

Place for Passion in

Philanthropy



Act boldly. Give wisely.

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# The Philanthropic Initiative

The Philanthropic Initiative (TPI) is a nonprofit philanthropic consulting practice that helps companies, foundations, families, and individuals find innovative ways to maximize the impact of their giving. Working around the globe, we partner with clients to create, implement, and evaluate customized philanthropic strategies. Since 1989, we've directed more than one billion philanthropic dollars and influenced billions more on behalf of our clients.

TPI is also committed to actively promoting and advancing strategic philanthropy. We conduct cutting-edge research and train individuals, organizations, and advisors in best practices. Through TPI's Center for Global Philanthropy, we partner with experts, government, and nonprofit leaders to build cultures and systems that embrace and support effective social investing. Our promotional work informs our advising work – to the benefit of our clients and the global philanthropic community.

TPI is a distinct operating unit of the Boston Foundation.

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# Overview

What is the place of passion in philanthropy? When it comes to giving and volunteering, we might think of passion as that mix of curiosity, enthusiasm and conviction which takes us beyond an annual contribution into a sustained engagement with an issue, cause or organization. The passion in philanthropy can be expressed in many ways.

We all know people who approach everything in their lives with great verve and intensity. There are other people who lead with their intellect and whose life choices are the result of careful thought and preparation, but who are steadfast once decisions and commitments are made. Both types of people are capable of bringing passion to their philanthropy. In reality, most of us fall into neither category, but are always balancing the demands of our heads and hearts. In fact, the best kind of philanthropist is one who is engaged on both the intellectual and emotional levels.

This primer is intended to help you reflect upon your strongest and deepest feelings about what you want to accomplish with your giving, and how this connects to your satisfaction as a philanthropist. The story and examples that follow are composites that illustrate how individuals have identified their philanthropic passions.

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# The Passion in Philanthropy

We might think of passion as the emotional motivation for a donor's giving and the wellspring that helps sustain philanthropy over time. While difficult to define or quantify, passion is that powerful feeling for an issue, cause or organization that commands your interest and fuels your desire to make a meaningful contribution.



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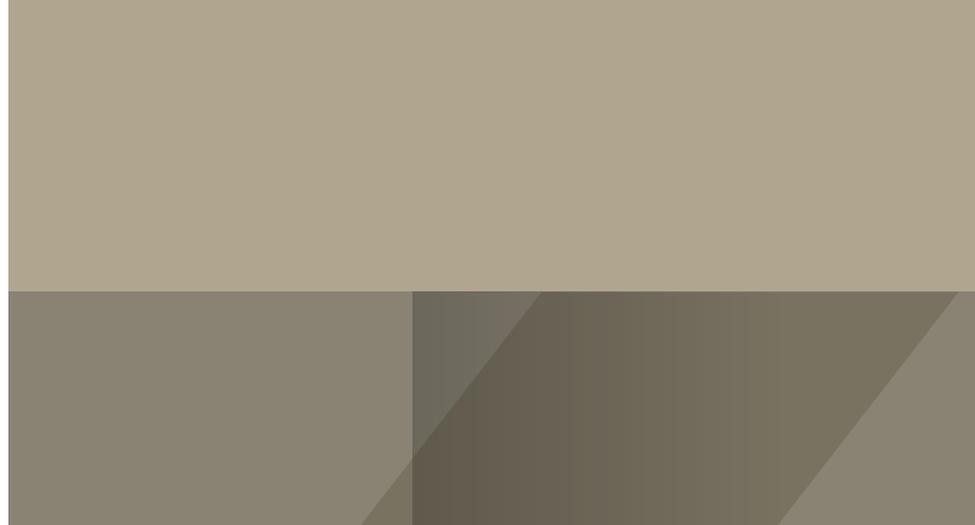
What does it mean to bring passion into philanthropy?

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There is no single or right way to discover your passion as a philanthropist. Each individual brings their own story to the giving process. For some people, it may be the compassion that results from a personal tragedy; for others, there may be a lifelong desire to make the world a better place. This passion may bubble up from curiosity and enthusiasm for a subject, or it may spring from a persistent concern about a social inequity, health issue, or environmental danger.

