



# You, the Philanthropist

*My heart is moved by all I cannot save:*

*So much has been destroyed.*

*I have to cast my lot with those who age after  
age, perversely, with no extraordinary power,*

*Reconstitute the world.*

-Adrienne Rich



# Philanthropy

- ➔ The word *philanthropy*, derived from the Greek, literally means “love of humankind.”
  - Another way is giving time, talent, or treasure for the public good.
- ➔ *Inspired Philanthropy* defines as philanthropists people who exert themselves for the well-being of others, who engage in practical and heartfelt benevolence, and who donate money and time to causes they believe in so that the world may become a better place.



# Gratitude

- ➔ Many of us give because we feel grateful for something or to someone.
- ➔ Remember to “pay it forward” to someone else

## Exercise 2.1

### Stereotypes

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10–20 minutes

Fill in the following sentences, allowing yourself to write whatever comes to your mind, uncensored. By getting at the ideas that are just below the surface we can begin to identify our stereotypes and, if appropriate, discard them.

Typical philanthropists are:

(example: from old money; older than fifty-five; live in mansions, give millions)

- a.
- b.
- c.

People I know who give are:

- a.
- b.
- c.

As a giver I am

(example: generous, focused, scattered, impulsive):

- a.
- b.
- c.

Reflection: What have you learned about yourself by doing this exercise? For example, you may have found that your stereotypes contradict your experience or that the terms philanthropist and giver elicit different reactions.

## Exercise 2.2

### Gratitude

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15 minutes

What have you received, and how might you pay it forward?

#### A. The Greatest Gift You Have Received

Who has most deeply touched your life, or the life of your family, as a giver?

What did this mentor, hero, or heroine pass on to you that you most treasure?

What are you most grateful for?

#### B. What Have You Given

There are many ways to pay forward the gifts you have received by passing on your own gifts of yourself to others. Rate yourself below using a scale of 0 to 5, with 0 meaning you have no interest in that activity, 1 meaning you are not doing enough, and 5 meaning you are very active in the spirit of giving.

\_\_\_ Parenting

\_\_\_ Teaching

\_\_\_ Coaching

\_\_\_ Mentoring

\_\_\_ Volunteering

\_\_\_ Government service

\_\_\_ Military service

\_\_\_ Service through religious  
organizations

\_\_\_ Committee work for a nonprofit

\_\_\_ Service on nonprofit board

\_\_\_ Artistic accomplishment

\_\_\_ Spiritual assistance (meditation, prayer,  
observances)

\_\_\_ Giving financially while living

\_\_\_ Legacy gifts

\_\_\_ Other \_\_\_\_\_

\_\_\_ Other \_\_\_\_\_

**Exercise 2.2**  
**Gratitude, Continued**

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Looking at the ratings above, in what areas are you active and satisfied with your action?

What areas would you like to become more active in?

**C. Giving While Living: What Do You Want to Do Now?**

In the next three months I will extend my gifts to others in these ways:

**D. Leaving a Legacy**

The one thing I want people to remember about me as a giver is:

After I am gone, my hope is that my gifts continue in these ways:



# What Do You Care About?

- ➔ Begin with who you are and what is at your core.
- ➔ Knowing the sources of the inspiration of your giving will enable you to ground your giving and help you shape your choices.
- ➔ Give from your own most deeply held values and concerns



# Values Drive Decisions

- ➔ A giving plan is not only a way to express your values, it also helps articulate what those values are.
- ➔ Our values greatly influence our behavior as givers, including what we fund, how we evaluate projects, and how we relate to those we support.





# What Do You Bring With You?

- ⇒ Many donors also volunteer
- ⇒ Experienced donors report that one of the benefits of their work has been developing and sharing a wide variety of skills.
- ⇒ Putting what you do well in the service of a cause you feel passionate about and being recognized for your contribution feels wonderful.

## Exercise 2.3

### Vision and Values

15–20 minutes

Put a check mark beside the values below that resonate for you. Then circle the *three* that are most important to you.

