



GIVING WITH PURPOSE:

Your Guide to Impactful Philanthropy

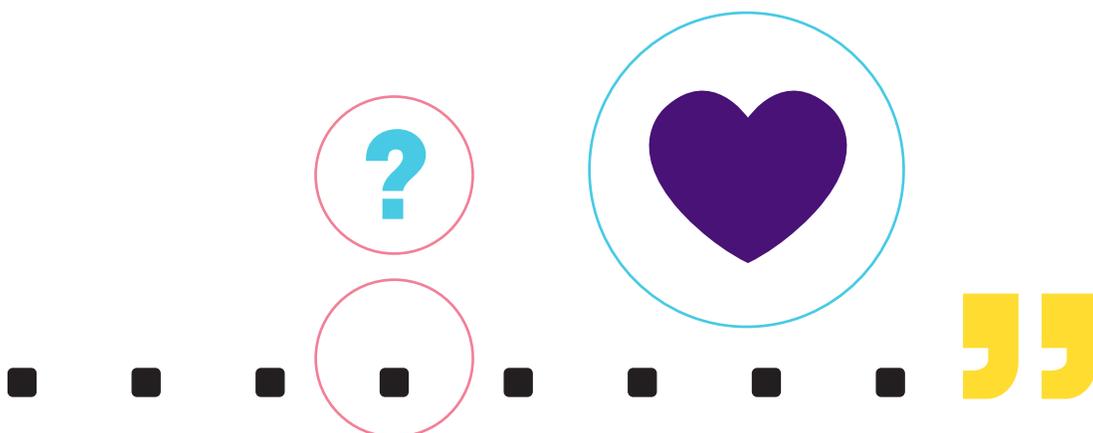
INTRODUCTION

Giving back is important to you, and we deeply appreciate your generous spirit. Thank you for trusting the Community Foundation of Broward to support you in achieving your philanthropic goals.

We hope this Giving Guide inspires you to approach your charitable giving with intention, both now and in the future. The Personal Philanthropy Tools included in this workbook offer a self-guided exercise designed to help you enhance your generosity, refine your philanthropic strategy, engage meaningfully with charitable organizations, and create a lasting legacy.

Whatever your giving goals, the **Community Foundation of Broward** offers tailored charitable funds to meet your needs. We're here to help you give, grow, and grant to create bold community impact. As you continue your giving journey, count on us to support you every step of the way.

Our mission is to **Lead with Love** by transforming our community through focused leadership, fostering collaboration, building endowment, advancing equity, and connecting people who care with causes that matter. Giving is always easy and meaningful with the Community Foundation of Broward.



PHILANTHROPIC MOTIVATIONS

Your motivations are the inspiration and rationale behind why you give—the purpose and the aim, the core of why you commit to philanthropy. They may change over time. Take time to reflect on these questions about the motivations for your philanthropy. There are no right or wrong answers and it is OK to skip a question if it doesn't feel helpful.

1. What motivates me to be generous? Why do I care?

e.g., to help my community to address a known problem; to catalyze social change; to promote family values; tax deductions.

2. Who were my roles models for generosity when I was young? What did I learn from them?

e.g., maternal grandmother, a mentor or coach

3. What life experiences have inspired my philanthropy?

e.g., battling a disease; receiving financial assistance from others; observing extreme poverty

4. What am I grateful for now?

5. What is my definition of wealth with responsibility? What is the purpose of our wealth?

6. Beyond money, are there other resources that I have given or could give?

e.g., strategic advice, artistic skills, board service, personal or professional connections

7. How would I like to be remembered?

e.g., benefactor of the poor; patron of the arts; protector of civil liberties



DEFINING YOUR VALUES

Your values drive your decision-making and shape what motivates you. Focusing on what you value most can help clarify your goals and guide the impact you want to achieve. If you're giving with someone else, take time to compare and discuss your top values, identifying the ones you both strongly share.

STEP 1: Identify Your Core Values

Review the list below and select the values that resonate with you most. These will help shape your philanthropic approach.

