



GiveSmart

Finding Your Philanthropy Compass

Collaborating to accelerate social impact

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Let's say that you decide to strike out on a new adventure. While you may not have a specific destination in mind yet, you will likely seek some guidance so you don't get hopelessly lost or make rookie mistakes as you explore new terrains.

This toolkit is for philanthropists who are getting serious about their philanthropy: ramping up, becoming more intentional, becoming more strategic. It is a compass that can help guide your philanthropic hopes and dreams. You'll use your values and beliefs as a North Star to navigate the journey towards getting better results. You'll factor in the practical realities of what your time, money, and influence can really achieve. And along the way, this compass will provide a steady guide for you as you navigate this journey, and for those who come after you.

This toolkit is for philanthropists who are ramping up and becoming more strategic about their philanthropy.

Finding Your Philanthropy Compass: Section-by-Section

- Get Started
- Identify Your Values and Beliefs
- Translate Your Values and Beliefs into Strategic Initiatives
- Prioritize Your Strategic Initiatives and Seek Advice
- Reflect on Your Giving Journey
- Appendix
 - Donor Values and Beliefs: Sample Statements
 - Statement of Values and Beliefs Worksheet
 - Giving Checklist

Get Started

At the height of the late-'90s internet boom, eBay founder Pierre Omidyar was faced with a dilemma: Having made a fortune through his web startup, he wanted to take his philanthropy to another level, but he wasn't sure how to go about it. It wasn't that Pierre and his wife, Pam, had no experience giving away money; like many generous people, they had a long history of writing checks to favorite organizations. But faced with new wealth, the Omidyars came to believe that writing checks wasn't sufficient. "There were too many good causes," Pierre told a *Forbes* reporter in May 2000. "How do you do it well?"

On the counsel of other successful Bay Area philanthropists, the Omidyars established the Omidyar Foundation to make gifts to nonprofits. But they soon came to believe that even this approach wasn't enough to achieve the social results that they desired. And so, guided by a philosophy that "business could also be an effective tool for making the world a better place," they pivoted and established the Omidyar Network, which combines traditional grantmaking tools and for-profit social investments to achieve social change.

Before you take any action, it is important to consider essential questions for getting started.

As the Omidyars learned, getting involved—really involved—in philanthropy can be like going on a voyage in uncharted waters. It is exciting to explore your beliefs and aspirations, learn from experts and practitioners, and experiment with different types of grants and organizations.

So great are social and environmental needs, however, that it's also very often difficult to decide where to start, how to proceed, and how much time, effort, and funding to expend in any given direction—particularly when you are giving very large sums of money, and planning to keep giving for a long time. The recommendations contained in these pages are designed to help you prepare for your own journey. But before going any further it is important to consider a few essential questions.

Getting involved—really involved—in philanthropy can be like going on a voyage in uncharted waters.

Questions to ask before you begin

You aspire to make a real and lasting difference in the world, and so you have decided to get more involved in philanthropy. Before you take any action, however, it is important to consider the following questions for getting started:

Have I thought about how my family and others close to me will be involved in my giving? In particular, am I (or are we) clear on whether and how I/we will make decisions?

If you answered “no” to either of these questions, take some time to think through the appropriate roles for those around you. You may do this alone, or with someone you trust deeply.

Have I determined how much of my time I’m willing to commit to this process?

Your initial answer to this question doesn’t have to be set in stone, but having a general sense—whether this will be a few hours a week or a full-time job for you—will help you set reasonable expectations for what you’ll be able to accomplish. (Bear in mind, it’s not unusual to wind up surprised by just how much time you will spend once the process is underway.)

Have I settled on one or more legal structures through which to conduct my giving?

What giving instruments will you employ—for example, a private foundation, a donor-advised fund (DAF), or some combination of both—early on? There are tax and other legal implications regardless of your choice, so working with a lawyer or financial advisor is your best bet here. If you’re not familiar with your options, you will want to learn more before consulting an advisor. You may find that you will reassess the appropriate structure for your giving over time. (For more, see [“What Legal Structure or Structures Should I Use to Give My Money Away?”](#))

Have I decided whether I will give beyond my lifetime?

