



Philanthropy
Fund

Crafting Your Charitable Mission Statement

An Overview for Donors

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Crafting your Charitable Mission Statement: An Overview for Donors

Introduction

“If you don't know where you're going, you might not get there.”

Yogi Berra

When donors start along their philanthropic journeys, one question that often arises is whether it is important to craft a mission statement; and if so, how best to do so. As with any journey, knowing your destination – or in this case, articulating your goals for your philanthropy by crafting a mission statement – can be an invaluable first step. This publication is designed to help you think through seven key questions related to developing a charitable mission statement.

1. Why should I consider crafting a charitable mission statement?

“Developing your charitable mission statement gives you an authentic voice to the change you want to see in the world and how you intend to achieve it.”

Tracy Mack Parker, Chief Executive Officer
The Philanthropy Workshop

There are many good reasons to craft a charitable mission statement for your philanthropic endeavors. These include focusing your philanthropy, defining what you will and will not fund through your philanthropy, and ensuring that your family members understand and are engaged (if desired) in your philanthropic activities. We will discuss each of these reasons in turn.

Focusing your philanthropy

No matter how significant your philanthropic resources, you cannot fund everything. The more focused your giving the more likely you are to achieve your philanthropic goals. Crafting a charitable mission statement is one way to bring a deliberate, thoughtful perspective to your philanthropy, impose self-discipline on your giving, and help clarify your goals and intended impact. Russ Hall, Managing Director of Legacy Venture, an investment firm whose members (i.e., limited partner investors) donate all distributions to the causes of their individual choice, urges individual donors to take the time to develop a charitable mission statement, saying, “There is so much hurt out there in the world. Your mission will help you size what you're doing and the resources you have in a way that's going to be meaningful.”

Defining what you will and won't fund through your philanthropy

Another benefit of crafting a charitable mission statement is that it will signal to interested grant applicants what you will and will not fund. This is a win/win proposition for both you and nonprofit organizations. The nonprofits will save valuable time by not applying for grants that you are not likely to fund,

and you will save time by not processing their grant applications and rejection letters. Also, at a very practical level, referencing your charitable mission statement will give you a gracious way to decline support for nonprofit activities that are not part of your giving program.

Creating a starting point for talking with your family

A third reason to craft a charitable mission statement is to facilitate your family's understanding of and involvement in your philanthropy. If you are interested in engaging your family members, their participation in developing a mission statement for your collective philanthropic efforts can educate them of your wishes, help you learn about their priorities, and articulate a shared vision and values. For more information on how to think about families and philanthropy, please see the Goldman Sachs Philanthropy Fund ("GSPF") publication "Families and Philanthropy."

Even if you are not interested in partnering with your family in your philanthropy, crafting a mission statement can provide a starting point for talking with your family members about your hopes and intentions for your philanthropy in the long-term. Jeffrey Cain, author of *Protecting Donor Intent*, states that "a well thought-out and well-written mission statement is absolutely essential for sustaining successor education, grantmaking vitality, quality control, and productive collaboration and continuity of vision among future trustees and family members." He argues that your charitable mission statement is "vital to maintaining your intentions."

Melissa Berman, President and CEO of Rockefeller Philanthropy Advisors, notes there are a couple situations when it may not make sense to develop a charitable mission statement. Berman explains: "If your resources are not significant, or if you have already made a set of really clear decisions and are very focused, then I don't know if you need a charitable mission statement." While some philanthropy experts argue that all donors should develop a charitable mission statement, all the experts interviewed for this publication agree that developing a solid charitable mission statement can be very time-consuming. Donors should therefore consider the cost-benefit ratio of crafting a charitable mission statement in light of their individual situations.

2. What is a charitable mission statement?

"A good charitable mission statement for giving sets out the long-term impact the donor is trying to have. In many ways it answers the classic questions of journalism: who, what, when, where, why?"