- | | | |
|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Acceptance
<i>embracing the ideas and practices of others</i> | <input type="checkbox"/> Equity
<i>distributing resources based on the needs of the recipients to reach an equal outcome</i> | <input type="checkbox"/> Humility
<i>modesty and unpretentiousness</i> |
| <input type="checkbox"/> Achievement
<i>reaching a goal</i> | <input type="checkbox"/> Equality
<i>having same status, rights and privileges</i> | <input type="checkbox"/> Impact
<i>achieving lasting and positive change</i> |
| <input type="checkbox"/> Belonging
<i>being seen and heard as a respected member of a group</i> | <input type="checkbox"/> Excellence
<i>outstanding in quality</i> | <input type="checkbox"/> Integrity
<i>high moral principles and standards</i> |
| <input type="checkbox"/> Community
<i>participation and connection to others</i> | <input type="checkbox"/> Faith/Spirituality
<i>devotion and belief in search of deeper meaning and purpose</i> | <input type="checkbox"/> Innovation
<i>Finding new and creative ways of doing things</i> |
| <input type="checkbox"/> Compassion
<i>sympathy, desire to help those in need</i> | <input type="checkbox"/> Family
<i>value of loved ones and family unity</i> | <input type="checkbox"/> Justice
<i>fairness in treatment</i> |
| <input type="checkbox"/> Cooperation
<i>relying on mutual assistance</i> | <input type="checkbox"/> Friendship
<i>close, supportive relationships</i> | <input type="checkbox"/> Knowledge
<i>possession of information and ideas</i> |
| <input type="checkbox"/> Courage
<i>standing up for beliefs</i> | <input type="checkbox"/> Freedom
<i>ability to act without undue restraint</i> | <input type="checkbox"/> Leadership
<i>ability to guide and influence</i> |
| <input type="checkbox"/> Creativity
<i>ability to develop new and original things</i> | <input type="checkbox"/> Happiness
<i>pleasure and joy</i> | <input type="checkbox"/> Loyalty
<i>devotion and duty</i> |
| <input type="checkbox"/> Dignity
<i>sense of pride and self-respect</i> | <input type="checkbox"/> Harmony
<i>peace and agreement when possible</i> | <input type="checkbox"/> Obligation
<i>committing to fulfill a duty or promise</i> |
| <input type="checkbox"/> Effectiveness
<i>producing intended results</i> | <input type="checkbox"/> Honesty
<i>quality of truthfulness and sincerity</i> | <input type="checkbox"/> Opportunity
<i>chance to advance and change</i> |
| <input type="checkbox"/> Empathy
<i>considering another person's experience from their perspective</i> | | <input type="checkbox"/> Personal Growth
<i>committing to continued learning and evolving your self-awareness</i> |



- Pleasure**
finding joy and satisfaction
- Power**
sharing resources to affect positive social change
- Recognition**
being appreciated and seen for your efforts
- Relationships**
caring for spending time on oneself and with family and friends
- Resilience**
recovering and rebounding during times of hardship
- Respect**
consideration of others
- Responsibility**
accountability with authority
- Risk**
willing to tackle new venture, the unknown
- Security**
feeling safe
- Self-Reliance**
ability to make decisions and act independently
- Tolerance**
acceptance of different people and views
- Tradition**
Respecting customs and stories passed down from generation to generation

STEP 2: Reflect on Your Values

1. Of the values you selected, what are the top three to five that are most important to you—those that drive your daily decisions and actions?

2. How do you personally define these values?

3. Why are these values especially important to you?

4. How do you want to ensure you put these values into action—turn them into guiding principles or a family credo? What should it look like to make philanthropic decisions based on these values?

5. Are there any values on the list that should not show up in your philanthropy? Why?



IDENTIFYING YOUR AREAS OF INTEREST

Your philanthropy is most meaningful when it aligns with your values, interests, and goals. This exercise is designed to help you intentionally reflect on the causes that matter most to you, the impact you want to have, and how you want to approach giving.

If you are giving with others, take time to compare and discuss your priorities, identifying shared interests and values that will shape your philanthropic decisions.

STEP 1: Identify Your Areas of Interest

Consider the causes and issues most important to you, whether rooted in personal experiences, deeply held beliefs, or pressing challenges—and select those that align with your interests to help shape your philanthropic approach.

