

# THE PHILANTHROPY TOOLKIT: Narrow Your Focus Areas

Organize your philanthropy by focusing on the issues that matter most to you.

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## 1.2

# NARROW YOUR FOCUS AREAS

The simplest way to organize your philanthropy is to focus on several specific issues, rather than giving across many issues. While your philanthropic budget certainly can allow room for reactive and emergency giving (see **Section 4: Structuring Your Giving**), narrowing your focus areas for proactive giving helps prioritize your resources.

This is true even if your philanthropy is concerned with a particular community—for you cannot give to every possible cause. It is also true for donors who are motivated by the philosophy of effective altruism, which is concerned with alleviating the conditions of abject poverty and avoiding global catastrophes (see **effectivealtruism.org** for more information).

*Continued on the following page.*

### ACTIVITIES

- C** Look Back at Your Giving History
- D** Select Your Issues
- E** Craft Your Focus Statements

## 1.2

We have developed two activities to help you narrow your focus areas. Both activities help you reflect on issue areas and select a few to integrate into your initial giving plan.

### 1. LOOK BACK AT YOUR GIVING HISTORY.

**Activity C** is for donors who have a significant history of giving. This activity will help you take stock of your past giving and determine trends and themes. From there, you can understand which issues you are most passionate about, assess how you have supported them in the past, and decide whether you would like to make adjustments.

### 2. BEGIN WITH A CLEAN SLATE AND SELECT ISSUES WITHOUT RELYING ON PRECEDENT.

If you wish to start with a clean slate, **Activity D** will help you explore a range of potential issues and select those that align with your values and motivations.

We also developed a deck of Issue Cards located on the following pages and in the card deck at the back of this toolkit. The full set includes the issues listed below, plus some blank cards for any other issues you want to highlight. Potential focus areas are included on the back of each Issue Card.

ANIMAL RELATED	FOOD & NUTRITION
ARTS, CULTURE & HUMANITIES	HEALTH
CIVIL RIGHTS & ADVOCACY	INTERNATIONAL DEVELOPMENT
DISASTER PREPAREDNESS & RELIEF	LAW & SOCIETY
EDUCATION	SOCIAL SERVICES
ENVIRONMENT	OTHER

Finally, effective philanthropists often narrow their focus even further by identifying a target population and location for each issue. For example, a philanthropist who selected “education” as an issue might narrow her focus area to adolescent girls’ math education on the South Side of Chicago. **Activity E** guides you through narrowing your focus to target populations and locations.

The Issue Card categories were selected from the National Taxonomy of Exempt Entities, developed by the IRS and the National Center for Charitable Statistics to classify nonprofit organizations.

[nccs.urban.org/classification/national-taxonomy-exempt-entities](https://nccs.urban.org/classification/national-taxonomy-exempt-entities)



ACTIVITY

LOOK BACK AT YOUR GIVING HISTORY

**INSTRUCTIONS**

Review your previous contributions and volunteer work over a given period of time to identify issues that are meaningful to you.



WORKSHEET

**LOOK BACK AT YOUR GIVING HISTORY**

**INSTRUCTIONS**

Identify the period of time (e.g., number of years) you will review. In the Gifts Overview table, note the recipients, amounts, and frequency of your contributions during this period. In the Volunteering Overview table, note where you volunteered your time, how much you volunteered, and how often.

The following table reflects my giving history from \_\_\_\_\_  
to \_\_\_\_\_

**GIFTS OVERVIEW**

	ORGANIZATION / EVENT / PERSON	AMOUNT / FREQUENCY	IS THIS A ONE-TIME GIFT?
<i>Example</i>	American Red Cross	\$25 / month	No
1			
2			
3			
4			
5			



WORKSHEET  
LOOK BACK AT YOUR GIVING HISTORY

VOLUNTEERING OVERVIEW

	ORGANIZATION / EVENT	TIME / FREQUENCY
<i>Example</i>	American Society for the Prevention of Cruelty to Animals (ASPCA)	3 hours / week
1		
2		
3		
4		
5		



WORKSHEET  
**LOOK BACK AT YOUR GIVING HISTORY**

**INSTRUCTIONS**  
Based on your giving history, answer the following questions.

Where did you give the most, in terms of both your financial resources and your time?  
Are there similarities among these recipients?

