



## Personal Giving Mission Profile

*“The best predictor of joyful, habitual, high-impact giving is having a committed giving mission . . . and acting on it.”*  
- Profile User

### Benefits of a Personal Giving Mission:

- ❖ Control your giving and be able to say “yes” or “no” to any giving request . . . and feel good about your decision
- ❖ Pinpoint your giving values, passions, expectations and intent
- ❖ Transform your giving “interest” to “intention” into “action”
- ❖ Surface giving blocks and dissolve them
- ❖ Reach consensus on individual and family giving priorities
- ❖ Build trust between givers and askers
- ❖ Commit to an Action Plan you’ll enjoy putting to work



Developed in part with questions stimulated by the BioData Profile by Ross Stewart, PhD and some of the appreciative inquiry questions by Jana Green.

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Invitation: e-mail any additional giving mission questions you craft and receive a free copy of the “Donors Report Card for Rating Giving Opportunities”™.

*“Giving is a learned art and behavior. It starts with crafting a giving mission.”*  
- Worksheet User

# Interview Questions



Recall an early giving experience positive or negative. Draw a picture of it and/or talk about it.

Now have your partner interview you asking each question. Have them write down your answers for you so you can concentrate on the questions.

1. What about that early giving experience was memorable (positive or negative)?
2. What decisions do you believe you made back then as a result of that early giving experience, that influence your current decisions to give or not give?
3. Which of those decisions still serves you today and which would you like to change?
4. Think of someone who you believe is a great giver. How do you know (recognize) that they are doing a good job in their giving?
5. For you, what's important about giving? (Examples: "making a difference" and "feeling good" – write down exactly what your partner says to this question)
6. What would having that (repeat exactly what your partner says in question 5, (Example: "making a difference" "feeling good") \_\_\_\_\_ do for you?
7. Tell me about a giving experience that left you disappointed. What did you learn from that experience that you would apply in your future giving?
8. Which nonprofit community causes, projects, services or facilities or personal interests/causes are so important to you (or those you care about), that if they disappeared it would seriously reduce the quality of your life?
9. What would you have to see, hear, feel, experience in order to be moved to give?

10. What do you want to create or expand that would add to the quality of your life or that of others you care about?
11. What else motivates you to give? (Complete the “Check List For Assessing Personal Motivations For Giving Now™”)
12. What are you drawn by to give to? (Name your top 3 community or personal interests/passions -- Example: Literacy, AIDS, Historic Preservation, Cross-Cultural Programs, Grand Kids’ College Education...)
13. What specifically do you intend to give?
  - a. Talents/Abilities: (Example: Fundraising, desktop publishing, carpentry)
  - b. Time: (How many hours a week/month right now?)
  - c. Energy/Encouragement/Hope: In what form? (Examples: Listening, Coaching)
  - d. Services, in-kind donations, stock, real estate, antiques, insurance
  - e. Dollars: (Amount to be designated along with spouse, children, partner as part of regular budgeting)
  - f. To which specific organizations, causes, or projects (Name them)?
14. What do you want for yourself when giving and how would you like to be acknowledged and NOT acknowledged for your gifts in #13?
15. What might block you from acting on your giving mission now . . . and what will you do to dissolve those blocks in the next month?



***“It’s one of the most useful tools I have ever come across to empower givers and build trust with askers. Just talking about giving won’t do it. Acting on ones mission will.”***  
- Michael Murray, President, Creative Interchange Consultants, Austin, Texas

## Example of a Personal Giving Mission

**My giving mission is to give of my (Talents, Time, Hope, In-Kind, \$)**

*“First Aid skills, accounting skills and 1:1 coaching skills – 2 hours a month to each charity – plus 1:1 coaching of youth, \$950 per month to each charity named in monthly automatic payments. In addition I will designate in my estate plan that 20% of my Intel stock will be divided equally among each of the named charities at the time of my death.”*

**To: (Names of Causes):**

*Habitat for Humanity Northwest and SOLV.*

**In a way that (Intended Results For Giver/s):**

*“I give back what they gave to me as a youth, we spend volunteer time as a family and we feel excited about doing it year after year because we see measurable results from our giving. We would like to donate a public outdoor bench to the Habitat for Humanity and have our family’s name appear on it. No other recognition is desired.”*

**So that (Intended Results for the Recipient/s):**

*“Recipients will want to give some of what they receive to someone else, feel it was a partnership and not a hand-out and know they gained a friend who learned from them too.”*

**Draw a picture of your future giving and tell what it means to you:**

*“I give my dollars in a low profile way and measure results.”*



## Draft of My Personal Giving Mission

**My giving mission is to give of my (Talents, Time, Hope, In-Kind, \$)**

**To: (Names of Causes):**

**In a way that (Intended Results For Giver/s):**

**So that (Intended Results for the Recipient/s):**

**Draw a picture of your future giving and tell what it means to you:**



Version 1.1

## Sample Family Giving Mission

Our family giving mission is to give regularly and joyfully of our talent, time, hope, dollars and other assets. We seek out opportunities to give that meet our criteria of:

- Assisting the recipient - individual or organization to become more self- sufficient
- Conducting due diligence before making major gifts
- Receiving feedback on what our dollars and time are going to accomplish . . . and what they did accomplish
- Transferring our family's values to our children by making giving decisions together
- Giving of volunteer time with our children before giving major dollars to a cause
- Supporting start-up projects that have high potential and involve some risk that is managed, monitored and debriefed
- Giving to support an organization's legitimate overhead as well as project costs
- Aligning with others to leverage our giving by being part of a giving circle
- Giving to projects that address roots causes and prevention of spouse abuse, malaria and bullying. Supporting women's village savings groups and young artist cooperatives. Funding technology that delivers on-line job skill training worldwide.
- Giving to projects and causes that are inclusive in terms of race, color, creed, and nationality
- Encouraging the recipient to "give forward" to someone else some of what they have received to others to become a partner in the upward spiral of giving . . . receiving . . . giving . . .
- We embrace the belief that we do the good that we do . . . in part for the good that giving does us.
- We believe that "It is through giving and receiving that we discover who we are and what matters to us".

\_\_\_\_\_ Date

\_\_\_\_\_ Date

\_\_\_\_\_ Date

\_\_\_\_\_ Date



## **Our Giving Mission in Action (Sample)**

We are giving of our time and skills in organizational development and financial management, 2 hours a month to each named charity, plus 1:1 coaching of youth 2 hours weekly, \$950 per month to each charity named in monthly automatic payments. In addition we have designated in our estate plan that 20% of our stock will be divided equally among each of the named charities at the time either of our deaths.”



## PhilanthropyNow Check List for Assessing Personal Motivations for Giving™

I am considering giving to this cause/organization because:  
(Rank Order you top 5 reasons)

- A. Have an obligation to give by virtue of being alive
- B. Received a lot from the cause or organization and want to give back
- C. Believe strongly in the cause or organizations purpose
- D. Feel guilty about not giving
- E. Believe that what I give comes back to me
- F. My spiritual tradition expects that I will give/tithe
- G Am being influenced to give by someone else
- H. Feel good when I give
- I. Feel less bad when I give
- J. Want to model giving for my family and transfer that value to the next generation
- K. Want the positive public profile that it will bring
- L. Am at end of life and want to leave a legacy
- M. Want the tax advantages and don't want the government to get it
- N. Want to control where the money goes and how it's used
- O. Want to brand our family's name as an icon of generosity
- P. Want to make good giving, good business by engaging in cause-related/branded giving.
- Q. Other:

Reflection: Which of the motivators enliven you when you think about them?