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GIVING

Ten Questions Every Donor Should Ask



A PRACTICAL GUIDE FOR CLARIFYING YOUR GIVING PRIORITIES

"Generosity has many levels. We have to think generously, speak generously, and act generously. Generosity cannot come from guilt or pity. It has to come from hearts that are fearless and free and are willing to share abundantly all that is given to us."

-Henri Nouwen

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Ten Questions Every Donor Should Ask

1. What is my philosophy of giving?
2. What am I hoping to accomplish through my giving?
3. What are my giving priorities?
4. What kind of relationships do I want with the organizations I support?
5. Should I give locally or globally?
6. Should I give general or specific donations?
7. Should I support a few organizations or many?
8. How do I find nonprofits that fit my giving mission?
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INTRODUCTION

"It's no trick to make a lot of money," says the world-weary Mr. Bernstein in Orson Welles' classic *Citizen Kane*, "if what you want to do is make a lot of money." He might have said something similar about philanthropy: It's no trick to give away a lot of money . . . if what you want to do is give away a lot of money.

But giving well—there's the challenge. In this large and imperfect world, there will always be far more things to support than you have time (or money!) to support. So many organizations have a compelling need. Not even Bill Gates can simply write checks indiscriminately. (Nor is there much satisfaction in becoming a check-writing machine.) As a donor, you have to pick and choose. And to do that well, you have to be judicious.

This book and its practical tools aim to help you reflect upon your charitable giving. To help you clarify some important questions that will allow you to donate with a clear understanding of your philanthropic goals. Questions like, *What is my philosophy of giving? What does success in my giving look like? How do I discern which organizations to support?*

These questions aren't merely pragmatic. Answering them helps you give more effectively, to be sure. But it also increases the satisfaction you derive from your giving. Giving with a clear purpose and sound strategy goes a long way towards, if you will pardon our Greek, putting the *philos* (love) back into your philanthropy.

Our counsel is based upon our decades of experience working with donors on both the giving and receiving ends. We hope it gives you insight into your values and priorities when it comes to your giving and helps you experience more joy in generosity.



What is my philosophy of giving?

CLARIFYING THE BELIEFS THAT SHAPE YOUR GENEROSITY

If you think about your giving primarily in terms of *who* to give to, you need to take a step back. Before "who" comes "what" and "why"—*what* principles and beliefs inform your philanthropy, and *why* you are choosing to give. What do you think is good? Why?

You need, in other words, to consider your philosophy of giving. If you can describe the ideas behind your charitable giving—the experiences, people, books, ideas, and institutions that have shaped your giving choices—you're much closer to formulating your philanthropic goals.

Did a particular mentor change your life? What values did he or she embody? Did a book or faith tradition shape how you see human nature and what helps us flourish? What do you believe about why you should give and what that giving should (or shouldn't) look like?

There's also the question of legacy: how would you most like to be remembered? What does this reveal about the things that are truly important to you?

If all of this sounds too abstract, try this: Consider the causes or organizations you would support, and what they aim to accomplish. Then ask yourself, *So what?* and *Why do I care?* Your answer to those questions tells you a lot about what's fundamentally important to you. Keep asking until you hit bedrock—the core belief or value that makes this cause matter to you.

For example, perhaps you received a request from a local organization for a reading

program. You are intrigued by it. Follow the train of thought. You think, "I want to support this literacy program." *So what?* "Because kids who can't read are trapped in poverty." *So what?* "Because everyone deserves the opportunity to flourish and contribute." *So what?* "Because I believe human dignity requires both freedom and capability, and literacy is foundational to both."

Now you're getting somewhere. Now you're not just reacting to a compelling pitch—you're articulating a principle that can guide multiple giving decisions.

It can also be helpful to do a similar exercise with organizations you would *not* support—either because of their aims or approaches—and ask yourself what principles lead you to that rejection.

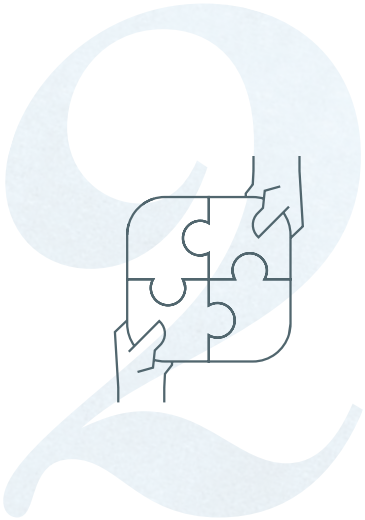
Donors differ widely in their opinions about the most pressing priorities for charitable giving. Such disagreement is a sign of health, not confusion. We *should* have different priorities—that's what makes civil society vibrant and resilient. But it's also a reminder that you need to reflect on your values and be intentional about integrating them into your giving decisions.

> **The Upshot:**
> Before deciding who to support, clarify the deeper values, core beliefs, and "why" behind your giving.

Reflections

- What experiences in your life have been most deeply formative for you?
- What do you believe about human nature and what helps us flourish?
- What detracts from flourishing?
- Why do you think giving is important?
- What ideas, people, or traditions have shaped your understanding of giving?
- What causes or activities bring you the most joy?
- How do you view the relationship between giving and your own growth?
- What would you like your giving legacy to be?
- Consider the organizations you currently support. Why do you care about them? Why support those organizations and not others? Are there common threads or patterns across the organizations?
- What causes or organizations would you *never* want to support? Why?