Melissa Berman, President & CEO,
Rockefeller Philanthropy Advisors

Overall, a charitable mission statement is a simple summary of what you want to achieve through your philanthropy. It will drive all the resources you want to invest through your philanthropy, whether human or financial capital. The following are several useful descriptions and definitions of a charitable mission statement:

- "A mission statement is often a broad statement of purpose and/or may define the kinds of gifts you want to make...in what is usually a few brief lines."¹
- "A mission statement is a declaration of your intent. It describes what outcomes you'd like to see from your giving."²
- "An effective mission statement is concise, to the point, realistic, operational, inspirational, motivational, informative, and even emotional. It is not too abstract or even too intellectual."³

According to Emil Angelica, author of *Crafting Effective Mission & Vision Statements*, "a good mission statement is a short, snappy statement of the purpose of the organization, capable of fitting at the bottom of the organization's letterhead or business card...it should answer the question 'What good, for whom?'" Angelica goes on to explain how the mission statement must possess four important qualities:

1. Breadth – it should encompass all of the organization's activities
2. Durability – it should be long-lasting and able to set the organization's direction for the next twenty years

¹ Personal Legacy Advisors and The Philanthropic Initiative. "A 5 Step Guide for Creating an Expression of Donor Intent." <http://bit.ly/1ZxR4PD>.

² Phone communication with Henry Berman, CEO, Exponent Philanthropy, 3/14/14.

³ BoardSource. "The Mission Statement." 2013.

3. Challenge – it should continually challenge and guide the work of the organization
4. Distinction – it should distinguish your organization’s activities from that of other similar organizations⁴

In addition to these definitions and descriptions above, it may be helpful to understand how a charitable mission statement differs from two other documents donors often develop: a vision statement and a statement of donor intent.

A mission statement is not the same as a vision statement

According to experts at The Philanthropic Initiative, a philanthropy advisory firm, “A vision statement is an image of the mission accomplished; a picture of the ideal future state.”⁵ A vision statement operates at the very highest level and describes where you will be if your mission is completed. Henry Berman, CEO of Exponent Philanthropy (formerly the Association of Small Foundations) explains this concept further: “A vision statement is not necessarily unique. It could say something like ‘We envision a world free from cancer.’ In contrast, the mission statement describes your purpose, what you are going to do to make that vision a reality.” For example, with the same vision statement stated above, one mission statement could involve surgical approaches to eradicating cancer, another mission could encourage the use of Eastern medicine to combat cancer, and yet another mission statement could focus on advocacy for greater funding for cancer research.

A mission statement is not the same as a statement of donor intent

According to The Philanthropic Initiative, a statement of donor intent is “a non-binding letter or 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 that can be used to guide successors.”⁶ In contrast, “the charitable mission statement is not a legally binding document unless it is incorporated into a trust document,” says Melissa Berman. In fact, according to Cain, “a well-defined mission is not among the minimum

legal requirements necessary to obtain IRS-approval [for a foundation].”⁷

Ultimately, according to Dr. Lise Anne Slatten, a professor of Management at the University of Louisiana at Lafayette, a high-quality charitable mission statement “provides all stakeholders involved with information to inspire and direct their work so it’s meaningful and clear.”⁸

⁴ Angelica, Emil. *The Fieldstone Alliance Nonprofit Guide to Crafting Effective Mission & Vision Statements*. Saint Paul Minnesota: Fieldstone Alliance. 2001. pp. 5-6.

⁵ The Philanthropic Initiative. “A Workbook for Family Philanthropy.” p. 14.

⁶ Ellsworth and Turnbull.

⁷ Cain, Jeffrey J. “Protecting Donor Intent: How to Define and Safeguard Your Philanthropic Principles. Chapter 3: Defining Your Mission.” *The Philanthropy Roundtable*.

⁸ Telephone communication 4/12/14.

3. What questions should I explore before I start drafting my charitable mission statement?

“There is a lot you need to think about before you write a mission statement such as your motivations for being philanthropic, your values, and your boundaries on money and time for your philanthropy.”

Russ Hall, Managing Director,
Legacy Venture

Before you begin drafting your charitable mission statement, it is important that you articulate your values, and clarify how you want to be involved in your philanthropy. We discuss each of these points below.

What are your values?