Deciding on when you want to give your money away depends on your personal beliefs and goals. If you believe that the problems you’re addressing will stick around for the foreseeable future, you might choose to invest in a foundation that makes grants in perpetuity. Or, you may choose to let those who come after you deal with the problems of the future while you choose to invest more in those around you today, and, so, set an end date for your philanthropy. As you think through this question, it may be useful to understand these considerations and others, as well as how other donors have approached the decision. For more, see [“The Philanthropist’s Dilemma: Do I Spend Down or Form a Foundation in Perpetuity?”](#)

Identify Your Values and Beliefs

Consider the experience of Steven Hilton. Having risen through the ranks of the foundation started by his grandfather Conrad N. Hilton to become its president and CEO, Steve was faced with the challenge of interpreting his grandfather's philanthropic intent for the present day. Fortunately, Conrad—founder of the hotel chain that bears his surname—had the foresight to leave clear but flexible guidelines. Written more than 30 years prior, Hilton's will advised his heirs to “relieve the suffering, the distressed, and the destitute” and to never allow people “abandoned to wander alone in poverty and darkness.” Today, the Hilton Foundation honors those words by investing in a host of causes, all focused on “improving the lives of disadvantaged and vulnerable people throughout the world.” (To read more about Conrad Hilton's legacy, see “[The Hilton Foundation Sees a Need—and Finds a Partner.](#)”)

Like Conrad Hilton, savvy philanthropists don't just tell others about what matters to them, they also capture these ideas by writing them down. Writing down what you care about and why—and how your values and beliefs will help you make funding decisions—is important for two reasons. First, establishing some guardrails up front will help you respond to what may soon feel like an endless number of requests for funds. Without them, it is easy to become overwhelmed by the number and type of opportunities to do some good, and it may become hard to say no to potential grant recipients. Second, clearly articulating your values and beliefs will also help everyone else who has a stake in making decisions on your behalf—now and potentially long into the future.

That clear articulation is crucial: If such statements of intent are unclear, they can leave confusion in the benefactor's wake. Recall the case of Leona Helmsley, who left more than \$5 billion to her charitable trust, accompanied by multiple, unclear “mission statements” on how to spend that money. Confusion and disagreement over Helmsley's intent landed her trustees in court to seek guidance on how to spend the fortune. For more on the case of Leona Helmsley, visit the Philanthropy Roundtable's article [here](#).

How to communicate your values and beliefs

There is no single right way to communicate your philanthropic values and beliefs, but you may find these two common devices helpful:

- A **mission statement** is a statement of the overall values that guide your giving. Mission statements are typically short (as short as a sentence, or a single paragraph), and provide a useful overview lens through which to consider decisions.

- A **statement of donor intent** or philanthropic purpose, typically longer than a mission statement, adds color and detail to your organization's mission. In the words of [The Philanthropic Initiative](#) (TPI), a leading philanthropy advisory, a statement of donor intent is “a recording created to share your motivations, hopes and goals with heirs, successor trustees and/or beneficiaries of your philanthropy in a direct, personal and enduring way.”

Deep personal values tend to change little—and as a result, they can provide a continuing touchstone throughout a lifetime of philanthropy. So before you start to write a mission statement or statement of intent, it can be useful to put down some “anchors” by identifying those particular values around which you think you want to center your giving choices. We call these anchors the “**Five Ps**”: Are there certain *people, places, problems, pathways* (i.e., particular approaches or solutions), and *philosophies* that matter to you, and, if so, how will they define your giving? Use these anchors to ground your approach to giving. Then build on that foundation to flesh out the type of statement that works best for you.

For some inspiration, see [Donor Values and Beliefs: Sample Statements](#) for a few examples of how leading donors have expressed their values and beliefs.

You may also find the [Statement of Values and Beliefs Worksheet](#) useful. You can print it out and use it to help to direct your thinking about your values and beliefs and generate your own statement.