Drawing from your notes, try summarizing your giving philosophy—the *why* behind your generosity—in a few sentences.



What am I hoping to accomplish through my giving?

UNDERSTANDING WHAT IMPACT MEANS TO YOU

You want your giving to be successful, but what does that mean?

It can be tempting to look for immediate, "solvable" problems. Some goals are indeed straightforward and quantitative: you care about access to intramural sports so you help build a new basketball court at the local high school. The neighborhood's environment matters to you, so you help the local gardening club plant flowers at the park. These are "wins" that have visible proof of progress.

However, much of the most important work in the world is qualitative and persistent. Restoring hope to the discouraged, evangelizing souls, or supporting medical research for chronic illnesses are not tasks that can be totally "finished" in a giving cycle or a lifetime. Some problems will exist as long as humanity exists. We are fallen creatures.

Giving well requires self-reflection on one's own expectations about what you're striving toward and what "good" looks like in light of those goals. The chart on the following pages note many of the most common intentions for giving.

Much of modern philanthropy aims to improve humanity with an intense focus on metrics. In recent years, much ink has been spilled on "effective altruism," the approach to giving in which prospective donors strive to quantify exactly how much "bang" they get for their charitable buck, and then make giving decisions accordingly. So if organization X cures twelve children of blindness at the same cost as organization Y helps one child into college, you have a moral imperative to give to Org X because the total sum of human misery alleviated is higher.

While impact is important, it has to be considered in light of the intention behind it. We believe that effective altruism's cold calculations and emphasis on "return on investment" not only tilt the balance too heavily toward impact that's easily measured; they also distort the true nature of charitable giving: **relational, not transactional.** It reduces to statistics things that are deeply personal and individual. After all, it's in the context of deep relationship and trust that the most profound change happens—and the workings of the human heart cannot be easily measured.

A final, and important note: Impact is not just about the difference you accomplish in the world; it is also about the change within yourself.

Recall our question in the previous section about the way you think of your own identity: perhaps you see yourself as a faithful Christian, a conservationist, or the beneficiary of a life-changing scholarship. When you take a step back to consider the good you want to bring to your neighborhood, city, country, or the world, you are further developing your own virtue. Your giving comes from your past experience and present concerns, but it also shapes your future purpose and your legacy after this life.

Do you want to be a giver who inspires beauty? One who brings immediate relief to those in crisis? One who innovates boldly? One who raises awareness for the forgotten?

How will your giving impact *you?*

> **The Upshot:**
> Reflecting on the intentions behind your giving helps clarify your priorities and what success looks like.

The Thirteen Intentions of Philanthropy

Category	Intention	What It Is	What Success Looks Like
Communitarian *"We want to..."*	**Strengthen community**	Giving to deepen belonging, solidarity, and to identity, religion, geography, shared experience.	Depth and continuity of relationships; intergenerational strength; mutual support, resiliency, and advocacy; cohesion, connection, and belonging, even in the absence of geographic reach or scale.
	Give back or memorialize	Giving motivated by gratitude, legacy, memory, or personal resonance, to ensure that something (a project, event, place, principle, or organization) endures into the future.	Continued vitality and strength of an organization, institution, or project; continuity of memory and/or of narratives across generations; increased capacity to make progress on an issue of deep personal resonance.
	Build and sustain the commons	Giving to create and preserve shared infrastructure, be it physical (public spaces, institutions, cultural assets) or relational (trust, norms, dialogue). The focus is stewarding shared assets (material, cultural, and civic) to help people live, grow, and thrive together.	Durability and accessibility of shared institutions and spaces; sustained quality and relevance of those assets; increased social cohesion, including stronger civic bonds, trust, and dialogue across differences; sense of belonging and ownership across groups.
	Share joy and celebration	Giving to foster delight, beauty, pride, and celebration; less motivated by crisis or justice concerns than by an impulse to live life with joy (even in moments of hardship).	Collective joy and pride; increased quality of life and measures of happiness; strengthened community bonds.
Transformative *"We hope to..."*	**Accelerate breakthroughs**	Giving to spark leaps forward (scientific, cultural, economic), solve well-defined technical challenges, or open new frontiers of discovery.	Achieving or progressing toward a breakthrough; generating new discoveries, approaches, and treatments. When achieved, breakthroughs often hand-off to others to broadly scale and share the benefits.

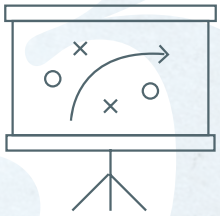
Excerpted from Ariel Simon's article, "What Else Can We Do? The Thirteen Intentions of Philanthropy," which appeared in the Spring 2026 issue of the *Stanford Social Innovation Review*. Full article available at https://ssir.org/articles/entry/thirteen-intentions-of-philanthropy.

