

Statement of Values and Beliefs Worksheet

1. Clarify and express your values and beliefs

Start by asking yourself the following questions and capturing your answers in the space below. For other ideas on how to answer these questions, and for tips on facilitating this process with others, see the resources at the end of this guide.

- What motivates you to give? (Some possibilities might include your spiritual beliefs, or a desire to help others as you were once helped.)

- What values have your family and other role models passed on to you?

- What past experiences have shaped your beliefs or your thinking?

- What interests or concerns you—for instance, which stories do you read first in the newspaper or online?

- Where have you spent your time and money in the past? Why?

Notes:

2. Prioritize your “anchors”

Consider how these values and beliefs translate into specific anchors—the people, places, problems, pathways, and/or philosophies—that will help you to narrow where you might want to direct your resources. For more on this process, visit [here](#).

- **People:** defined by a population and their unique circumstances (e.g., impoverished children)

- **Places:** defined by the health and vitality of a location (e.g., a neighborhood such as Harlem or an ecosystem such as the San Francisco Bay Delta)

- **Problems:** defined by a potential harm or obstacle to human or environmental well-being (e.g., low graduation rates or climate change)

- **Pathways:** defined by a belief in a particular solution or approach (e.g., the power of a mentor to guide and teach youth or the power of technology to solve health challenges)

- **Philosophies:** defined by a viewpoint on how the world works or should work (e.g., promoting democratic principles)

Notes:

3. Generate a statement

In the space below, compose a statement of values and beliefs that summarizes a direction for your giving. First, you may want to include a few sentences on your values, drawn from your work in step 1. Second, you can highlight the giving anchors that you have identified in step 2.

Once you're done, ask yourself whether someone unknown to you could read the statement and interpret—at the level of detail you are envisioning—the guidelines you seek for your philanthropy. If you wish to make this a statement of donor intent, rather than a mission statement, you will want to incorporate more detail in your statement. As a rule of thumb, a statement of donor intent might be twice the length of a mission statement.

4. Test with others

Crafting your statement of values and beliefs might be a deeply personal exercise or, you may involve many in your family. Either way, you will likely want to test your draft with other important people in your life, whether family members or advisors. Ask them what the statement means to to them: For example, what they would imagine to be “in” and “out.” This way, you can make sure that your intentions are coming through as clearly as possible.

Additional Resources

These materials can help you clarify your beliefs and prioritize your anchors.

- “[Giving Together: A Primer for Family Philanthropy](#),” The Philanthropic Initiative, 2006.
- Thomas J. Tierney and Joel L. Fleishman, [Give Smart: Philanthropy That Gets Results](#), (Public Affairs, 2011).
- Amy Zell, “[Giving Guide: What’s Important to You?](#)”, Greater Kansas City Community Foundation.