Before you begin drafting a charitable mission statement, it is essential that you are clear about the deeply held values and beliefs you have about the world. “Your values and fundamental beliefs should be the overarching rationale for not only what you support but the way you support it and the way you think about what success means” says Melissa Berman. For example, if you are a strong believer that having access to the free enterprise system is what’s going to change people’s lives, you need to communicate that so it is clear you are looking for programs that connect people to income and economic opportunity. On the other hand, if you are a strong believer that art is a wonderful expression of the human spirit, you will be less likely to fund programs that emphasize the economic benefits of having a vibrant art scene in a community. For further detail on how to explore your values in philanthropy, please reference the Goldman Sachs Philanthropy Fund publication “Getting Started with Your Philanthropy.”

How do you want to get started with your philanthropy?

In order to best describe the mission for your giving, you will benefit from thinking through the seven key questions that every philanthropist should endeavor to answer. “Getting Started with Your Philanthropy,” noted above, covers each of these in greater detail, including:

1. **Why do you want to give?** – “What are your values and beliefs about yourself, the world and the way in which positive change happens?”
2. **When do you want to give?** – “When do you want to give away your resources?”
3. **Where do you want to give?** – “What people, problems, places, pathways, philosophies are you passionate about?”
4. **What do you want to give?** – “Do you want to give your money, investments, time, talent, networks?”
5. **Who do you want to give with (alongside you)?** – “Do you want to give alone, or with family/children, family office, community foundations, peer philanthropists, philanthropic advisors, foundation staff?”
6. **How do you want to give?** – “Do you want to give anonymously or publicly? For the short-term or long-term? Do you want to give restricted, unrestricted, or capital grants?”
7. **Do you want to know how successful you are in giving?** – “How important is it for you to know whether your grants are achieving your intended results?” For even more information on this last point, please reference the GSPF publication “Measuring the Results of Your Philanthropy.”

Overall, Ellen Remmer, Senior Partner with The Philanthropic Initiative recommends donors “start by defining your values, then writing your vision statement, then crafting your mission statement.”

4. How do I create a charitable mission statement?

“To answer this question, ask what is deeply important to you. What problems or opportunities in your community or in society do you care about? What do you want to change? What positive things do you want to grow or nurture? Another good question is: What has made a significant impact in your life?”

Exponent Philanthropy,
Frequently Asked Questions

Once you have articulated your values and clarified how you want to be involved in your philanthropy, you can begin the process of crafting your charitable mission statement. Experts suggest a variety of different approaches to writing a mission statement including:

- Research information on your own – learn about problems, needs and opportunities by walking or driving around your community and meeting with people in your community
- Find a trusted friend or family member to “interview” you about what is meaningful to you and what you want to accomplish through your philanthropy
- Engage a professional life coach or philanthropic advisor to guide your process – this can be particularly helpful when multiple family members are involved – an objective, outside expert can facilitate understanding and consensus in these situations

Regardless of your approach, experts offer the following advice for donors as you craft your mission statements:

Keep it short and simple

In his article, “The Eight-Word Mission Statement: Don’t Settle for More,” Kevin Starr, Managing Director of the Mulago Foundation recommends expressing a mission statement in eight words. “A verb, a target population, and an outcome that implies something to measure – and we want it in eight words or less. It’s long enough to be specific and short enough to force clarity.” Starr believes a good mission statement is about the what, not the how, and that a mission statement limited to eight words can be a crucial tool for funding decisions.

He offers the following succinct examples:

- Save kids’ lives in Uganda
- Rehabilitate coral reefs in the Western Pacific
- Prevent maternal-child transmission of HIV in Africa
- Get Zambian farmers out of poverty⁹

All mission statements do not have to be eight-words long, however, most experts agree that effective mission statements should be easy for you to memorize and for others to understand and ideally no more than two or three sentences long. Slatten notes the beauty of the eight-word mission statement is that even if it’s not the final statement, it’s at least a starting point for communicating what you care about. And, she adds, “It’s so much easier than communicating three paragraphs. You can put it on a business card, a website, a t-shirt.”