- | | | |
|--------------------------------------------------------|----------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Aging & the Elderly | <input type="checkbox"/> Environment | <input type="checkbox"/> Neighborhood Improvement |
| <input type="checkbox"/> Alcohol/Substance Abuse | <input type="checkbox"/> Food Security & Hunger | <input type="checkbox"/> Nonprofit Capacity Building |
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Former Foster Youth | <input type="checkbox"/> Parks & Recreation |
| <input type="checkbox"/> Arts & Culture | <input type="checkbox"/> Foster Care | <input type="checkbox"/> Persons with Disabilities |
| <input type="checkbox"/> Children & Families | <input type="checkbox"/> Health & Health Care | <input type="checkbox"/> Science & Technology |
| <input type="checkbox"/> Civic Engagement | <input type="checkbox"/> Housing & Homelessness | <input type="checkbox"/> Spirituality |
| <input type="checkbox"/> Civil/Human Rights | <input type="checkbox"/> Human Rights | <input type="checkbox"/> Violence Prevention |
| <input type="checkbox"/> Criminal Justice Reform | <input type="checkbox"/> Human Trafficking | <input type="checkbox"/> Women's Rights |
| <input type="checkbox"/> Domestic Violence | <input type="checkbox"/> Immigrant Issues | <input type="checkbox"/> Youth Development |
| <input type="checkbox"/> Early Childhood | <input type="checkbox"/> International Development | <input type="checkbox"/> Other: <input type="text"/> |
| <input type="checkbox"/> Education | <input type="checkbox"/> Legal Aid | |
| <input type="checkbox"/> Emergency/Humanitarian Relief | <input type="checkbox"/> LGBTQ Rights | |
| <input type="checkbox"/> Employment Services | <input type="checkbox"/> Literacy | |
| <input type="checkbox"/> Entrepreneurship | <input type="checkbox"/> Medical Research | |
| | <input type="checkbox"/> Mental Health | |

Your answers will help refine your philanthropic approach and ensure your giving reflects your deepest priorities.



STEP 2:
Reflect on Your Interests

Reflecting on your selected areas of interest, consider these guiding questions:

Who do you most want to help? (e.g., children in foster care, veterans, low-income families, endangered species)

Where do you want to make an impact? (e.g., your local community, a specific country, global initiatives)

What specific issues or challenges are you most passionate about? (e.g., access to arts education, climate change, mental health support)

Are there institutions or ideals you want to protect or strengthen? (e.g., independent journalism, a cultural tradition, scientific research)

Are there any populations, places, or issues you do not want your philanthropy to support?

STEP 3:
Clarify Your Philanthropic Priorities

Now that you have identified your core values, reflect on how they shape your giving priorities. Consider the following questions to refine your focus:

Which causes or issues align most closely with your values? What specific challenges or opportunities within these areas resonate with you?

What populations would you most like to support? Why do these groups matter to you?

What is the geographic focus for your giving? What communities, regions, or global areas would you like to impact?

What are the institutions, traditions, or ideals you wish to strengthen or preserve? What role do they play in advancing your vision?

What causes, organizations, or approaches would you prefer NOT to support? What influences these boundaries?



STEP 4: Refine Your Philanthropic Approach

Knowing your philanthropic style—your preferences for making a difference—gives you a clearer way to say yes or no as requests to give or get involved increase. Take time to reflect on these questions about your approach. There are no right or wrong answers, and you may skip any question that doesn't feel helpful.

Which philanthropic traditions most closely align with your motivations and priorities?

Rank the following from 1 (top) to 5 (lowest):

- Relief (*alleviate suffering*)
- Improvement (*maximize potential*)
- Social Reform (*change policy, practice, systems*)
- Civic Engagement (*build community, give voice*)
- Innovation (*support risk, discovery, experimentation*)
- I don't have a preference—I will let the nonprofit or community guide me based on the greatest need.

What type of impact do you want to have?

- Do you want to provide immediate relief (*e.g., food banks, emergency aid*)?
- Do you prefer investing in long-term change (*e.g., scholarships, research funding*)?
- Are you drawn to policy and systemic reform (*e.g., advocacy, legal action*)?
- Would you rather foster community engagement (*e.g., supporting local nonprofits, grassroots organizing*)?
- Do you want to encourage innovation (*e.g., funding experimental solutions*)?

