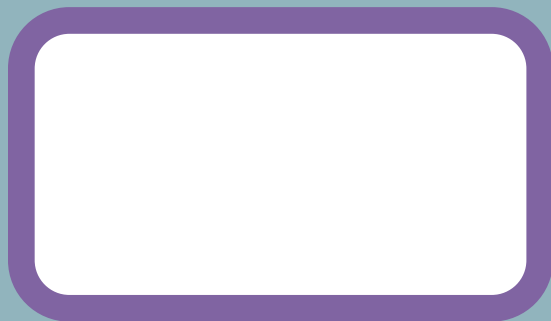
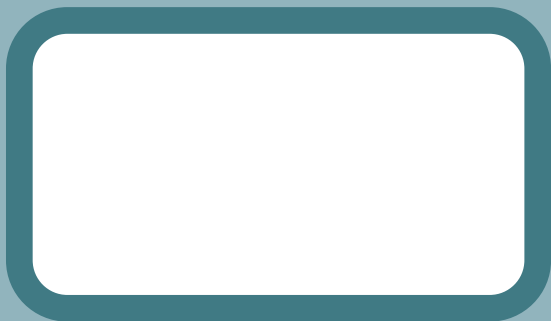
NEWS		
Headline		Key story elements
Photo		
Headline	Headline	Headline
Key story elements	Key story elements	Key story elements

YOUR TURN

What would it take to make this happen?



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



Effective family philanthropy makes
a collective commitment to
meaningful societal change.



Effective family philanthropy makes a collective commitment to meaningful societal change. It holds itself accountable to impact as defined by community, and to the proven practices that support it. It is adaptive, evolving with the family and the community or ecosystem within which it operates. It shares or cedes power with different family members and generations, as well as staff, communities and grantees.



Accountability

Equity

Reflection/
learning

Relationships

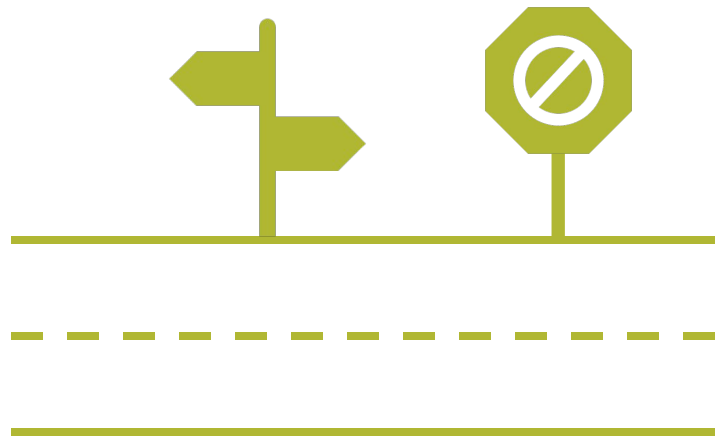
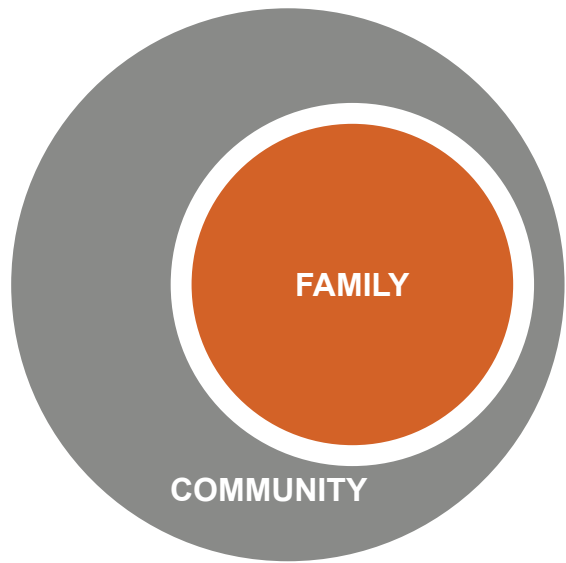
A close-up photograph of a red pushpin stuck into a map. The map shows various colored lines representing roads and rivers. In the background, several other pushpins in different colors (green, yellow) are visible but out of focus. A semi-transparent green rectangular box is overlaid on the left side of the image, containing the word "Purpose" in white text.