.....  
.....  
.....

Which issues prompted you to give the most, in terms of both your financial resources and your time? Did you concentrate your giving in any way (for instance, more time to one issue, more money to another)? Do those issues reflect what is most important to you today? You can select from the Issue Cards or write other issues on the blank Issue Cards, and then record them below.

.....  
.....  
.....  
.....

Does your giving reflect your values? If yes, how? If no, why not?

.....  
.....

Do you see any other themes or trends in your giving?

.....  
.....



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### ACTIVITIES

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# D

## ACTIVITY SELECT YOUR ISSUES

### INSTRUCTIONS

The Issue Cards provide an overview of broad issue categories and include some blank cards for you to write in any other issues that might interest you—for example, a specific issue you already know you would like to fund. Read the Issue Cards and select the issues that you may be interested in supporting.



ACTIVITY  
**ISSUE CARDS**

**INSTRUCTIONS**  
Review the front side of the Issue Cards that include the topics below. These cards provide an entry point into an issue. There are also three blank cards so that you can write in any specific causes that might be meaningful to you.

ANIMAL RELATED	ARTS, CULTURE & HUMANITIES	CIVIL RIGHTS & ADVOCACY
DISASTER PREPAREDNESS & RELIEF	EDUCATION	ENVIRONMENT
FOOD & NUTRITION	HEALTH	INTERNATIONAL DEVELOPMENT
LAW & SOCIETY	SOCIAL SERVICES	OTHER
WRITE IN YOUR OWN	WRITE IN YOUR OWN	WRITE IN YOUR OWN



# ACTIVITY ISSUE CARDS

**INSTRUCTIONS**  
For the Issue Cards selected, review the backside of the cards and circle any specific focus areas of interest (i.e. special education, cancer), or write in focus areas meaningful to you.

<ul style="list-style-type: none"> <li>▪ Civil Liberties</li> <li>▪ Civil Rights</li> <li>▪ Democracy</li> <li>▪ Intergroup &amp; Race Relations</li> <li>▪ Voter Education &amp; Registration</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Arts &amp; Culture</li> <li>▪ Arts Services</li> <li>▪ Historical Organizations</li> <li>▪ Humanities</li> <li>▪ Media &amp; Communications</li> <li>▪ Museums</li> <li>▪ Performing Arts</li> <li>▪ Visual Arts</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Animal Protection &amp; Welfare</li> <li>▪ Veterinary Services</li> <li>▪ Wildlife Preservation &amp; Protection</li> <li>▪ Zoos &amp; Aquariums</li> <li>▪ _____</li> </ul>
<ul style="list-style-type: none"> <li>▪ Climate Change</li> <li>▪ Environmental Education</li> <li>▪ Natural Resources Conservation &amp; Protection</li> <li>▪ Pollution Abatement &amp; Control</li> <li>▪ Recycling Programs</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Adult Education</li> <li>▪ Elementary &amp; Secondary Education</li> <li>▪ Graduate &amp; Professional Education</li> <li>▪ Higher Education</li> <li>▪ Libraries</li> <li>▪ Special Education</li> <li>▪ Vocational &amp; Technical Education</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Disaster Preparedness &amp; Relief Services</li> <li>▪ Search &amp; Rescue Squads</li> <li>▪ _____</li> </ul>
<ul style="list-style-type: none"> <li>▪ International Human Rights</li> <li>▪ International Peace &amp; Security</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Diseases &amp; Conditions</li> <li>▪ Hospitals &amp; Primary Healthcare</li> <li>▪ Medical Research</li> <li>▪ Mental Health</li> <li>▪ Public Health</li> <li>▪ Rehabilitative Care</li> <li>▪ Reproductive Health</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Food Programs &amp; Security</li> <li>▪ Nutrition</li> <li>▪ _____</li> </ul>
<ul style="list-style-type: none"> <li>_____</li> <li>_____</li> <li>_____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Children &amp; Youth Services</li> <li>▪ Fair Employment</li> <li>▪ Family Services &amp; Assistance</li> <li>▪ Housing &amp; Shelter</li> <li>▪ Labor Unions</li> <li>▪ _____</li> </ul>	<ul style="list-style-type: none"> <li>▪ Criminal Justice Reform</li> <li>▪ Crime Prevention</li> <li>▪ Law Enforcement</li> <li>▪ Legal Services</li> <li>▪ Protection Against Abuse</li> <li>▪ Rehabilitation Services</li> <li>▪ _____</li> </ul>
<p>WRITE IN YOUR OWN</p>	<p>WRITE IN YOUR OWN</p>	<p>WRITE IN YOUR OWN</p>