Use clear language

From a very practical perspective, in addition to being succinct, your mission statement should be easy to understand. Peter Drucker, author of many books on management, noted that “One of our most common mistakes is to make the mission statement into a kind of hero sandwich of good intentions. It has to be simple and clear.”¹⁰ In his video blog entitled “How to Write a Mission Statement...” Dan Heath, co-author of *Made to Stick, Why Some Ideas Survive While Others Die*, explains how “There’s this cycle of making words more ambiguous and more fancy until all of the meaning leaches out.” He tells a fictitious and funny story about a pizza parlor that starts with the clear and inspiring mission statement: “Our mission is to serve the tastiest...pizza in Wake County.” However, after multiple wordsmithing iterations with input from friends and colleagues, the final mission statement ends up reading: “Our mission is to present with integrity the highest quality entertainment solutions to families.” The language clearly obscures the actual mission of the pizza parlor, and Heath argues this often happens with other organizations. He suggests two solutions: 1. Use concrete language; and 2. Talk about the Why.¹¹

Don’t be too restrictive or too broad

⁹ Starr, Kevin. “The Eight-Word Mission Statement: Don’t Settle for More.” *Stanford Social Innovation Review*. <http://bit.ly/1UA6Ghh>. September 18, 2012.

¹⁰ Drucker, Peter F. *Managing the Nonprofit Organization: Principles and Practices*. Chapter 1. The Commitment.” New York: HarperCollins Publishers. 1990.

¹¹ Heath, Dan. “How to Write a Mission Statement...” <http://bit.ly/1Y93kHt>.

Several experts warn donors not to make their mission statements too restrictive or too broad. If too restrictive, the mission statement may cut off opportunities for you to achieve your philanthropic goals in ways you did not foresee at the time. For example, if donors say they want to help children access more pre-K education by supporting quality pre-K programming, this may limit their funding options if they find out that adequate nutrition is the key barrier to children accessing pre-K education. Too much specificity, (e.g., “My mission is to support third grade children in after school programs through books on American history”), can be unnecessarily constricting. On the other hand, as Melissa Berman states, “If your charitable mission statement is so broad that almost anything can be covered then you really haven’t helped yourself at all.” A mission statement should give you guidance, direction, and keep you focused. It should not be so broad as to be useless (e.g., “I support charitable causes”).

Take time to get it right

Crafting a high quality charitable mission statement can be a lengthy process and it is essential to take the time to get it right. Hall warns donors against “rushing into it or expecting a fully formed mission statement to come into being like Athena springing from the mind of Zeus.” Most experts suggest writing multiple drafts over several weeks and sometimes several months, especially if family members are involved.

We should note that not all experts agree on this point. Susan Wolf Ditzkoff, Partner and Co-Head of the Philanthropy Practice at The Bridgespan Group, a nonprofit advisor and resource for mission-driven organizations and philanthropists, suggests that “rather than spend a lot of time on developing a mission statement, just go out there and try things. And then write and revise your mission statement based on your experiences and an iterative process.”

The following are some examples The Philanthropic Initiative¹² highlights as good charitable mission statements:

- My primary interest is to promote approaches to homelessness in my home state that brings about long-term solutions. I view my philanthropy as social venture capital and subject my funding to the same rigorous analysis that I would apply to any serious investment decision.
- I want to maintain, restore and enhance the natural environment and support programs that will sustain a healthy planet for my grandchildren and great-grandchildren.
- The mission of my giving is to reduce youth and female poverty by helping disadvantaged adolescent and pre-adolescent girls take charge of their own lives.
- By choice and tradition, I support three grant areas: education, the arts, and after school programs. I limit my funding to those subject areas and to my residential county to make more effective use of limited resources.
- We are very concerned about the impact of urban sprawl and other environmental consequences of population growth. Through our family philanthropy, we will seek to find new solutions to these problems and enable grassroots groups to exert their voice and influence.

¹² The Philanthropic Initiative, “Passion: Discovering the Meaning in Your Philanthropy. Writing a Mission Statement. 2013; and The Philanthropic Initiative. “A Workbook for Family Philanthropy.” 2008.

5. How can I test my draft charitable mission statement to see if it “works”?

“The ultimate test is not the beauty of the mission statement. The ultimate test is right action.”

Peter Drucker,
“Managing the Nonprofit Organization”

Drucker wrote: “A mission statement has to be operational, otherwise it’s just good intentions. A mission statement has to focus on what the institution really tries to do and then do it so that everybody in the organization can say: This is my contribution to the goal.” Once you have drafted your charitable mission statement, you should test it to see if it accomplishes the purposes laid out at the beginning of this publication. In particular, you should assess whether the charitable mission statement reflects your values, focuses your philanthropy, and defines what you will and will not fund through your philanthropy.