Purpose

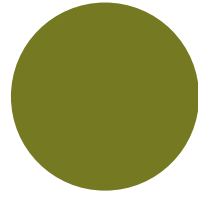
Purpose

Why something is done
The reason something
exists





Purpose



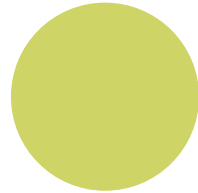
MOTIVATIONS

Why we give



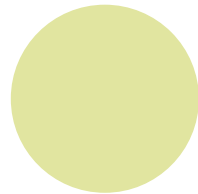
VALUES

What matters most to us



PRIORITIES

Preferences for populations, places, problems, or solutions



GIVING APPROACHES

Preferences for how you make to make a difference

1

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

1

MOTIVATIONS

Social consciousness

Faith and Spirituality

Privilege and Social Consciousness

Family Traditions and Legacy

Mentors and Heroines

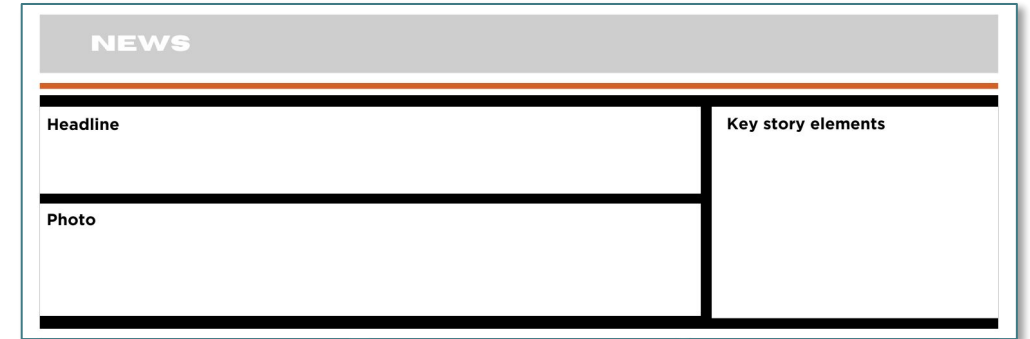
Personal Interests and Experiences

Community and Social Connections

Business Skills and Experiences

Compelling Needs

Impact



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

2

VALUES

Achievement	Flexibility	Joy	Responsibility
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Family			Wisdom

NEWS	
Headline	Key story elements
Photo	

3

PRIORITIES

What are your giving priorities?

_____ people.

_____ places.

_____ issues.

Who/what informs them

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

A fire in the community

Need for
food,
housing, &
health care

Housing
needs to be
improved/
Children
need
support

Policies
and
practices
contributed
to unsafe
conditions

Community
nonprofits &
civic groups
are
engaged

New
housing
models
may lead to
more
investment.