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Community     | <input type="checkbox"/> Harmony         | <input type="checkbox"/> Preservation    |
| <input type="checkbox"/> Compassion    | <input type="checkbox"/> Healing         | <input type="checkbox"/> Respect         |
| <input type="checkbox"/> Courage       | <input type="checkbox"/> Honesty         | <input type="checkbox"/> Self-Discipline |
| <input type="checkbox"/> Creativity    | <input type="checkbox"/> Humility        | <input type="checkbox"/> Self-Respect    |
| <input type="checkbox"/> Determination | <input type="checkbox"/> Independence    | <input type="checkbox"/> Service         |
| <input type="checkbox"/> Diversity     | <input type="checkbox"/> Innovation      | <input type="checkbox"/> Simplicity      |
| <input type="checkbox"/> Empathy       | <input type="checkbox"/> Integrity       | <input type="checkbox"/> Spirituality    |
| <input type="checkbox"/> Equality      | <input type="checkbox"/> Interdependence | <input type="checkbox"/> Stability       |
| <input type="checkbox"/> Excellence    | <input type="checkbox"/> Justice         | <input type="checkbox"/> Teamwork        |
| <input type="checkbox"/> Fairness      | <input type="checkbox"/> Knowledge       | <input type="checkbox"/> Thrift          |
| <input type="checkbox"/> Faith         | <input type="checkbox"/> Leadership      | <input type="checkbox"/> Tradition       |
| <input type="checkbox"/> Family        | <input type="checkbox"/> Love of comfort | <input type="checkbox"/> Transformation  |
| <input type="checkbox"/> Freedom       | <input type="checkbox"/> Love of others  | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Generosity    | <input type="checkbox"/> Loyalty         | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Good sense    | <input type="checkbox"/> Patience        | <input type="checkbox"/> Other: _____    |
| <input type="checkbox"/> Hard work     | <input type="checkbox"/> Peace           | <input type="checkbox"/> Other: _____    |

### Issue Areas and Concerns

Following are words or phrases that describe issue areas and concerns that you may care about as a contributor. The areas listed are only for inspiration. You may never have donated time or money to these areas of interest before; this exercise is simply to give you the chance to recognize what has meaning for you among things you could give to. Put check marks next to those that have the most meaning for you. Then go through the list again and circle your top three.

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Aging                            | <input type="checkbox"/> Catholic charities       | <input type="checkbox"/> Death and dying        |
| <input type="checkbox"/> Animals and species Preservation | <input type="checkbox"/> Children or child care   | <input type="checkbox"/> Demilitarization       |
|   | <input type="checkbox"/> Civil rights             | <input type="checkbox"/> Disability rights      |
| <input type="checkbox"/> Anti-Semitism                    | <input type="checkbox"/> Coexistence              | <input type="checkbox"/> Disaster relief        |
| <input type="checkbox"/> Anti-Racism                      | <input type="checkbox"/> Community gardens        | <input type="checkbox"/> Domestic violence      |
| <input type="checkbox"/> Arts and art institutions        | <input type="checkbox"/> Computer literacy        | <input type="checkbox"/> Drug and alcohol abuse |
| <input type="checkbox"/> Biodiversity                     | <input type="checkbox"/> Corporate responsibility | <input type="checkbox"/> Economic justice       |
| <input type="checkbox"/> Boys                             | <input type="checkbox"/> Cultural heritage        | <input type="checkbox"/> Education              |
| <input type="checkbox"/> Business development             |   |   |

**Exercise 2.3**  
**Vision and Values, Cont'd**

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Elder care                                      | <input type="checkbox"/> Immigrant and refugee rights and services | <input type="checkbox"/> Poverty solutions                          |
| <input type="checkbox"/> Electoral reform                                | <input type="checkbox"/> International development                 | <input type="checkbox"/> Prison reform                              |
| <input type="checkbox"/> Employment training and job creation            | <input type="checkbox"/> Islamic causes                            | <input type="checkbox"/> Public policy or advocacy                  |
| <input type="checkbox"/> Environment or environmental justice            | <input type="checkbox"/> Jewish causes                             | <input type="checkbox"/> Religion                                   |
| <input type="checkbox"/> Faith-Based community service                   | <input type="checkbox"/> Legal aid and services                    | <input type="checkbox"/> Reproductive rights                        |
|  | <input type="checkbox"/> Libraries                                 | <input type="checkbox"/> Science and technology                     |
| <input type="checkbox"/> Gay, lesbian, bisexual, or transgendered rights | <input type="checkbox"/> Literacy                                  | <input type="checkbox"/> Seniors                                    |
|  | <input type="checkbox"/> Media                                     | <input type="checkbox"/> Spiritual development                      |
| <input type="checkbox"/> Girls   | <input type="checkbox"/> Medical research                          | <input type="checkbox"/> Sports and recreation                      |
| <input type="checkbox"/> Global climate change                           |  | <input type="checkbox"/> Sustainability and sustainable development |
|  | <input type="checkbox"/> Native and indigenous peoples' rights     | <input type="checkbox"/> Women's leadership and civil liberties     |
| <input type="checkbox"/> Gun control                                     | <input type="checkbox"/> Nutrition and hygiene                     | <input type="checkbox"/> Youth development                          |
| <input type="checkbox"/> Health care and prevention                      | <input type="checkbox"/> Parks and land preservation               | <input type="checkbox"/> _____                                      |
| <input type="checkbox"/> HIV and AIDS                                    | <input type="checkbox"/> Peace or conflict resolution              | <input type="checkbox"/> _____                                      |
| <input type="checkbox"/> Homelessness and housing                        | <input type="checkbox"/> Philanthropy and volunteerism             | <input type="checkbox"/> _____                                      |
| <input type="checkbox"/> Homophobia                                      |  | <input type="checkbox"/> _____                                      |
| <input type="checkbox"/> Human rights                                    |  |   |

