

## Community Foundations of Canada – 2006 Conference

*Values Based Giving:  
How Community Foundations Can Engage Donors*

May 11, 2006 2:00-4:00 pm

### **PARTICIPANTS' AGENDA**

Self-Introductions

Session Introduction

- ❖ What
- ❖ Why
- ❖ When
- ❖ Where
- ❖ How

Getting Started

Exercise – Determining Giving Interests

Exercise re Values

Other Considerations

Exercise - Creating a Mission & Vision

Exercise - Finding a Focus for Funding



**Exercise:**

*Analysis of Current Giving*

**15-20 Minutes**

**A. Recent Giving**

To get a sense of where your giving has gone in the last year, fill out the chart below.

Organizations donated to in the last 12 months	Amount given	Why I gave

*B. Characteristics of the Groups You Give to*

Beginning with the list of organizations you supported, map your top ten groups on the chart below (see the list of strategies groups may employ following this exercise). Once you've done so, you'll begin to see the patterns of your giving.

Organization	Issues It Addresses	<b>Size by Budget</b> <i>Small:</i> Less than \$250,000 <i>Medium:</i> \$250,000-\$1,000,000 <i>Large:</i> More than \$1 Million	<b>Age</b> <i>Start Up:</i> 0-2 Years <i>New:</i> 2-5 Years <i>Established:</i> 5-10 Years <i>Sustained:</i> 10 Plus Years	<b>Scope</b> <i>Local,</i> <i>State/Regional,</i> <i>National,</i> <i>International</i>

*Reflection:*

1. Within each set of characteristics, was your giving focused on certain categories, or varied? Were these intentional choices? If they were, what reasons were behind your choices?

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2. What do you see as the pros and cons of the pattern your giving has taken within each category? (For instance, your dollars may have great impact on small, start-up organizations, but start-ups sometimes fail. Giving locally offers you personal connection, yet many serious problems are international in scope, and your dollar goes further overseas.)

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3. Looking at the characteristics of the groups you've funded, is there anything different you would like to do next year? What? Why?

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### *C. Your Relationship with Groups You Gave to*

Look again at the groups you listed in Section B of this exercise, and take stock of the relationship you have with them.

1. With what number of organizations are you a
  - Recipient of the organization's services
  - Volunteer
  - Member
  - Board member
  - Staff member
  - Other:
  
2. With how many do you
  - Know people in the organization
  - Know people who have been affected or helped personally by the organization (or ones like it)
  - Know other donors
  
3. With how many did you find out about them through
  - Direct mail
  - Family, friends, social club, association, or work colleagues
  - Local public foundation
  - Media
  - Other:
  
4. With how many do you
  - Want your donation to be completely anonymous
  - Want your donation held in confidence (only one or two people in the recipient organization know)
  - Don't care whether your donation is known
  - Want people in the community to know you made a donation
  
5. With how many did you stay informed by
  - Reading newsletters or annual reports
  - Attending events
  - Meeting one-on-one with staff or board



Other:

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*Values Exercise*

1. What are your values?
2. What are the values that have guided:
  - how you have lived your life;
  - raised your family; and
  - conducted your business/professional life?
3. What charitable interests have you pursued as an outgrowth of your values?
4. What have you learned from your giving?
5. What would you do differently?
6. What would make you feel confident in expanding your giving?
7. What has been your most satisfying charitable gift experience? Why?
8. What role has philanthropy played in your family?
9. What role would you like it to play? What value do you perceive it would bring to your children? Grandchildren?
10. What core values would you like to express through your giving?
11. When you think about major challenges facing your community, what are your major concerns?
12. Are any of these or should any of these be the focus of your giving?
13. What would you like to accomplish with your giving?
14. How would you like to be involved in or manage your giving?
15. What do you want to be remembered for?



**Exercise:**

*Developing a Mission and Vision*

*25 minutes*

*Creating Your Mission Statement*

Your mission statement should be a brief answer to the question, “What do I want to do with my giving and my time, and why?”

The most effective mission statements are usually no more than two to three sentences – something you can easily remember and others can easily understand.

Review your values and interests as well as your vision.

Write your own philanthropic mission here. It should include reference to:

- your passionate interests
- what you think can help improve or change issues you care most about and
- what you are doing to support improvement or change.

*First Draft*

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*Second Draft*

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*Vision for a Philanthropic Program*

1. What are your hopes and dreams in creating this program? For example, five years out, what would success look like? How would it be measured?

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2. What are your goals for the program?

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3. Do you see this program as having a single purpose or one with fields of interest?

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4. To what extent would you like to be involved in the work of exploring/analyzing problems and shaping promising solutions?

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5. How much direct contact with donees would you like?

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6. Given your other time commitments, how much time do you think you have to devote to the management of the program, and to causes or organizations that the program supports?

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7. Is there a clear understanding of the role of each of the current family members in relation to the program?

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8. Should future family involvement be built into the vision?

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9. What is your desire related to geography: local, national and international or some combination?

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10. Do you think the program is more interested in helping individuals, organizations or in effecting public policy? Or is it some combination?

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11. On a scale of 1 – 10 with 10 being high, how much risk tolerance do you have?

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12. What level of recognition and visibility is of interest?

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**Exercise:**

*Finding a Focus for Funding*

**20 minutes**

1. Write your mission statement

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2. Write your vision statement

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3. Consider your plan for the coming year. Write the total amount of money you've decided to give and the amount of time you plan to volunteer.

Total Giving Plan for \_\_\_\_\_ (year)

Financial donations: \_\_\_\_\_

Volunteering: \_\_\_\_\_

4. Reflect on your mission and vision statements, along with characteristics of your past giving. Identify your top priority areas of interest that you believe will help make a difference in this world.

List no more than five areas of funding. Limiting yourself to five main areas, or fewer, will help to maintain focus and attention.

**Areas of Funding**

1.

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2.

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3.

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4.

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5.

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5. Now think about whether prioritizing your choices will make your strategy more effective. If so, rewrite your list in priority order.

**Areas of Funding**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

6. From the total amount of money you've decided to donate, allocate a percentage to each area based on your assessment in Step 4 of the importance of each to your mission. Then translate each percentage into a dollar amount.

**Final Areas of Funding (in priority order if applicable)**

	Amount	Percentage
1.		
2.		
3.		
4.		
5.		