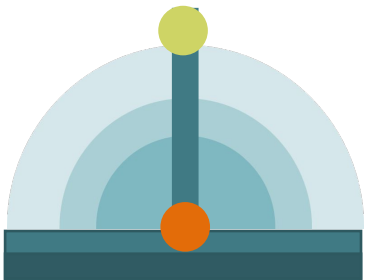


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GIVING APPROACH

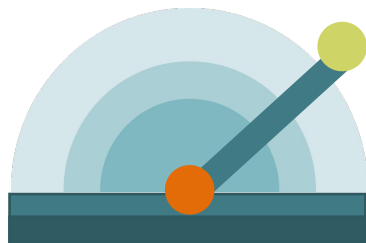
RELIEF

Alleviate human suffering



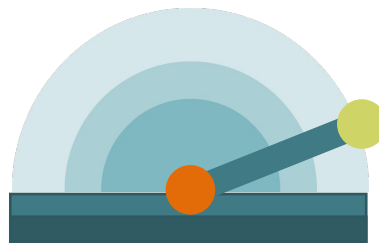
IMPROVEMENT

Maximize human potential



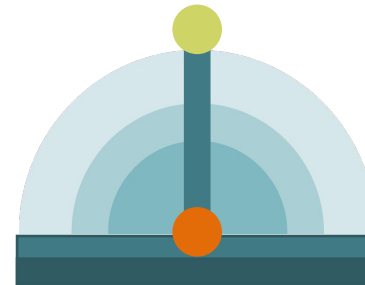
SOCIAL REFORM

Solve social problems



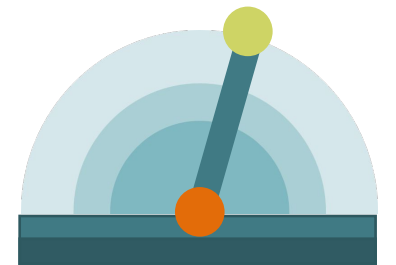
CIVIC ENGAGEMENT

Build community; give voice/ authority to those most affected



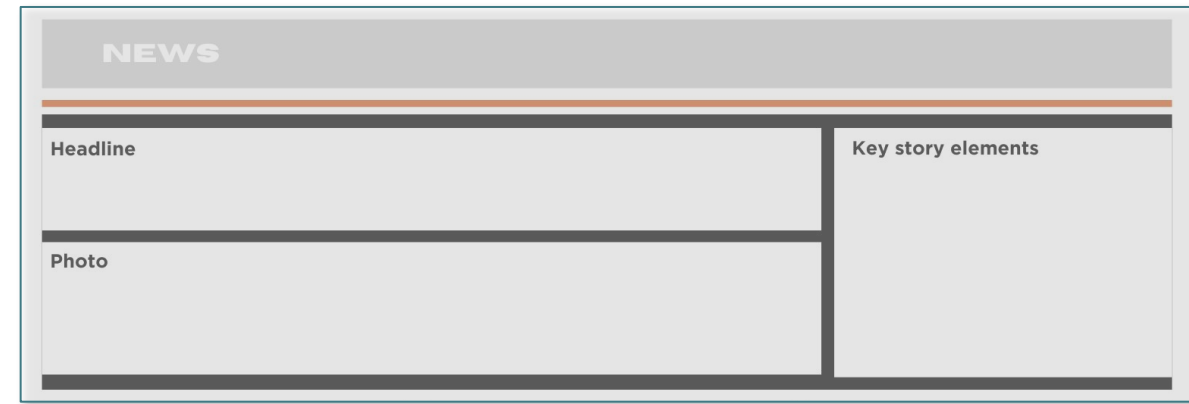
INNOVATION

Support discovery and experimentation



4

GIVING APPROACH



RELIEF

IMPROVEMENT

SOCIAL
REFORM

CIVIC
ENGAGEMENT

INNOVATION

Alleviate
human
suffering

Maximize
human
potential

Solve
social
problems

Build
community;
give voice/
authority to
those most
affected

Support
discovery and
experimentation

YOUR TURN

Motivations | Values | Priorities | Approaches

- What was hard about this exercise?
- How did what you wrote down differ from how you are giving now?

Your purpose guides your
family's decision-making.



family

Statement of Shared Philanthropic Purpose

We are motivated by _____.

Important values to us are _____.

Our priority is to support _____.

Our preferred giving approach(es) is (are) _____.

YOUR TURN

How might you bring your family into greater alignment on a 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	

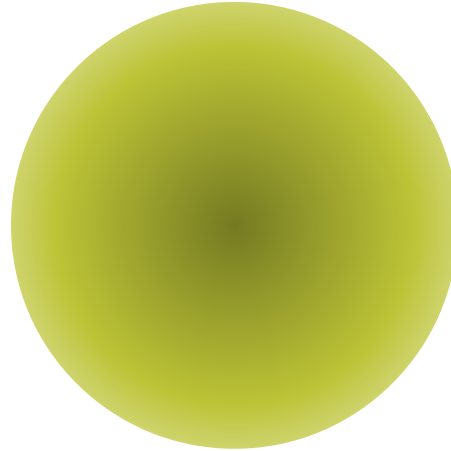
Page 4

Summary



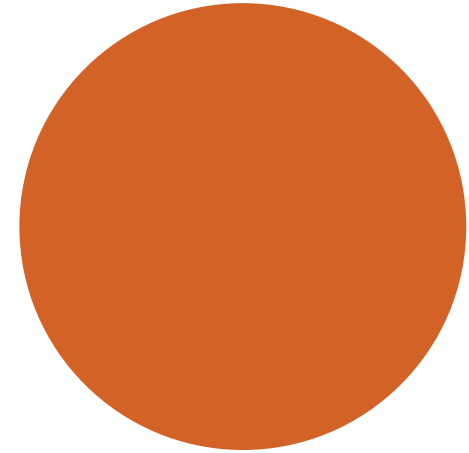
Imagine a better world

- ⦿ Name the issues you care about and what success looks like.
- ⦿ Connect your philanthropic purpose to the change you want to see in the world.



Define your purpose

- ⦿ Name your motivations, values, priorities, and approaches.
- ⦿ Recognize that they are contextual.



Align family around a common purpose

- ⦿ Find common ground through conversation and curiosity.
- ⦿ Talk about the big questions early in your philanthropic process (size, legacy, etc.)

YOUR TURN

What next steps
will you take?

Who will you
involve?



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