D

WORKSHEET  
**SELECT YOUR ISSUES**

**INSTRUCTIONS**

Review the front side of the Issue Cards. Think about your personal interests, particularly segments of society you want to help, and their specific needs. Then select up to five cards that resonate most with you. Next, review the backs of your selected cards. Circle the focus areas you noted as being of interest (e.g. special education, cancer) or write in focus areas that are meaningful to you. Note any reflections you have in the space on the next page.





ACTIVITY

CRAFT YOUR FOCUS STATEMENTS

A focus statement frames your values and motivations and connects them with your philanthropic intentions. A strong focus statement can help guide your philanthropic plan. While you may want to have an overall giving statement the same way some nonprofits have vision and mission statements, we recommend also creating a separate focus statement for each issue, including the specific population and location you would like to serve.

**EXAMPLE**

*We aim to address education inequality for low-income secondary school students in Grand Rapids Public Schools because this aligns with our commitment to equity in public education.*

**INSTRUCTIONS**

Craft short statements that articulate your intention for how to address each of your selected focus areas.

If you don't yet feel ready to articulate focus statements, you can return to them later in this toolkit or as you actually engage in giving, recognizing that they may change over time.

If you need additional inspiration, you can look online for various resources on crafting vision, mission, and focus statements. Feel free to borrow from statements that inspire you and rework them to make them your own.

# E

## WORKSHEET CRAFT YOUR FOCUS STATEMENTS

### INSTRUCTIONS

Complete the statement below, using your selected Value Cards and Issue Cards to identify the essential components. Craft focus statements for each of your focus areas in the space below.

We aim to address **[WHAT]** for **[WHO]** **[WHERE]** because this aligns with our commitment to **[WHICH VALUES]**.

- WHAT:** What causes/issues do you want to address with your philanthropy (e.g., environment, education, animal-related)?
- WHO:** Who will benefit from your philanthropy (e.g., people experiencing homelessness, children from low-income backgrounds, abused animals)?
- WHERE:** Where, geographically, will you focus your philanthropy (e.g., a specific location, locally, statewide, nationally, globally)?
- WHICH VALUES:** Which values are driving your goal (e.g., respect, diversity, empathy)?

*Example:*

We aim to address **EDUCATION INEQUALITY** for **LOW-INCOME SECONDARY SCHOOL STUDENTS** in **GRAND RAPIDS PUBLIC SCHOOLS** because this aligns with our commitment to **EQUITY IN PUBLIC EDUCATION**.





WORKSHEET  
**CRAFT YOUR FOCUS STATEMENTS**

Keep these four principles in mind:

- Be specific.
- Use simple language (avoid buzzwords).
- Keep it concise.
- Make it actionable.

**1.**

We aim to address .....

for .....

.....

because this aligns with our commitment to .....

.....

**2.**

We aim to address .....

for .....

.....

because this aligns with our commitment to .....

.....



WORKSHEET  
**CRAFT YOUR FOCUS STATEMENTS**

**3.**

We aim to address .....

for .....

.....

because this aligns with our commitment to .....

.....

**4.**

We aim to address .....

for .....

.....

because this aligns with our commitment to .....

.....

**5.**

We aim to address .....

for .....

.....

because this aligns with our commitment to .....

.....

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