Category	Intention	What It Is	What Success Looks Like
Transformative Continued *"We hope to..."*	**Tackle a major problem**	Giving to help address significant, often systemic issues of broad concern and impact (regional, national, or global). This is where "traditional" large foundations often focus, and where the government hand-off theory of change factors most frequently.	Scaled impact (often quantifiable) on target issues (e.g., lives saved, emissions reductions); system and policy changes that support the durability of those gains.
	Advance flourishing	Giving to benefit society as a whole by fueling inquiry, discovery, and creativity in the sciences, arts, culture, and/or other humanistic endeavors. More focused on ongoing ferment and activity than on quantitative outcomes.	Vibrant culture of scientific, cultural, and artistic production; new insights that expand our understanding of the world and ourselves; contributions that enrich lives, generate awe, tell new stories, and open eyes.
Declarative *"We feel compelled to..."*	**Elevate values**	Giving to elevate specific cultural, moral, or professional principles, values, norms, and messages, frequently by celebrating excellence, identifying exemplars or role models, and telling stories.	Shifting cultural awareness, public understanding, and standards of excellence; (re)defining what "good" looks like; creating and broadly sharing narratives that inspire admiration, emulation, and potentially even action and behavior change ("narrative change").
	Build power	Giving to shift who has voice, agency, and influence over critical decisions and resources (often with communities historically excluded from power in mind).	Shifts in policy and resource allocation; increased autonomy and civic/political strength; growth of participatory processes; greater representation and voice; resiliency of movements.
	Take a stand	Giving that expresses and reflects moral convictions, even when systemic "success" may be uncertain or unlikely, and conveys solidarity, conscience, and presence.	Elevated visibility for neglected or oppressed voices and causes; creating common knowledge and social pressure that yields cultural and political change; encouraging others to bear witness.

Category	Intention	What It Is	What Success Looks Like
Humanitarian *"We're called to..."*	**Respond to a crisis**	Giving to provide immediate relief and/or support long-term recovery during and after natural disasters, wars, pandemics, and other catastrophes.	Speed and efficacy in addressing urgent needs and filling gaps in government capacity; recovery over time; increased resiliency in impacted communities and adaptive capacity to address future crises.
	Offer a helping hand	Giving as an expression of shared humanity, love, and empathy, often when suffering is present. Quintessential "charity," driven by multiple impulses (human, religious, ethical).	Alleviating suffering; supporting dignity and self-sufficiency; avoiding "hardening one's heart" or sitting in judgment; strengthening bonds in a community; affirming common humanity.
	Promote potential	Giving to support individual development and possibility, investing to help students, artists, leaders, thinkers, and changemakers expand their horizons, sustain their practice, amplify their reach, or otherwise fulfill their potential.	Changes to life trajectory; individual transformation; sustained or even amplified reach and creative/intellectual output; capability development; access to networks, experiences, and resources that unlock new opportunities.

Reflections

- What does “giving well” mean to you?
- When you imagine your giving being successful, what is the first image that comes to mind?
- What motivates your giving the most? Does it fit into one or more of the “intention” categories listed?
- How do you define "fruitfulness" in work that may never be "finished" in a single lifetime?
- What are some signs of progress along the way?
- If your giving were a mirror, what virtues (e.g., patience, boldness, mercy, or creativity) would you want it to reflect to you?
- What is the “purpose” you see for yourself that you hope your giving will carry forward?



What are my giving priorities?

FOCUSING YOUR RESOURCES ON WHAT MATTERS MOST

The charitable landscape is vast, varied, and—let's be honest—overwhelming. Poverty, education, religious freedom, the arts, veterans' services, international aid. The list goes on. **Here's the uncomfortable truth: you cannot fund them all. Not even close.** And the moment you try to be all things to all causes, you risk becoming nothing to any of them.

So how do you choose? **Here's our advice: Start with your identity, not with need.** Usually, our giving priorities reflect core components of who we are. Think back to the two sections and what you said mattered the most to you.

Maybe you think of yourself as a Christian, a localist, and a beneficiary of a liberal arts education. What, then, are some giving areas that reflect your core values? This line of thinking might lead you to prioritize small charities you can see and interact with over a global anti-hunger organization; or steer your giving towards Christian organizations that advance education rather than ones that focus on, say, marriage ministry.

Or perhaps you're a former teacher who grew up in poverty and now runs a successful business. Your priorities might naturally gravitate toward educational opportunity, economic mobility, and entrepreneurship—causes that reflect your lived experience and hard-won wisdom.

Challenge yourself to identify your top giving priorities, the areas where your values, your experience, your resources, your interests, and genuine need intersect. The causes that truly reflect who you are and what you believe about human flourishing.

As you consider, beware the tyranny of the urgent. The most compelling needs are not always the most important ones, and the loudest voices are not always the wisest.

A natural disaster will always generate more emotional urgency than the slow, patient work of character and habit formation. A viral social media campaign will always seem more pressing than the quiet strengthening of local institutions.

But if you let urgency dictate your priorities, you'll never invest in the long-term, foundational relationships that actually influence behavior and communities.

Take some time to write down your giving priorities. Then, pick out your top three.

While you needn't focus your giving *exclusively* on those top areas (in fact, we recommend leaving some room for new opportunities as they come along), knowing what you value most will help you clarify and recognize your personal giving mission, your unique charitable calling.