Translate Your Values and Beliefs into Strategic Initiatives

Philanthropy is a public expression of personal values. Once you have identified your values and beliefs, you can use them to help make difficult, often public, decisions. Distilling your interests into certain areas of focus, upon which you might build individual giving strategies can help set clear boundaries for those seeking your help.

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That's not to say that *all* of your philanthropy should necessarily be “strategic.” It's worth reflecting first on the philanthropic obligations you already have—for example, organizations you or other family members have donated to for a long time and plan to keep on supporting. You may also wish to designate a certain amount of money as being “in reserve” for the explicit purpose of responding to personal requests that fall outside of your

core values and beliefs, say to give back to institutions that have meant something to you or to allow for other family members to contribute to their own passions. With your remaining giving resources, you can decide whether you'd like to focus on one issue or fund several different issues.

Consider the experience of Peter and Jennifer Buffett. In 2006, the Buffetts were faced with a tough but enviable task: Peter's father, Warren, gave his son and daughter-in-law \$1 billion to do as they wished philanthropically. Though Peter and his wife had been involved in philanthropy for some time, mostly giving to small social service and arts causes in Milwaukee, the new sum posed a thrilling new challenge—Peter called it “the Big Bang.” Given their expansion in resources, the Buffetts felt compelled to look beyond the United States and take a more global view, and set out on a fact-finding mission through Asia and Africa. Throughout their travels, they were particularly troubled by the power imbalance between men and women. The firsthand observation of these power imbalances led them to focus their giving on women and girls and preventing violence. As they learned more about the issues women and girls face, they developed an interest in social and emotional learning as a pathway to address such challenges. For the Buffetts, these three interests converged around a single strategic initiative, which led them to begin directing a significant portion of their newfound resources to organizations such as the International Rescue Committee and Women for Women International, which had long histories of working on improving the status of women and girls. (For more on the Buffett's philanthropy, see “[The Buffetts Find ‘The Sound.’](#)”)

How to translate your beliefs into strategic initiatives

In many cases, like the Buffetts, you'll find the things you care about tend to coalesce into themes. There's no right answer to how to organize your giving—other philanthropists, like Ray Chambers, have chosen to pursue multiple strategies. Chambers' interests in promoting world peace and supporting his hometown, Newark, New Jersey, have led him to pursue two independent strategic initiatives. One is to eradicate malaria globally by employing both his money and his business experience; another seeks to revitalize the social and economic infrastructure of Newark primarily by expanding youth mentoring efforts. You'll need to consider how integrated you want your philanthropy to be, and very likely want to revise these areas over time as you learn more.

Once you have identified which and how many areas you will support, you will then likely need to prioritize among them.

Prioritize Your Strategic Initiatives and Seek Advice

Since every worthy cause needs significant philanthropic support, the division of resources among your initiatives is a combination of a personal choice and getting really honest with yourself about what change you can realistically accomplish with the resources at hand. (To see how other philanthropists have wrestled with fundamental philanthropy questions, see “[Galvanizing Philanthropy](#).”) Ask yourself: From a personal values perspective, how do I want to invest my time and resources across my different initiatives? Do I care about everything equally? Favoring one cause over another is fine, but you’ll want to consider the tradeoffs and implications—for example, the extent to which you would like to be able to use your resources to affect a given issue.

It is important to be clear about your starting point early on; however, it’s also likely that your priorities, and your approach, will evolve over time, as you learn more and start seeing results.

Directing your resources to strategic initiatives

Once you’ve made some initial choices—but before you engage in funding—it will be important to do some reality checking. Gathering information on the “landscape” will help. You will likely want to ask questions about the size of the problem, the number of people involved, the geographic scope, and other major funding this cause receives. Is it reasonable to imagine you could have an impact with just a portion of your philanthropic dollars? Do the resources that you’ll be committing seem sufficient to fund and sustain your initiatives? If not, you may want to re-jigger your allocations, or narrow your focus in a given area, such that you can set a goal that is achievable with the resources at hand.