**Reflection: Do you see a relationship between your top values and your top interest areas? Here are two examples:**

- My top three values are dignity, equality, and opportunity, and my top

## Exercise 2.4

### Indicators of Your Values

**15–20 minutes**

**In whatever way works best for you—free writing, quiet thought, or a conversation with a friend—explore one or more of the following questions that you find interesting. Write your answers below.**

- ☐ **What experiences and people have been key in shaping your core values and passions?**
  
  
  
  
  
  
  
  
  
  
- ☐ **What do you notice about your values when you consider your choices, such as life directions, career, free time, lifestyle, donations, and spending?**
  
  
  
  
  
  
  
  
  
  
- ☐ **When you hear of world events or witness an injustice, what moves you most? With what have you been most troubled? Most delighted?**



# Donor Diva

- ➔ Although much of a giving plan focuses on financial contributions, inspired giving often comes from an integration of giving time, talent, treasures, and social connections. Volunteering with an organization provides intimate information about the needs and effectiveness of the organization.

**Exercise 2.5**  
**Making Choices**

**20 minutes**

- ☐ **How should I make the important decisions of where to allocate my philanthropic dollars?**
- ☐ **Should I get help from other family members or friends, or from people who may be more active in the community or knowledgeable than I am at this time?**
- ☐ **Should I share the responsibility and privilege of decision making or giving with others who are from the communities I aim to serve?**
  
- ☐ **How will I get the information I need? How much can I find out on the Internet, and how much time will I spend doing so? To answer any remaining questions, how much time will I allocate?**
  
- ☐ **How much time overall will I devote to my giving: about the same as I do now? More than I have been? Should I give additional time to engage or partner with others?**

1. How much money shall I give? Will this money come from income only, or could I raise or give more from other sources? Shall I discuss the options I might have with a trusted advisor?

**Exercise 2.6**  
**Time, Talents, and Treasures**

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**15–25 minutes**

**In the list below put a check mark next to each characteristic or item that is true for you. These may stimulate you to think of specific ways you want to share your abilities in the second part of the exercise.**

- ☐ **I can donate my professional skills to a nonprofit.**
- ☐ **My workplace has equipment or services or a meeting space I could offer to a nonprofit for their use.**
- ☐ **I'm good at organizing details and creating plans.**
- ☐ **I'm good at motivating people.**
- ☐ **I'm good at planning events and giving parties.**
- ☐ **I know many people in my community who might be good resources.**
- ☐ **I like to teach what I know.**
- ☐ **I am a good listener or writer.**
- ☐ **I have experience designing or administering Web sites.**
- ☐ **I am a supportive person to work with.**
- ☐ **I'm good with financial information.**
- ☐ **I like to raise money.**
- ☐ **I can translate or know people who can translate documents into other languages.**
- ☐ **I have graphic skills or artistic talents.**
- ☐ **I love kids or am good with elders.**
- ☐ **I am a passionate public speaker.**
- ☐ **I have \_\_\_\_ hours of time per week, or would be willing to take a day or more each month, to donate.**
- ☐ **Other: :**

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**Now look back at the top three values and issue areas you circled in Exercise 2.3. Think about the time, talent, and resources unique to you and your community that you can offer in working on those issue areas. For example, if you're a breast cancer survivor and one of your issue areas is breast cancer, you might write, I have been through diagnoses and treatment and could help others know what to expect or simply provide**