

THE PHILANTHROPY TOOLKIT: Giving, Motivations and Values

Build the foundation for a proactive philanthropic plan.

This resource is excerpted from “The Philanthropy Toolkit: an Introduction to Giving Effectively” by Stanford Center on Philanthropy and Civil Society, copyright 2020 Board of Trustees of The Leland Stanford Junior University, used under Creative Commons Attribution 4.0 license.

1.1

CLARIFY YOUR MOTIVATIONS & VALUES

Articulating your motivations and values allows you to develop a proactive, effective philanthropic plan rather than giving reactively to funding requests. Ultimately, your motivations and values provide the anchor for decision-making at each step of the philanthropy process.

The following two activities are meant to be completed together. **Activity A** provides reflection questions to help clarify the motivations driving your giving as well as the values underlying it. **Activity B** uses **Value Cards** to help you identify the values that are most important to you.

ACTIVITIES

- A** Reflect on Your Motivation & Values
- B** Select Your Values

A

ACTIVITY

REFLECT ON YOUR MOTIVATIONS & VALUES

INSTRUCTIONS

Review the questions in Activity A to clarify your philanthropic motivations and identify the values important to your giving. Jot down your thoughts. We encourage you to consider each question fully.

REFLECTION QUESTIONS ABOUT YOUR MOTIVATIONS:

- What motivates you to give?
- What do you hope to gain from your giving?
- What are your immediate philanthropic goals?
- What are your long-term philanthropic goals?
- What do you want to sustain or keep the same in the world?
- What do you want to change in the world?

REFLECTION QUESTIONS ABOUT YOUR VALUES:

- What values are important to your giving?
- Where have you given your time and money in the past, and why?
- Where do you give your time and money currently, and why?
- What issues interest you most, and why?
- What issues feel most pressing to you, and why?
- What life experiences have shaped you, the way you look at the world, and your giving?
- What are some moments or experiences in which you felt like you had some impact on the world?

A

WORKSHEET

REFLECT ON YOUR MOTIVATIONS & VALUES

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....



ACTIVITY SELECT YOUR VALUES

INSTRUCTIONS

To help you select the values important to your giving, circle the words in the list below or use the Value Cards on the following pages or at the back of the toolkit.

For couples and families, it can be helpful to do this activity individually first, and then share your responses and discuss areas of overlap and differences.

The Value Cards deck includes the values listed below, plus some blank cards for any other values you want to highlight.

- | | | |
|----------------|-----------------|--------------------|
| ACCESSIBILITY | FAMILY | LOVE |
| ACCOUNTABILITY | FREEDOM | LOYALTY |
| AUTHENTICITY | FUN | PASSION |
| COLLABORATION | GENEROSITY | PATRIOTISM |
| COMMUNITY | GROWTH | PEACE |
| CONNECTION | HAPPINESS | PERSISTENCE |
| COURAGE | HARMONY | RESOURCEFULNESS |
| CREATIVITY | HEALTH | RESPECT |
| CURIOSITY | HONOR | SECURITY |
| DIGNITY | HUMILITY | SELF-ACTUALIZATION |
| DISCIPLINE | HUMOR | SERVICE |
| DIVERSITY | INDEPENDENCE | SIMPLICITY |
| EFFECTIVENESS | INNOVATION | SPIRITUALITY |
| EMPATHY | INTEGRITY | SPONTANEITY |
| EMPOWERMENT | INTERDEPENDENCE | STEWARDSHIP |
| EQUITY | JOY | TRADITION |
| EXPLORATION | JUSTICE | TRUSTWORTHINESS |
| FAIRNESS | KINDNESS | UNITY |
| FAITH | LEADERSHIP | WELLBEING |

B

ACTIVITY
SELECT YOUR VALUES

EQUITY	EXPLORATION	FAIRNESS
FAITH	FAMILY	FREEDOM
FUN	GENEROSITY	GROWTH
HAPPINESS	HARMONY	HEALTH
HONOR	HUMILITY	HUMOR

B

ACTIVITY
SELECT YOUR VALUES

INDEPENDENCE

INNOVATION

INTEGRITY

INTERDEPENDENCE

JOY

JUSTICE

KINDNESS

LEADERSHIP

LOVE

LOYALTY

PASSION

PATRIOTISM

PEACE

PERSISTENCE

RESOURCEFULNESS



ACTIVITY
SELECT YOUR VALUES

RESPECT	SECURITY	SELF-ACTUALIZATION
SERVICE	SIMPLICITY	SPIRITUALITY
SPONTANEITY	STEWARDSHIP	TRADITION
TRUSTWORTHINESS	UNITY	WELLBEING
WRITE IN YOUR OWN	WRITE IN YOUR OWN	WRITE IN YOUR OWN



WORKSHEET
SELECT YOUR VALUES

INSTRUCTIONS

Read through the set of Value Cards and select the top three as your "Core Values." You may choose two additional cards as your other primary values. In the space on the next page, jot down how these values might influence your philanthropy.

CORE VALUES

ADDITIONAL VALUES



WORKSHEET
SELECT YOUR VALUES

REFLECTIONS

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Additional workbooks from The Philanthropy Toolkit are available on the [Forms and Resources](#) page of NPT GivingPoint.

This resource is excerpted from "The Philanthropy Toolkit: an Introduction to Giving Effectively" by Stanford Center on Philanthropy and Civil Society, copyright 2020 Board of Trustees of The Leland Stanford Junior University, used under Creative Commons Attribution 4.0 license.