Consider, for example, how three philanthropists sought to influence education on very different levels by defining problems differently and investing accordingly:

- **Changing systems on a national scale.** In 2011, the Walton Family Foundation announced an ambitious, \$157 million [investment in education reform](#) aimed at increasing school choice among low-income families. Its three-pronged strategy involves efforts to influence public policy, to create new schools, and to improve existing ones.
- **Influencing local districts.** The Eli and Edythe Broad Foundation works on

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education reform across a broad platform of strategies, but one of its most targeted investments is an annual award of \$1 million to an urban district that demonstrates improvements in student achievement.

- **Supporting a single nonprofit.** [John Simon's](#) support of The Steppingstone Foundation, a \$3 million, Boston-based nonprofit, didn't set out to solve a big, national problem, but instead to address the specific needs of one organization serving middle school students.

You don't have to have your initiatives mapped down to the penny—more detailed planning will come later. The goal, early on, is to gauge whether your resources are generally “right-sized” to the task at hand. As you gather information, and see results on the ground, you will want to revisit your decisions to account for what you are learning.

How will I reach my goals for each of these initiatives?

Determining your strategic initiatives goes only a short distance to helping you make decisions about where you will devote your resources. Will you write checks to existing organizations? Fund research in your area of interest? For answers to some of these questions, you'll ultimately want a plan for each of your focus areas. If you simply want a brief overview of different types of strategies philanthropists have employed, visit “[When You've Made Enough to Make a Difference.](#)” (Stay tuned for our forthcoming “Strategy Guide” for more help.)

Regardless of the specific initiatives you pursue, the act of ramping up your giving will likely demand an added commitment of time and skills to enact them. The next few sections will help you think about the specific tasks that your strategic initiatives might require of you, and how you might access outside support for tasks that you cannot or choose not to perform.

What tasks will my philanthropy require?

[The Giving Checklist](#) provides a list of all the different tasks that ramping up your philanthropy might require you to conduct. This checklist is meant to be completed in two parts. First, tailor it according to your own particular situation (e.g., your legal structure, your organization's size, the amount of time you would like to devote). For example, if you're working through a private foundation, you'll need to establish a board of directors by law. If you're acting through a donor-advised fund, you will need very little, if any, investment management support, as DAFs typically manage your philanthropic assets for you. If you're not clear on the particular demands of your preferred structure, be sure to consult your attorney or financial advisor.

Next, for each task that you're going to conduct, decide if you expect to perform it on your own, or whether you'll seek help. Do you have the time, energy, and required knowledge to conduct each of these activities? Many philanthropists tend to start by doing most of the work on their own, or with a very small group of people, and then, as the demands on their time start to build up, they bring additional hands on deck.

What should I consider when bringing in advice and help from the outside?

Outside help need not always come in the form of paid staff. There are four different sources of potential advice and support for your organization.

Volunteer advisors

You may have personal or professional networks that you can tap for advice. Think widely about your network and whose advice you respect and trust.

Paid advisors or contractors

There are many sources of outside advice, in the form of contractors and consultants, who will perform a full range of philanthropy activities from helping you write a mission statement to help with streamlining and organizing your processes, to sourcing and screening grantees, to conducting evaluations. In fact, some consultants offer to perform the entire suite of services in a one-stop shop. These advisors can be particularly useful for tasks that require a great deal of one-off capacity or for activities that are performed with some degree of regularity but are cyclical or seasonal.

Boards of directors

Will some component of your philanthropy, like a private foundation, require a board of directors? A good board of directors can be an unparalleled source of expertise across many functions. At the same time, remember that a board's proper role is governance, and avoid giving this group too many functional responsibilities.

Hired staff

On one hand, hiring professional staff can take your giving from "0 to 60" very fast by creating a year-round operation for your giving. On the other, the decision to hire professional staff is a big one, and entails much commitment up front. While in the long-run, it may free up your time enormously, it nearly always involves ceding control of at least some decisions and sacrificing some measure of day-to-day oversight over your own giving. For more guidance on hiring staff, and some pitfalls to avoid, see "[How to Think About Your First Hire.](#)"

Reflect on Your Giving Journey

Though it may seem premature, now is also a good time to begin thinking about how to incorporate learning and improvement into your philanthropy. Because there are few forces for accountability in philanthropy—no shareholders or voters to respond to—excellence in philanthropy must be self-imposed. Doing what it takes to really learn and improve over time requires a deep personal commitment. How can you start? First, recognize that you are embarking on a journey that will likely have a number of phases to it. For more on how to start small, learn, and adapt over time, see our guide “[Your Philanthropic Journey](#).”