It will help you prioritize the requests you receive, to seek out and say *yes* to opportunities that are aligned with your giving mission. Those causes need *you*—not just your money, but your sustained attention, your experience, your deepening relationships, your patient capital over years and decades.

That's where transformation happens. That's where you move from being a donor to being a partner. That's where giving becomes not just a resource for others, but something that changes you.

Clarity about your giving priorities will also help you say *no* to the things that aren't on your list. Saying no isn't selfishness. It's stewardship of your time, your energy, and your resources so you can give your focus and deep attention to the things that matter most to you.

> **The Upshot:**
> Pick your top giving priorities based on your identity, a few areas where personal conviction and genuine need intersect. Using those priorities to guide decisions helps you focus on causes truly aligned with your personal giving mission.

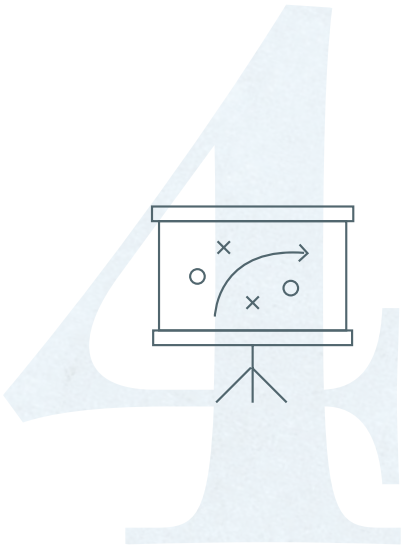
Reflections

- Looking back at the previous sections, how might your giving philosophy inform your giving choices?
- What giving brings you the most joy?
- What causes keep you up at night or engage you in a special way?
- What problems in your community or the broader world do you see as most pressing?
- Is your current giving in line with your priorities and passions? If not, what changes would you make?
- Make a list of all the things you would be excited to support. Try ranking them.
- Make a list of the things you know you do *not* want to support.

Example Categories

- Addiction treatment and prevention
- Adoption and foster care
- Arts and culture
- Civil society
- Community engagement
- Education
- Elder care
- Environment, nature
- Life issues
- History
- Healthcare
- Homelessness
- Humanitarian aid and development
- Marriage
- Media and publishing
- Military, veterans
- Mental health
- Religion
- Public policy
- Sports and recreation
- Youth outreach and engagement

Drawing from your notes, narrow down your list to no more than three causes that are *most* important to you. If you could only support three for the rest of your life, what would they be? Add a brief note about the "why" for each.



What kind of relationships do I want with the organizations I support?

ALIGNING YOUR EXPECTATIONS WITH NONPROFIT REALITIES

If charitable giving is relational, not transactional, what are you hoping to get out of it?

Do you want to give of your time and talent as well as your treasure? Do you prefer things up-close-and-personal or more distant? Does the idea of seeing someone frequently in the course of your daily life excite you or terrify you? Do you prefer highly professional communications and experiences or are you OK with some messiness?

How you answer these questions may have a big impact on where, how, and who you choose to support. If you want to be able to see the recipients of your charity regularly and see impact first-hand, for example, it's a whole lot easier to do that if you give to organizations in close geographic proximity.

An organization's size and organizational infrastructure may also be a selection factor for you. Your gifts could have an outsized impact at small organizations, but they may not have strong development or communications programs to acknowledge your gifts and stay in touch regularly. Would that drive you nuts?

Once you have a relationship with a nonprofit, how do you make sure it's a healthy one?

This much is certain: If you wish to, you have the right to be involved in the life of the grantee. You should feel free to ask them how things are going. By all means, go and see their work in action!

What you shouldn't do, if you want a healthy relationship, is swaddle your grantees in red tape. After all—do you want the charitable organization to be out there pursuing its

mission, or do you want it to be filling out reports for you? It's not an either/or—many organizations can do both well—but it's good to be aware that the requests we make as donors take time and effort to manage.

You have to align your expectations with what your charities can deliver. And first and foremost, you need to remember that nonprofits are different than businesses. The basic premise of nonprofits is that there are things that are worth doing that aren't lucrative, and those things are called the charitable sector. As such, donors need to calibrate their expectations concerning "return on investment" to what charities can reasonably deliver. If you're trying to overlay a business model onto nonprofits, you are always going to be disappointed. It's often better to think in terms of "return on relationship" when it comes to the causes you support.

So what should you demand—and what can be measured? In pondering this question, it's useful to distinguish between inputs and outputs. If you're funding a lecture program, for instance, it's not hard to measure inputs: the number of lectures, people in attendance at each, etc. Outputs, though, are tricky. Maybe you want to change people's views on incarceration, or inspire people to be more entrepreneurial, or strengthen the intellectual life of your community. But how will you measure that? And some outputs—addressing intergenerational poverty, for example—might take decades to come to fruition.

Ask yourself: Am I the type of donor that needs to measure outputs . . . or am I satisfied knowing the inputs? Because you have every right to demand information on the inputs! If you made a gift to fund ten scholarships, the charity ought to show you the ten students now in college. Not only is that information you ought to receive, such measurements of input serve to bring you closer to the people you're helping.