“The alignment of one's passion to one's giving is often elusive, but worth the search,” writes TPI Founder Peter Karoff. “The reward is that your gift giving becomes the best possible articulation of your core values and belief systems and at the same time becomes a direct link to those issues within community and society that you deem to be of greatest significance. The payoff is in the immense personal satisfaction that comes when your generosity is grounded in what you feel is the most important.”

Passion in philanthropy is about making a commitment to your most important beliefs and values. It is not about zealotry and does not need to exclude other interests from your charitable giving, but allows you to invest in a more fulfilling experience. Being committed to a cause or issue moves philanthropy away from the margins and towards the center of your life. Working with an issue regularly and understanding its complexities often will convert an intellectual interest into a deep, lifelong engagement.



David S. founded and ran a highly successful medical supply company for 25 years. At age 60, he decided to retire and turn to other pursuits. He was quite interested in philanthropy and had long planned to distribute his wealth to charity. However, he was unsure about how to get seriously started.

Because of his visibility in the community, David had been approached regularly over the years with requests for volunteer involvement and charitable contributions. He had graduated from a small, private college, and while he made substantial gifts to its annual fund, he had declined their request to lead the capital campaign; the idea of seeing his name on a building at an already thriving institution did not appeal to him. Several of his friends had become involved in the historical society, but this cause did little to spark his interest, although as a loyal friend he attended his friends' fund-raisers and contributed generously whenever asked.

Over the years, David had recognized his civic responsibility and had served as a trustee on a number of boards, including the parish committee of his church and the choral society in which his son and daughter sang. While he had fulfilled his obligations competently, he had never felt a close connection to these groups. When his children were young, he had joined them for family volunteering at the homeless shelter run by their church, and he had truly enjoyed serving meals, getting to know the clients, and becoming acquainted with other volunteers. However, once his children were older and less interested in volunteering as a family, he found his own interest waning as well. (To be continued)

## Why Should I Think about Passion in My Philanthropy?

In a survey of wealthy donors, TPI asked the question, “What factors would increase your interest in philanthropy?” “Finding a passion” was high on the list. Donors realize instinctively that having a passion helps them commit more completely to philanthropy, to give more of their time and money to increase their personal satisfaction and impact.



Nothing great was ever achieved without enthusiasm.

-Ralph Waldo Emerson

Maybe you have already been a donor to various charities. Like many people of means, you may feel that having a privileged position in society obliges you to “do your fair share.” That sense of responsibility may derive from your family upbringing, religious teachings, or simply the feeling that it’s important to “pay back” the society which made it possible to accumulate the wealth that you enjoy.

Perhaps friends and colleagues have approached you over the years to support their favorite causes. You respond with a contribution because of your loyalty to the friendship or business relationship, or because you know that they will respond in kind when you call. In both of these situations, your gifts honor your relationships and strengthen bonds within your community. For many people, this is the starting point of their philanthropic journey.

However, to make a significant impact in the world requires more than a feeling of responsibility or reciprocity. As Ralph Waldo Emerson said, “Nothing great was ever achieved without enthusiasm.” Moving causes and issues forward in society depends on that extra measure of individual dedication, intensity and fortitude. This kind of passion can support the donor in many ways, including the following:

### FUEL YOUR INITIATIVE

The energy and momentum to take on a challenge, and ultimately to provide leadership, requires the conviction that you are taking on an issue that is vitally important. With all the demands for our limited philanthropic dollars and time, it is likely that only the most deeply felt causes will stir your initiative.



## SURMOUNT ROADBLOCKS AND DISAPPOINTMENTS

In any philanthropic activity, there are times when results do not meet expectations. A program may fail because of inadequate funding, a change in legislation, or other unforeseen circumstances. In the face of these problems, commitment to the larger vision permits you to address the challenges and look for alternative and creative solutions. As Winston Churchill said, “Success is going from failure to failure without loss of enthusiasm.”

## DERIVE GREATER SATISFACTION

Whether it is the company you run, the hobby you enjoy, or the good you hope to accomplish with your philanthropy, there is no doubt that sustained, lively interest brings greater satisfaction at the end of the day.

## FEED YOUR PERSONAL GROWTH AND CREATIVITY

As you become intensely engaged in an issue or organization, you will notice how the experience contributes to your own growth. You may find yourself looking at the world through a different lens; for example, through the eyes of your philanthropic constituency. Your sustained commitment to the work also may provide the opportunity to build new skills, develop new associations, and stretch your imagination.