The experts interviewed for this publication suggest a variety of different approaches to testing your charitable mission statement:

- Melissa Berman believes a great way to test your charitable mission statement is to have a kitchen cabinet or inner circle to test your ideas on...people who will be comfortable saying ‘I admire what you’re doing but I don’t understand what you just said.’
- Henry Berman recommends you do a dry run. Tell yourself you have \$X or 100% of dollars to give away, and ask yourself ‘What are the gifts I would make now?’ Are they consistent with what I’ve written here in my mission statement?
- Russ Hall advises asking yourself: “Does it narrow my grantmaking to be more efficient, more effective, and more manageable?”, “Does it improve my philanthropy?” and “Is my mission statement clear enough that it discourages the wrong kind of people from seeking funding and encourages the right kind of people?”
- Dr. Lise Anne Slatten suggests taking a period of time to think about it: “Put it up at home, look at it in the morning when you get up and see if it’s inspiring to you. Put it on your desk and see if when you come back after lunch and are tired if your mission statement motivates you to do your work. Then make a commitment to it after you’ve gone through this process.”

In a publication from Exponent Philanthropy¹³, the author Doug Malcolm recommends testing your mission statement by playing a game of “what if.” In this game, you and your family members and/or kitchen cabinet imagine you have \$1,000,000 to give away or invest in order to solve a community problem. Referencing your newly crafted mission statement, ask the following questions:

- What would I do?
- How? How much? Where? With whom?
- Over what time frame?
- What would be my personal involvement?
- What outcomes would I want to see happen?
- Would this grant/loan fire me and others up?

Malcolm adds that “if your mission statement offers relatively quick and decisive guidance to these and other questions, you have a valuable tool that will bear use.” If instead you find that following your mission is difficult, then perhaps it needs tweaking. Cain suggests putting yourself in the shoes of a reader who has never met you. Ask yourself: “Would this person understand what you were hoping to accomplish? Would he or she have a clear picture of what motivated you? Would he or she have a good sense of the kinds of things you would want to support?” Ultimately, the true measure of whether your charitable mission statement “works” is whether it makes clear what you will and won’t fund.

¹³ Malcolm, Doug. “The Mission Statement: Finding Common Ground.” Exponent Philanthropy. Members Only Section.

6. How do I develop grant guidelines that are consistent with my charitable mission statement?

“What you need to do is be as clear as you can be. Describe what you will fund and what you won’t fund so people will know whether their organization fits with your charitable mission.”

Henry Berman, Chief Executive Officer,
Exponent Philanthropy

Once you have finished crafting your charitable mission statement, it can be helpful to develop grant guidelines to provide more details for grantseekers regarding how and what you will and will not fund. Melissa Berman suggests that “grant guidelines help you sort through what is connected to your issue area but not really at the center of your bull’s eye for how you want to achieve results from your giving...If you are really committed to assessing the results of your giving, grant guidelines are essential because they lay out how progress is going to be assessed.”

Once you have drafted the guidelines, Henry Berman suggests you approach friends who work at nonprofit organizations to fill out the grant application as if they are going to ask you for money. He recommends that you ask your nonprofit professional friends for feedback on the guidelines, ascertain from them what is clear and unclear, and how the guidelines can be improved.

According to the Frequently Asked Questions section on the Exponent Philanthropy website¹⁴, clear grantmaking guidelines should answer grant seekers’ top questions:

- Do you fund the area in which I work?
- Do you offer the kind of support that will help me?
- How do I apply, and when?
What information should I include in my letter of inquiry, or proposal?
- What is most important to you in making funding decisions?

- When will I hear back from you?

The guidelines themselves should include items such as:

- The areas you are interested in funding – education, the environment, the arts, etc.
- Your geographic focus, if any – city, state, region, country
- The types of grants you will make – general operating grants, program grants, capital grants, matching grants, etc.
- Non-financial supports you will provide – technical support, networking, fundraising, etc.
- The types of organizations you will and won’t support
- Whether you only fund pre-selected organizations or will consider unsolicited proposals
- A list of the restrictions on giving – e.g. grants for competitions or events, grants to individuals, etc.
- Application procedures – including timing for their submission and your response
- Grant reporting requirements – including any information grantees must submit during and at the end of its funding cycle

The Philanthropic Initiative has developed a couple helpful templates for donors to use in developing grant guidelines and these references can be found in the recommended resources section at the end of this publication.