If you're driven to know outputs, that may mean prioritizing some types of charities over others, likely ones with well-developed infrastructure, shorter-term priorities, concrete deliverables, and clear evidence of success.

In other words: know thyself, and guide your giving accordingly.

> **The Upshot:**
> Think of your charitable giving as a relationship and choose nonprofits that match the level of involvement, proximity, communication, and accountability you want—while keeping expectations realistic about what nonprofits can measure and deliver.

Reflections

- Do you want to be a hands-on partner or a more distant supporter?
- What do you find fulfilling in your relationships with the organizations you support?
- What drives you nuts?
- What kind of relationship do you **not** want? Are there things you need to change to avoid these challenges?
- How many close relationships with nonprofits can you realistically maintain given your time and energy?

- What are your expectations for the nonprofits you support? Do you think they're realistic?
- How important is personal connection versus organizational effectiveness in your giving decisions?
- Are your grantees' organizational resources aligned with your expectations for communications, reporting, and the like? If not, how can you help them get there?



Should I give locally or globally?

MAKING A DIFFERENCE WHERE IT MATTERS TO YOU

So you have an idea of what you might want to fund and why. There remain questions as to *where* you should focus your giving.

These are questions of relationship and location, but they are also questions of *scale*. There are advantages and challenges associated both with problem solving globally and in your own backyard.

On one hand, your gift *can* go much further when you're giving globally: funding a well for safe drinking water in a sub-Saharan village doesn't cost much and will materially improve people's lives in a way that you could never match with a similarly sized gift in Dayton, Ohio.

Conversely, you know your own backyard—and the problems it faces—*far better* than you know that sub-Saharan village. And isn't well-informed giving more likely to be successful?

Giving locally and person-to-person offers the immediate advantage of accountability, as there's natural transparency when things are close. You're around to see the impact —for good or ill—of your giving so you can learn from your experience and grow over time. Systemic and global giving tends to require layers of bureaucracy and regulation—and all the inefficiencies attendant on such self-sustaining structures.

We believe that the people closest to the problems are best suited to addressing them. So when it comes to evaluating potential partner organizations, we look for deep roots in a community, local staff who know and are trusted by those they serve, and the ability and authority to make operational decisions quickly at a local level.

American civil society is born of the idea that people can solve problems cooperatively *without* expansive bureaucratic oversight. This voluntary association is one of the things that makes America truly exceptional. The bigger and more distant philanthropy gets, the more it resembles government intervening in the lives of its subjects.

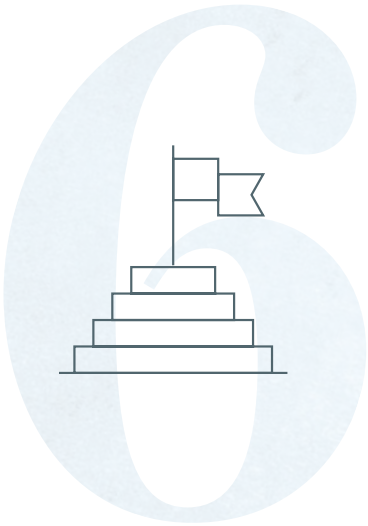
As you consider these tradeoffs, a final caution to consider: How sure are you of the reach of your own wisdom? For all of global philanthropy's laudable intentions, we must note the increased potential for error or arrogance (or both) in the person who, from altitudes of 30,000 feet, claims to know what will really help societies on the other side of the globe.

Maybe there's wisdom in sticking to the suffering in one's own backyard.

> **The Upshot:**
> Deciding *where* to direct your giving depends on how much you value accountability and relationship.

Reflections

- Where do you feel called and best-equipped to give given your life experience?
- How do you define “local”—your neighborhood, city, region, or state?
- Is there a specific proportion of your giving you want to direct locally versus regionally, nationally, or internationally?
- What are some problems that you know well and are in a position to help with your time, talent, and treasure?
- How does proximity to your giving (or lack thereof) affect your ability to assess impact and build relationships? Are you OK with that?



Should I give general or specific donations?

GIVING TO STRENGTHEN AND GIVING TO BUILD

Is it better to make donations that are clearly limited to a specific item or project, rather than general operations? This question boils down to how well you trust the judgment of an organization and its leaders to use your gift wisely.

Historically, donors have shied away from unrestricted gifts. They don't want their money to disappear into the general pot or be frittered away. The problem with this understandable reluctance is that *every* organization needs resources for operations to pursue its mission well. They have to keep the lights on somehow. "Money for fundraising or rent" might not have the direct appeal of "money for starving children," but the organization has to remain solvent to pursue its mission. And truthfully, an investment in an organization's fundraising is one of the best ways to help an organization help itself. If a particular project speaks to your mission and interest, then by all means fund it. This tends to work better with larger, more established organizations than with smaller ones.

We suggest that, instead of micromanaging how your gift is spent, judge nonprofits based on how effectively they pursue their mission. If they seem to work effectively, if they're doing what they said they would do, and you are on board with the mission of the organization, our advice is this: start small, write the check, get out of the way in terms of how exactly it's spent, and stay in touch to see what they accomplish. If they're prudent and successful, grow your giving over time. There are exceptions to this rule, of course (gifts to big universities, for example), but when in doubt, we'd say start small and unrestricted and see what they do with their freedom.