## INSPIRE OTHERS TO SUPPORT THE EFFORT

Your excitement about what you are trying to accomplish can be contagious. Sharing your vision also is the most powerful way to attract and retain partners who can provide needed expertise, resources and a broader community of support for your cause.

## HAVE A GREATER IMPACT ON AN ISSUE OR AREA

If your giving is very scattered, it will be more difficult to know whether your gifts are making a difference. The more focused and committed you are to an issue, the more likely it is that you will make a real difference.

# What is the Source of Philanthropic Passion?

The heart and soul of a donor can spring from any number of emotions, values, personal experiences, and aspirations. Some people are intense and visionary by nature while others are affected by a significant event, or are stirred more slowly over time. Among the most frequently cited reasons for personal involvement in giving are the following:



Philanthropists who come to their cause from personal experience often emerge as powerful leaders.

## A DREAM POWERS INSPIRATION AND IMAGINATION

A donor's interest can be sustained by the sheer excitement about what might be possible in the future. This "vision" can encompass just about anything – education, the arts, health care or animal rights. There is the donor who dreams of creating a new wing at the local museum to showcase emerging artists. There is the donor who supports community-based programs that promote racial harmony. And there is the donor who sees the promise and potential in funding basic research in the life sciences.

## FRUSTRATION OR ANGER FUELS A SENSE OF URGENCY

There are donors who are profoundly troubled by broad issues such as child poverty or environmental degradation, for example. Their desire to create change may be fueled by a sense of urgency about the future, e.g., how continued degradation of underground aquifers threatens the world water supply. There are philanthropists who feel strongly that the status quo has caused widespread social injustice; these donors have committed their efforts and financial resources to support systemic change on a regional or national level, but their interest is "close to home," as in deeply felt.

## COMPELLING EVIDENCE BUILDS TO ACTION

For those whose hearts are ruled primarily by their minds, the impetus toward engaged philanthropy may come only after learning the hard facts. For example, the donor who is interested in affordable housing who examines the available research and explores the underlying assumptions behind the data before committing himself to a long-range strategy. While donors such as this may place less emphasis on the emotional or sentimental aspects of giving, they often are very passionate in pursuing their philanthropic goals over the long term.



## AN INDIVIDUAL OR EVENT IS PROFOUNDLY MOVING

Many of us are spurred to action by reading about a person or organization, or because we have been moved by a major world event. The tragedy of September 11th motivated many people from all across the economic spectrum to donate well over one billion philanthropic dollars to New York charities and related international causes such as girls' education in Afghanistan.

## GRATITUDE CREATES THE URGE TO GIVE BACK

The desire to give back can be a powerful motivation. A donor who is the first in the family to attend college became a significant supporter of his alma mater because of the role that institution played in his success.

## A PERSONAL OR FAMILY EXPERIENCE HAS AN IMPACT

For many people, an involvement in philanthropy comes from a personal experience or from their relationship with someone whose life was dramatically changed. A family who lost its mother to breast cancer devotes itself to clinical research and treatment initiatives. Another donor became actively involved in teen drama programs after witnessing, as a parent and teacher, how young people develop their sense of self through the dramatic arts. Philanthropists who come to their cause from personal experience often emerge as powerful leaders and spokespersons because their involvement is so deeply rooted.

## A DESIRE TO HONOR A FAMILY MEMBER OR FRIEND BECOMES IMPORTANT

People are often motivated to make a meaningful contribution when they lose a beloved family member or an admired friend. This impulse may be especially strong when a young person dies or when the individual has been a strong influence in his or her community. One donor established the funding for a Latin American Studies program at a local university, in honor of his daughter who had taught in Latin America. For a man who had devoted his life to work with youth and community building, a group of friends and admirers set up an endowment to continue his work to support grassroots programs in perpetuity.

## What are the Obstacles to Finding the Passion in Philanthropy?

For many people, life is so hectic, scheduled and results-oriented that it can be a challenge to nurture the philanthropic impulse. In the daily routine of our lives, there is a tendency to become distant from the heart and soul of our giving. Some of the obstacles that donors may confront are listed below, along with some possible solutions for overcoming these obstacles:



In the daily routine we may become distant from the heart and soul of our giving.

