

A Monday Morning Checklist: What Are My Values and Beliefs?

The questions posed on this website aren't the kind you ask, and answer, once and for all. On the contrary, the odds are that you'll find yourself coming back to one or more of them at various points (and in various combinations) throughout your philanthropic journey. And yet, you can't ask questions forever; sooner or later you must make decisions. So how can you tell whether you've wrestled with a question sufficiently to move on? In our experience, each of these questions has some relatively clear indicators of progress. If you can check many of these markers off your Monday morning to-do list, then you're probably well on your way to giving smart!

- You've decided what portion of your philanthropy will focus explicitly on results.
- You've written down your values and beliefs.
- You've discussed your values and beliefs with your spouse, family, and, if appropriate, your foundation leadership.
- The people most relevant to your giving know what you do, and do not, care about.
- You have anchor points for your current philanthropic initiatives.
- If you've been at this for a while, you've stepped back at least once to test how well your values are informing your philanthropic decisions.

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