> **The Upshot:**
> Give with trust rather than micromanagement. Start small, get to know the leadership, and see what they choose to prioritize.

Reflections

- Have you ever hesitated to give because you were concerned about overhead or administrative costs? What beliefs were behind that hesitation?
- What is the difference between funding a specific project and strengthening an organization's overall capacity? Which feels more compelling to you, and why?
- How might getting to know an organization's leadership change the way you think about trust, control, and generosity?



Should I support few organizations or many?

CONCENTRATED VS. DIVERSIFIED GIVING

Is it better to make ten $1,000 donations to different organizations or a single $10,000 gift? Questions of number versus size are ones just about every donor must address when considering how to give well.

How you approach this issue will depend in part on where you stand on the impact question. If you want your philanthropy to make a tangible difference to some concrete issue, it probably makes sense to make a limited number of investments in areas that support maximum strategic impact. If your charitable giving is an expression of love, solidarity, relationship, or concern for your fellow man, you might be more inclined to spread the love around. For many, it's a mix.

Relatedly, you should consider what's most important to you in your giving. Are you motivated in part by a desire for recognition or relationships? No one gets his or her name on a building by making thousands of small gifts.

And are you satisfied with knowing inputs, or do you need to see some outputs? If seeing a measurable impact matters a lot to you, it makes sense to target your charitable dollars very selectively.

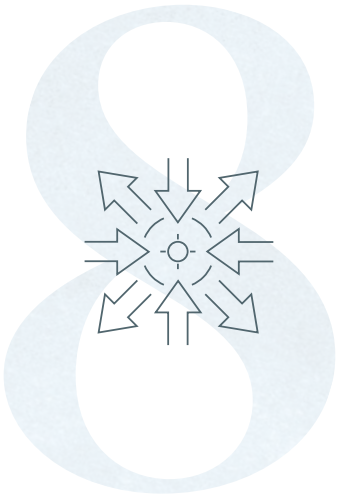
Finally, it makes sense to think about gift size in relation to the size and capacity of the institution. A $1,000 gift to a large organization may not go very far, whereas it can be very consequential and meaningful for a smaller one. On the other side of the coin, a large gift may help a strong organization build on its strengths but overwhelm a smaller one, especially if it's for something outside its core wheelhouse.

What you want to avoid is incoherence. Don't spread your gifts around and then demand a clear output or detailed reporting when your gift isn't big enough to warrant it. Don't treat charity like a business incubator and then wonder why the human connection is missing. Identify where you stand and allocate your dollars accordingly.

> **The Upshot:**
> Decide whether to give broadly or concentrate your giving based on your goals for relationship and desired impact, keeping in mind your intentions for giving and what "success" in that might look like. Be on the lookout for inconsistency between what you're aiming to achieve and how you allocate your gifts.

Reflections

- Looking back at your giving over the past few years, have you tended to support a few organizations deeply or many organizations broadly? Why?
- Based on your reflections on the previous questions, do the organizations you support reflect your priorities and principles in an intentional way, or have they become scattered and reactive?
- Over time, are you interested in going more “narrow and deep” on particular issues, or spreading your giving across a greater number of recipients? Perhaps somewhere in between?
- If you had to design a more intentional giving portfolio for the next year, what would you concentrate, continue, or reduce?



How do I find nonprofits that fit my giving mission?

NAVIGATING UNCERTAIN WATERS

Once you've identified your philanthropic priorities, the next step is how to put them into practice—that is, to whom you should give. **How do you decide which charities are right for you?** Finding nonprofits that share your values is not simply a matter of locating organizations that work on the issues you care about. It is also a process of discerning trust, affinity, and relationship. Here are a few places to start:

1. **Referrals:** Start your search with people whose judgment you trust. Ask friends, colleagues, advisors, or nonprofit leaders you currently support about who they've come across doing good work in the area you care about.

2. **Get to know the field:** Reading articles, studies, and other content material related to the causes you have prioritized can also be helpful. You'll educate yourself about the issues at play, and you may come across organizations, scholars, and nonprofit leaders whose work you can look into further.

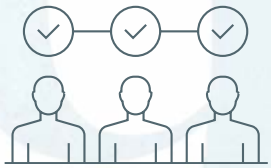
3. **Research:** Once you've found some possible fits, do some digging. Look up their website, check out materials, read annual reports or financials if available. Look for signs that their mission and priorities align with your giving focus.

4. **Meet the leadership:** Whenever possible, get involved. Get to know the leadership at organizations that pique your interest. Visit the office. Attend an event. Listen to how they talk about their mission, the people they serve, and the communities they accompany. Ask yourself whether their story resonates with yours. If it does, take that leap of faith and make a gift. If you're uncertain, you can always start small.

> **The Upshot:**
> Start with trusted recommendations, research, and getting to know nonprofit leaders personally. Still overwhelmed? We can help.

Reflections

- Who in your life shares your concerns or values, and what organizations have they come to trust?
- List out 3-4 organizations you either support now or may be interested in. What drew you to each organization? Was it a person? Was it the mission? How do they communicate with their supporters? Does the relationship feel like something you would like to deepen over time?