At each stage, you will want to identify what you’re expecting to happen as a result of your philanthropy. What exactly is your role in this change? With a stake in the ground, it’s easier to identify whether you hit the bar you set. If you did, great; if not, ask, why not? What can I do differently next time? For more on the process on continuous improvement in philanthropy, read “[Am I Getting Better?](#)”

Finally, though the decisions you made at the outset about structure, family, and legacy were important to ground the first stages of your new approach to philanthropy, they need not be set in stone. Reflect on the questions you asked when you first got started. Has this exercise changed the way you think about involving your family? Will your initial structure be sufficient to accomplish all of your goals? And are your initial assumptions about giving while living or giving in perpetuity still valid after going through this process? Consult your compass, and take a moment to decide whether there’s an opportunity to refine these initial decisions.

Donor Values and Beliefs: Sample Statements

Mission or Core Values	Donor Intent or Guiding Principles
The William and Flora Hewlett Foundation	
<p>To promote the well-being of humanity by focusing on the most serious problems facing society, where risk capital, responsibly invested, may make a difference over time, and on sustaining and improving institutions that make positive contributions to society.</p>	<p>The Hewlett Foundation is concerned primarily with solving social and environmental problems. This requires that staff defines program objectives, grants, and other activities in terms of problems to be solved; identifies indicators of progress and criteria for evaluating success; and that the foundation is prepared to stay the course.</p> <p>The solutions to serious problems are seldom known with anything close to certainty. The foundation must therefore be prepared to experiment and take risks in its philanthropic activities. This, too, entails clear objectives and measures of success, without which staff cannot know how the risk eventuated. It also requires a willingness to acknowledge and learn from failures.</p> <p>Grantee institutions—nonprofit organizations and, in some cases, government entities—are essential partners in achieving the foundation’s mission. This explains the high proportion of the foundation’s grants budget allocated to general operating support. It also implies a concern not only for the health of individual organizations, but also for the fields in which they operate.</p>

Mission or Core Values	Donor Intent or Guiding Principles
The James Irvine Foundation	
<p>The Irvine Foundation is dedicated to expanding opportunity for the people of California to participate in a vibrant, successful and inclusive society.</p>	<p>The guiding principle in all the foundation’s activities is the idea of expanding opportunity, whether by helping youth navigate critical transitions in their lives, by fostering creativity and nurturing a rich cultural environment, or by improving decision making on critical issues facing California today and into the future.</p> <p>Four core principles guide Irvine’s grantmaking activities:</p> <ul style="list-style-type: none"> • Focus on place • Invest in organizations • Build leadership • Engage beyond grants
The John D. and Catherine T. MacArthur Foundation	
<p>The MacArthur Foundation supports creative people and effective institutions committed to building a more just, verdant, and peaceful world.</p>	<p>Beliefs: (i) humankind can improve, (ii) there is a universal set of human rights, (iii) an independent and strong civil society is essential, (iv) societies are at their best when individuals are well-educated, trained, and supported by government, (v) people and nations should work together, (vi) more developed nations have a responsibility, and (vii) every generation has a stewardship responsibility.</p> <p>How it works: (i) embracing complexity, (ii) being willing to take risks, (iii) supporting creativity, (iv) taking the long view, (v) creating and strengthening institutions, (vi) being optimistic, (vii) promoting diversity of viewpoint, (viii) being a convener, catalyst, and enabler, and (ix) exhibiting fairness and transparency.</p>

Source: Foundation websites, 2011

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.

Giving Checklist

This Giving Checklist is a set of the tasks to consider tackling when ramping up your philanthropic giving. Despite the linear format of the checklist, the path you will take to getting more serious about your philanthropy is an individual—and often highly iterative—process. Choose which tasks make sense for your philanthropic journey. (You may decide to add more tasks later, or even re-do tasks when you are at a different stage of your journey.)