¹⁴<http://bit.ly/22PiXEB>.

7. How often should I reassess my charitable mission statement and grant guidelines?

“Mission and guidelines are not engraved in stone...periodically revisit them to make sure they are still aligned with [your] activities and aims.”

Virginia Peckham,
National Center for Family Philanthropy

Each successive version of your charitable mission statement should be a living, breathing part of how you approach your giving. According to BoardSource, a national organization focused exclusively on good governance practices for nonprofit board of directors, chief executives, and funders: “The mission statement should be referred to continuously. It should be reassessed on a regular basis and not forgotten in a binder...it should be present everywhere: on the letterhead, brochures, and official documents.”

Most of the experts interviewed for this publication recommend you review your mission statement and grant guidelines at least annually, although this doesn't mean you have to update them annually. Melissa Berman suggests you ask yourself: “Am I getting the results I'm hoping for? If not, is it because the problem is inherently long-term, or because the organizations I'm funding are not moving as quickly as I hoped, or is it because I'm not heading down the right path?’ If there are other areas where your philanthropy is making good progress, think about how to accelerate that.” Some experts recommend reviewing your mission statement more frequently if your giving cycle is shorter than a year or if you are attracting an unmanageable number of grants (indicating that perhaps your mission is too broad).

Your mission statement and grant guidelines should also be reviewed after significant events in your life. According to Peckham, some reasons why mission statements and/or guidelines might need to be revisited include:

- You have new family members whose interests are not reflected in the mission
- You and/or your family members no longer reside in the geographic areas indicated in your mission statement
- Your asset situation has changed
- You have hired staff to help manage your philanthropy
- New causes or issues emerge in your community and/or your interests fundamentally change
- Existing causes or issues are addressed by others or no longer need your attention

Conclusion

“Most mission statements are really long on statement and really short on mission. The whole point of this is to talk about why you’re doing what you do; you’ve got to talk about what makes you care.”

Dan Heath,
Made to Stick

There are many benefits to crafting your charitable mission statement and many different approaches you can employ to accomplish this task. This publication has been designed to help you contemplate how best to craft your charitable mission statement. A list of recommended resources for each of the seven questions is included at the end of this publication to help you explore each of these issues more deeply. For more information on this topic or additional assistance with philanthropic topics, contact your Goldman Sachs Private Wealth Advisor.

Recommended Resources

1. Why should I consider crafting a charitable mission statement?

- BoardSource. "The Mission Statement." 2013.
- Cain, Jeffrey J. "Protecting Donor Intent: How to Define and Safeguard Your Philanthropic Principles. Chapter 3: Defining Your Mission." The Philanthropy Roundtable. <http://bit.ly/1Odho0S>.
- The Philanthropy Roundtable. "Mission Possible." (excerpted from *Protecting Donor Intent* by Jeffrey J. Cain). <http://bit.ly/1t904jw>.
- *Creating a Starting Point for Talking with Your Family*
- Rockefeller Philanthropy Advisors. "Talking to Your Family About Philanthropy." www.rockpa.org. <http://bit.ly/25MfubU>.
- The Bridgespan Group. "How Do I Work with My Family to Achieve High-Impact Philanthropy?" www.bridgespangroup.org. <http://bit.ly/1VMm7YP>.
- The National Center for Family Philanthropy. "The Power to Produce Wonders: The Value of Family in Philanthropy." pp. 12-15. <http://bit.ly/1Sjr0W9>.
- The Philanthropic Initiative. "Giving Together: A Workbook for Family Philanthropy." 2008.
- Tuan Melinda. "Families and Philanthropy: An Overview for Donors." *Goldman Sachs Philanthropy Fund*. October, 2012. <http://bit.ly/1YaKPCC>.