Who should I involve in my giving?

INVITING FAMILY, ADVISORS, OR STAFF INTO YOUR DISCERNMENT PROCESS

It can be wise to invite others into your discernment process, but it's extremely important to be selective about who you involve. You should know why you are involving them and identify what role each will play. Family members, trusted advisors, staff, or friends can help you see blind spots, identify strong organizations to consider, reduce administrative burdens, and clarify the values underneath your decisions. But their involvement should further your purpose, not undermine it.

A helpful starting point is to ask: Whose money do I understand this to be? Many donors see themselves as stewards of resources that belong to God. Others see the funds as their personal responsibility, a legacy from someone else whose memory they want to honor, or the family's shared inheritance they are stewarding. Your answer will shape how much control you feel over the giving, how much input you want from others, and how you might handle disagreement. If you see the money as entrusted to you, you may feel a strong obligation to make final decisions according to your conscience and values. If you see it as family money or another's legacy, you may want a more collaborative process. Clarity here matters.

Next: How do you make giving decisions? If you make giving decisions with family members or others, you may want to have each of them go through the same process of discerning their giving philosophy and priorities that you have. If there are differences, who makes the final decision? Do you want to prioritize the "overlap" in giving interests, or can you agree to disagree? Having those discussions early on and setting some ground rules can help reduce conflict and build trust and relationship.

Advisors and staff can also play an important role in your giving by helping source aligned grantees, conducting due diligence, managing communication, and reducing administrative demands so that you can focus on relationships. But these advisors, however skilled, are only as good as their commitment to your principles and their ability to steward your intent. That comes first.

The goal is not to include everyone equally; it is to involve the right people in the right ways so that your giving remains faithful to its purpose.

> **The Upshot:**
> Donors should involve others in their giving carefully and intentionally, clarifying whose money is being stewarded, who should have input, and how advisors or family members can support rather than distort the donor's mission.

Reflections

- Whose money do you understand this to be, and are there obligations you associate with it?
- How does your answer to that question shape the level of control or responsibility you feel over your giving decisions?
- Who in your family or circle of trust might bring wisdom to your giving process? Are the people you may have involved in your giving aligned with your core values?
- How and when will you make your charitable giving decisions? If there is disagreement, who has final decision-making authority, and why?



How do I communicate and protect my mission as a donor?

STAYING TRUE TO YOUR GIVING INTENTIONS

On a long enough timeline, everything goes awry. Nations crumble, engines rust, entropy reigns supreme. Your philanthropic intent is no exception. The longer the timeline built into your giving plan, the more likely things are to drift off course. Many foundations are established in perpetuity and today fund causes that would make their founders roll over in their graves.

Hence the importance of protecting donor intent. And the first step in preserving donor intent is defining your mission—spelling out exactly what principles underpin your giving and what you aim to accomplish. The more clearly you define your philanthropic mission, the more faithfully others can preserve and execute your intentions when you are gone. This kind of statement takes your philosophy of giving and the goals and objectives explored in previous sections and creates a practical guide that can be shared with others: family, staff, fund requestors, future generations.

You want to be clear on principles, but flexible on execution so you don't inadvertently make your intent impossible to accomplish or so narrow it becomes obsolete.

This task isn't easy and takes time and trial and error to get right, but it's essential. What may seem obvious to you may not be obvious to others. Define ambiguous terms. Explain how you see the connections between your principles. Always try to put yourself in the position of a reader who has never met you. Would this person understand what you were hoping to accomplish? Would he or she have a clear picture of what motivated you? Would he or she have a good sense of the kinds of things you would want to support?

A second task is choosing a giving timeline and a vehicle (or vehicles) to match it—a charitable foundation, trust, donor-advised fund, etc.—and giving thought to what protections may need to be established to help secure your intent over time, such as setting up strong bylaws and governance guidelines and involving trusted advisors.

The default for many givers is to set up giving vehicles in perpetuity. But as one wise friend of ours frequently reminds us, **forever is a long time**. We have no clear idea of what problems will face the world of tomorrow—nor of how future generations will respond to them. Even with a clear mission, there's little certainty concerning how your money will be spent "in perpetuity."

As an alternative, many advocate "giving while living" as a way to retain oversight over how your money is spent and enjoy the impact of your generosity while you're around to appreciate it. Others choose to "sunset" their giving along a defined timeline, such as 20 years after their passing. Give thought to this question while you can so others don't make it for you!

Finally, think about who needs to know about your giving intentions so they are aware and can help steward your wishes when the time comes. Communicating with family members, legal and financial advisors, grantees, estate beneficiaries, and trusted friends about your wishes now can help give them clarity and confidence in their stewardship down the road.

> **The Upshot:**
> Donor intent tends to drift over time. To help keep it on course, don't wait to think about until it's too late: clearly define your giving mission and share it, define a timeline for your giving, and choose a giving vehicle aligned with your intent.

Reflections

- Do you want to give while you live, or extend your giving after you are gone? If so, for how many years? In perpetuity?
- If you do want to give beyond your lifespan, what giving vehicle will you choose to support your intent (e.g., a private foundation, donor-advised fund, etc.)?
- If your giving will outlast you, who will you involve in giving decisions? How will future ones be chosen?