What is your preferred giving timeline?

- Do you want to make an immediate impact?
- Would you rather spread your impact over time?
- Are you focused on building a philanthropic legacy for future generations?

How do you prefer to collaborate?

- Do you prefer to give independently?
- Would you like to partner with family or close friends?
- Do you feel more comfortable supporting established institutions?
- Are you interested in working within networks or collective funds?

How visible do you want your philanthropy to be?

- Would you like to give anonymously?
- Do you prefer private acknowledgment?
- Would you use public recognition to inspire others?

By answering these questions, you will refine your philanthropic approach, ensuring that your giving aligns with your values, goals, and desired impact.



CRAFTING YOUR CHARITABLE MISSION STATEMENT

What drives your generosity, and how do you want to make an impact? Answering these questions is the first step in creating a charitable mission statement, a simple yet powerful tool to bring clarity and purpose to your giving. A charitable mission statement is a brief expression of your giving goals, typically one to three sentences, shaped by your values, experiences, and passions. It helps clarify and focus your philanthropy, making it more intentional, fulfilling, and effective.

When crafting your mission statement, consider involving all stakeholders, including adult and young-adult family members, to ensure shared values and long-term relevance. By embracing family philanthropy and collaboratively creating a mission statement, you can produce a more meaningful and enduring declaration than one imposed by a single generation.

Self-Guided Exercise: Creating Your Charitable Mission Statement

A well-crafted charitable mission statement helps bring focus, purpose, and impact to your giving. This exercise will guide you through the process step by step. If you're giving with others, complete the first two steps individually, then discuss your answers together to develop a shared giving purpose.

STEP 1: Clarify Your Philanthropic Priorities

Reflect on Your Giving Priorities

What inspires you to give?

What causes or issues are most important to you?

How do you hope to make a difference?

Do you want to focus on a specific geographic area?

Do you prefer direct giving, collaboration, or funding innovative projects?



STEP 2: Identify Your Core Values

Think about the beliefs and experiences that shape your giving. Consider:

- Life events or people who have influenced your philanthropy
- Traditions or values that are important to you and your family
- The change you want to see in the world

STEP 3: Draft Your Mission Statement

Using your answers above, write a 1–3 sentence statement that captures the essence of your giving purpose. A strong mission statement should:

- Be **clear and concise**
- Focus on the **impact** you want to create
- Reflect your **values, interests and priorities**

STEP 4: Refine and Review

- Read your mission statement aloud—does it feel authentic?
- Ask a trusted friend or family member for feedback.
- Adjust for clarity and focus.

STEP 5: Put Your Mission into Action

Now that you have your mission statement, use it to:

- Guide your charitable giving decisions
- Stay focused when choosing causes to support
- Evaluate the long-term impact of your philanthropy

MISSION STATEMENT FORMULAS

To help you draft your mission statement, consider these common formulas:

- **Action + Target Population + Geography + Result/Goal**
(e.g., “Our giving supports mentoring of elementary school children in Fort Lauderdale so they become productive, confident adults.”)
- **Motivations + Priorities**
(e.g., “To honor our mother’s passion for art, we provide fellowships to MFA students in our region to travel abroad.”)
- **The Change We Want to See + Our Role + Our Approach**
(e.g., “Our city deserves clean rivers. We’ll advocate for clean waterways using our money, connections, and advocacy.”)
- **Values + Priorities + Giving Style**
(e.g., “We are humble servants called to support the needs of local communities in Southeast Florida by listening closely to residents and uplifting their voices.”)

By completing this exercise, you will have a clear, focused charitable mission statement that reflects your values and guides your giving.

