Build the foundation for a proactive philanthropic plan.

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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.

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<td><strong>A</strong> Reflect on Your Motivation &amp; Values</td>
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<td><strong>B</strong> Select Your Values</td>
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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?
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
<table>
<thead>
<tr>
<th>EQUITY</th>
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<tr>
<td></td>
<td>FAITH</td>
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### Activity

#### Select Your Values

<table>
<thead>
<tr>
<th>Independence</th>
<th>Innovation</th>
<th>Integrity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interdependence</td>
<td>Joy</td>
<td>Justice</td>
</tr>
<tr>
<td>Kindness</td>
<td>Leadership</td>
<td>Love</td>
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<tr>
<td>Loyalty</td>
<td>Passion</td>
<td>Patriotism</td>
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<tr>
<td>Peace</td>
<td>Persistence</td>
<td>Resourcefulness</td>
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## ACTIVITY
### SELECT YOUR VALUES

<table>
<thead>
<tr>
<th></th>
<th>RESPECT</th>
<th>SECURITY</th>
<th>SELF-ACTUALIZATION</th>
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<tbody>
<tr>
<td>SERVICE</td>
<td>SIMPLICITY</td>
<td>SPIRITUALITY</td>
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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

[Blank boxes for three values]

Additional Values

[Blank boxes for two values]