Giving Mission

Drawing on your previous notes, challenge yourself to summarize your giving mission on this page.

- *Your Why:* Based on your philosophy of giving, describe in a few sentences why you are giving, the convictions and motivations shaping your philanthropy, and what you are aiming to accomplish.
- *Your Focus Areas:* List out the specific areas/causes/populations you plan to focus on with your giving.

Giving Plan

Clarify any additional practical aspects that will help guide you as you put your giving mission into practice.

Desired Giving Total This Year: _____

Priority Giving Areas	Proportion of Giving
	%
	%
	%
	%
	%

Giving Strategy

☐ Highly focused, proactive ☐ Responsive to needs ☐ A mix

Giving Methods

Check all that apply

☐ Donor-advised fund ☐ Private foundation ☐ Direct/personal gift

☐ Assets (i.e. stock) ☐ Trust ☐ Corporate donation ☐ Matched gifts

Gift Types

Check all that apply

☐ Operations ☐ Project-specific gifts ☐ Endowments ☐ Estate/Bequest

☐ Capital/infrastructure ☐ Capacity-building ☐ Other: _____

Mission Types

Check all that apply

☐ Direct service ☐ Public policy ☐ Research/scholarship ☐ Training/education

☐ Civic engagement ☐ Broad public engagement ☐ Other: _____

Impact

Check all that apply

☐ Near-term impact ☐ Medium-term impact ☐ Long-term impact

☐ Concrete, measurable ☐ I'm comfortable with ambiguity

☐ Qualitative ☐ Other: _____

Giving Impact Priorities

What "success" looks like for your giving

_____

_____

_____

Geographic Focus

Check all that apply

☐ In my town ☐ In broader local region ☐ In state ☐ In country

☐ International ☐ Other: _____

Geography Detail: _____

Organizational Development Stage

Check all that apply

☐ Start-Up ☐ Small (Budget <$1M) ☐ Medium (Budget $1M-$10M)

☐ Large (Budget >$10M) ☐ Other: _____

Concentration

☐ Fewer, larger gifts ☐ Smaller gifts to more organizations ☐ A mix

Number of Organizations Supported

☐ 1-5 orgs ☐ 6-10 orgs ☐ 11-20 orgs ☐ 20+

Personal Engagement Priorities

Check all that apply

☐ Events ☐ Emails/calls/mailings ☐ In-person meetings

☐ Volunteer service ☐ Site visits ☐ Board service ☐ Hands-off

Giving Decision-Makers	Role

Decision-Making Cadence

☐ Review requests 1x/year ☐ 2x/year ☐ Quarterly ☐ Monthly

☐ As received ☐ Other: _____

Cadence Detail: _____

Decision-Making Method

☐ Others advise, I decide ☐ Equal votes, majority decides ☐ Any no is a veto

☐ Other: _____

Giving Timeframe

Check all that apply

☐ Give while living ☐ One-time estate gifts ☐ Perpetual giving vehicle

☐ Sunset ___ years after death ☐ Other: _____

Donor Intent Protections

Check all that apply

☐ Give while living ☐ Trusted staff ☐ Trusted board and/or advisors

☐ Aligned giving vehicle ☐ Other: _____

Who Needs to Know About My Giving Intent?

To-Do List

Action items needed to implement my giving mission

AmPhil GIVING

Your Partner in Principled, Intentional Giving

WHAT WE DO

AmPhil Giving's seasoned consultants partner with donors in two ways:

DONOR ADVISORY SUPPORT

Get strategic guidance and hands-on support to clarify giving plans and help you give in line with your principles and priorities.

GRANTEE CAPACITY BUILDING

Invest in the effectiveness and sustainability of your grantees through expert advice, training, and execution support in areas like strategy, fundraising, and operations.

SELECT SERVICES

- Giving strategy development
- Grantee sourcing & due diligence
- Gift analysis & reporting
- Donor intent audits
- Grantee relationship management
- Intent statements, annual reports, memoirs
- Database implementation & support
- Fundraising trainings and accountability

GIVING PHILOSOPHY

PEOPLE OVER POLICY

Who you choose to involve in your giving will shape your philanthropic legacy more than legal documents.

THE HEART MATTERS

Effective giving is inspired by love and grounded in your experience, principles, and relationships.

RELATIONSHIPS OVER FORMS

Simple, personal approaches work better than bureaucratic barriers that create distance and burden.

CHARITY BEGINS AT HOME

Those closest to problems are best suited to solve them; supporting local institutions can be uniquely rewarding.

DATA IS A TOOL, NOT A STRATEGY

Numbers require interpretation guided by principles, context, and practical wisdom.

WISE GIVING IS ROOTED IN FREEDOM

Lasting change requires individual, voluntary motivation and action—top-down mandates don't achieve that.

AmPhil
GIVING

Have questions? We'd love to hear from you!



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"Generosity has many levels. We have to think generously, speak generously, and act generously. Generosity cannot come from guilt or pity. It has to come from hearts that are fearless and free and are willing to share abundantly all that is given to us."

-Henri Nouwen

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