It will be helpful to know which legal giving structure(s) you have decided to use for your giving, as this decision will have implications for some of these tasks. (Read our [FAQ on legal structures](#) if you would like more guidance in this area.) You will also want to think through if and how you are seeking to involve your family in your philanthropy. (You may find the information [here](#) on family and philanthropy helpful.)

Tasks	Will I need to do this?	Will I do this myself?
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What are my values and beliefs?

Define and codify your values and beliefs		
Think through your values and beliefs.		
Write down these values and beliefs, likely in the form of a mission statement or statement of donor intent .		
Establish areas of strategic interest.		
Decide, in broad brushstrokes, what portion of your philanthropy will focus explicitly on results.		
Think about the changes you envision resulting from your philanthropy.		
Decide whether to spend all your resources while living or give beyond your lifetime .		

Tasks	Will I need to do this?	Will I do this myself?
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What is success and how can it be achieved?
 What am I accountable for?

Define the issues

Define what “success” is for your philanthropy.		
Identify what needs to happen so your goal(s) can be met.		
Clarify the assumptions on which your strategy rests, including scouring other work in your field of interest.		
Identify barriers to achieving your desired success.		
Develop an investment model that directs your resources to achieving your desired success.		
Look into the work other funders are doing that may complement your own.		

Test the approach

Pilot your investments in small ways.		
Set target milestones for these pilot investments.		
Assess what actually happened vs. what you thought would occur.		
Explore the risks and opportunities for your strategy, now that you’ve tested it.		

Act and refine

“Swing for the fences” and consider how your results change your approach.		
Consider communicating changes in your strategy to others.		

Tasks	Will I need to do this?	Will I do this myself?
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What will it take to get the job done?

Establish a governance structure		
Develop and regularly revisit bylaws and policies.		
Define desired role of the board.		
Decide on a leadership structure—including committee roles—for your board.		
Recruit members for the board of directors.		
Secure advice		
Get the right people, in the right roles, to help you pursue your strategy. (This may be through unpaid advisors, or paid consultants, contractors, or staff members.)		
Ensure that staff, trustees, and volunteers understand their roles and decision-making responsibilities.		
Comply with tax and legal regulations.		
Understand tax implications.		
Access regulatory and legal support.		
Conduct ongoing compliance reporting.		
Coordinate the board of directors.		
Manage finances and investments		
Determine your asset management strategy.		
Set up IT and HR systems.		
Deliver funding to your chosen grantees.		
Perform financial management and reporting.		

Tasks	Will I need to do this?	Will I do this myself?
Communicate externally		
Outline your public philanthropic message.		
Decide on stakeholders with whom to communicate.		
Define key elements of your philanthropic brand.		
Conduct public relations.		

How do I work with grantees?

Select and invest in grantees		
Source organizations to find a set that you might want to support.		
Screen organizations —through research and due diligence—to determine fit with your strategy.		
Structure investments ; determine amount, time, and mechanism.		
Select organizations for funding.		
Support grantees by providing access to strategic or technical support.		
Sustain grantee relationships , evaluating continued fit with your goals.		
When necessary, end relationships with grantees as thoughtfully as you began them.		

Tasks	Will I need to do this?	Will I do this myself?
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Am I getting better?

Monitor your own performance as a grantmaker

Determine how you can most effectively track your progress (including, for example, gathering anonymous feedback from grantees).		
Establish the baseline (how you are doing today) and appropriate goals.		
Collect data.		
Use data to assess progress toward goals and identify improvements to your approach.		
Implement improvements.		
As appropriate, communicate results and improvements to grantees and others who supplied data.		

Monitor grantee performance

Work with grantees to understand what they will hold themselves accountable for achieving and how.		
Understand how grantees measure their progress, what metrics they use, and what they will report to you.		
Consider ways to support grantees in data collection.		
As grantees collect data, ask them to share implications: Which changes will they make as a result?		
As grantees' programs evolve, discuss when external evaluations would be of most value to them.		

Other tasks

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