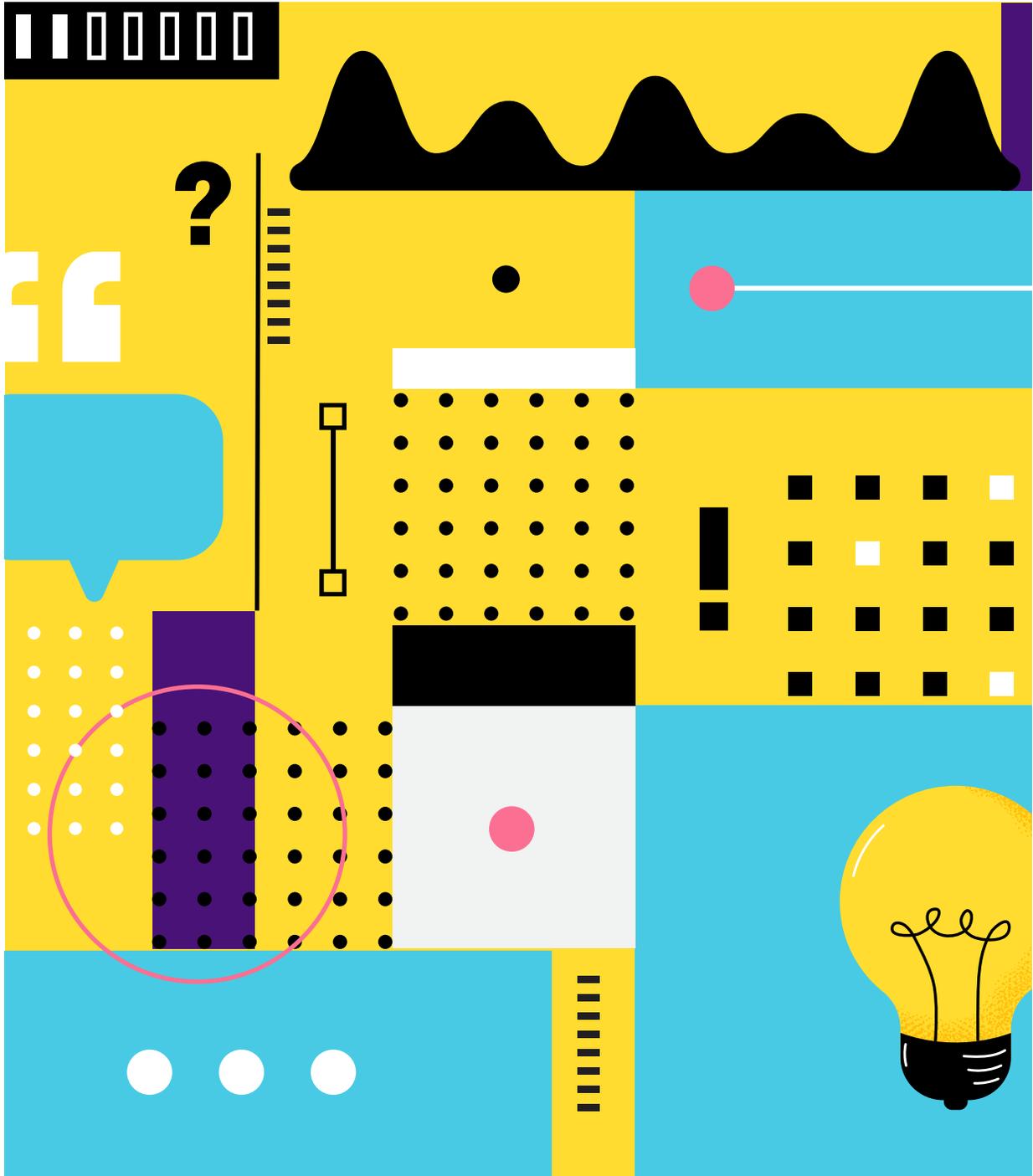
Example Mission Statements:

The Smith Family Fund is committed to preserving Florida’s wetlands for future generations by supporting education initiatives that raise awareness of these vital ecosystems. This fund is dedicated to supporting land conservation projects and advocate for policies that protect natural resources, fostering appreciation and ensuring the sustainability of wetlands for years to come.

The Johnson Family Fund empowers children, youth, and underprivileged families in Broward County through innovative programs that provide essential services such as shelter, food, education, healthcare, and opportunities for a fresh start. This fund is dedicated to improving lives by investing in initiatives that promote self-sufficiency and community well-being.



MY/OUR CHARITABLE MISSION STATEMENT:



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