2. What is a charitable mission statement?

- Angelica, Emil. *The Fieldstone Alliance Nonprofit Guide to Crafting Effective Mission & Vision Statements*. Saint Paul Minnesota: Fieldstone Alliance. 2001. pp. 5-10.
- Drucker, Peter F. *Managing the Nonprofit Organization: Principles and Practices. Chapter 1. The Commitment.* New York: HarperCollins Publishers. 1990. pp. 3-8.
- Personal Legacy Advisors and The Philanthropic Initiative. "A 5 Step Guide for Creating an Expression of Donor Intent." October, 2009. <http://bit.ly/1ZxR4PD>.

3. What questions should I explore before I start drafting my charitable mission statement?

What are your values?

- Rockefeller Philanthropy Advisors. "The Giving Commitment: Knowing Your Motivation." www.rockpa.org. <http://bit.ly/1UC5Twe>.
- The Bridgespan Group. "Clarifying Your Aspirations." www.bridgespan.org. <http://bit.ly/1WFLSek>.
- The Philanthropic Initiative. "Passion: Discovering the Meaning in Your Philanthropy: Exercises and Reflections. Thinking About Your Values." 2011. pp. 15-16.
- Bronfman, Charles & Jeffrey Solomon. *The Art of Giving: Where the Soul Meets a Business Plan*. San Francisco: Jossey-Bass. 2012. pp. 46-47
- 21/64 motivational value cards - <http://bit.ly/1VNEU61>.

How do you want to get started with your philanthropy?

- The Bridgespan Group. "Finding Your Philanthropy Compass." www.bridgespan.org. <http://bit.ly/22SFhNG>.
- Rockefeller Philanthropy Advisors. "Your Philanthropy Roadmap." www.rockpa.org. <http://bit.ly/1U8ijyA>.
- Tuan Melinda. "Getting Started With Your Philanthropy: An Overview for Donors." *Goldman Sachs Philanthropy Fund*. July, 2012. <http://bit.ly/1UheLeP>.

4. How do I create a charitable mission statement?

Publicly available documents

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Philanthropic Advisors and Other Resources

- **Arabella Advisors** – www.arabellaadvisors.com – Arabella helps foundations, families, investors, and corporate clients achieve greater good with their resources. Arabella offers a comprehensive suite of philanthropy services including: planning and strategy development, outsourced foundation management and philanthropy support, family engagement, and support for impact investing. Arabella also offers platforms to support and host donor collaboration, new initiatives, and policy advocacy.
- **The Bridgespan Group** – www.bridgespan.org – Bridgespan is a nonprofit advisor and resource for mission-driven organizations and philanthropists. Bridgespan works with individuals, families and foundations as they align their values and beliefs to maximize the results of their giving. Bridgespan generally engages with individuals and families as they are about to embark on or revise a significant philanthropic investment.
- **Exponent Philanthropy** – www.exponentphilanthropy.org – A vibrant membership organization providing resources and valuable connections that help funders make the most of the minutes they have and the dollars they give. Exponent Philanthropy members choose to give big while staying small, working with few or no staff to make the most of their resources. Its network comprises thousands of philanthropists who use a variety of giving vehicles including donor-advised funds, foundations, giving circles, and more.
- **Rockefeller Philanthropy Advisors (RPA)** – www.rockpa.org – A nonprofit organization that helps donors create thoughtful and effective philanthropy throughout the world, RPA currently serves more than 150 donors in facilitating over \$200 million in annual gifts and grants to more than two dozen countries. RPA provides research and strategic planning, develops philanthropy programs, provides complete grantmaking management services, serves as a fiscal sponsor for philanthropic initiatives, and communicates widely about philanthropy.
- **Sterling Foundation Management** – www.sterlingfoundations.com – A for-profit company that works with individuals and families to help them define, focus and maximize the impact of their philanthropy by offering thought leadership, sophisticated consulting and foundation management expertise.

- **The Philanthropic Initiative** – www.tpi.org – The Philanthropic Initiative (TPI) helps companies, foundations, families, and individuals increase the impact of their philanthropy. Working locally, nationally and around the globe, TPI partners with clients to create, implement, and assess customized philanthropic strategies. Since 1989, TPI has directed more than one billion philanthropic dollars and influenced billions more on behalf of its clients.

5. How can I test my draft charitable mission statement to see if it “works”?

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6. How do I develop grant guidelines that are consistent with my charitable mission statement?

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7. How often should I reassess my charitable mission statement and grant guidelines?

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