### SKEPTICISM ABOUT WHAT CAN BE ACCOMPLISHED

You feel that your philanthropy is merely “a drop in the bucket” given the magnitude of society’s problems and the relative amount of funds that government and business can bring to the table. You are skeptical that private philanthropy can make much of a difference.

**Possible Solution** – Many donors choose a particular organization or issue where they can see concrete impact. It may be working with a single school to launch an after school program, or helping a local organization provide low-interest loans for small business development.

### DISTRUST OF NONPROFIT INSTITUTIONS

You may feel “handled” by fund-raisers who seem to be telling you only what you want to hear. Maybe you’ve become cynical about whether nonprofits are truly effective or accountable, and you question how much they spend on fund-raising, how well they use their resources, or how well they are managed.

**Possible Solution** – One solution to this problem is to research whether the organization is doing what it claims to do and whether it is managed well. There are resources on the Internet for evaluating the financial health of organizations such as [www.charitynavigator.org](http://www.charitynavigator.org). For assessing program efficacy, talk to other donors, grantees, and program constituents about their observations and experiences. You also may discover that, like some donors, you prefer to make gifts directly to individuals – for example, by funding scholarship programs.



## BEING IN A REACTIVE MODE

You may be so overloaded with funding requests that you simply respond to the requests of your family and friends. You find that you have limited time and energy to think about the issues and organizations that are of deep and lasting interest to you.

**Possible Solution** – Organizing requests into giving categories, such as “good citizen,” “social/relationship based,” and “focused interest” can be helpful in this case. If you create a giving budget and allocate specific amounts for each category, you can satisfy your obligations and still develop a focus for your giving and a greater sense of accomplishment. Determining focus areas can also make it easier to say “no” to requests that fall outside your personal guidelines.

## THE ISSUES SEEM TOO COMPLEX

You feel overwhelmed by the complexity of social problems and don’t know where to begin to make a difference. You want to learn more about an issue, but feel very distant from the cause and constituencies and don’t know how to get engaged.

**Possible Solution** – There are many ways to benefit from the support of others when you are learning about philanthropy and specific issues. The community foundation in your area may hold education programs for donors on issues of local importance. On a national level, you can attend conferences offered by the Council on Foundations or by various affinity groups that address specialized issue areas. You also may wish to investigate giving circles, which function almost as philanthropic investment clubs. These groups attract a variety of people involved with a diverse spectrum of issue areas, and through them you can learn more with other donors.

## What are the Obstacles to Finding the Passion in Philanthropy? *continued*

### CULTURAL AND BUSINESS BACKGROUND

You have been taught to restrain your emotions and enthusiasms in order to be successful in your business and social life.

**Possible Solution** – Being passionate about an issue or organization need not be inconsistent with your personal or professional style. Applying your intellect and understanding to an issue is of great value, both for you and the community of interest that you approach. It may take time to discover whether you want to make a fuller commitment, but intellectual engagement can help to create a closer connection.

### LACK OF TIME

You don't have the time or energy to engage deeply in a cause or organization because your schedule is already filled with work, family and social activities. For many people, this is the primary barrier to committed philanthropy.

**Possible Solution** – It is important to remember that not all your giving requires the same level of involvement; this is one of the benefits of focusing on a particular interest or organization. Also, you may find that combining your commitments actually creates new opportunities for philanthropy. For example, working with your family on philanthropy is a wonderful way to spend time together, deepen your collective connection to the outside world, and develop an intergenerational common ground.

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Sometimes it's just a question of choosing an opportunity, jumping in and seeing how it feels.

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## How Do I Find my Philanthropic Interests and Passion?

The path to discovering your passion often begins with an examination of your values. On page 13, is a series of activities and reflection exercises that provide a framework for articulating what you care about and what you may want to do. Sometimes, however, finding your passion is just a question of choosing an opportunity, jumping in, and seeing how it feels. Even if you have a good idea at hand, you may want to first “get your feet wet” to see if the issue is right for you.

### VISIT GOOD ORGANIZATIONS AND SEE THE WORK FOR YOURSELF

You can do this alone or with a friend, family member or staff person from a community foundation. Visits on the “front line” can educate and inspire you, along with giving you an overview of the organization or community. Most nonprofits are delighted to share their vision and spread the excitement that they get from their work.

### VOLUNTEER YOUR TIME

Volunteer to do a single activity for a few months for an organization that interests you. Connecting directly with a population and seeing the daily concerns of a program or cause will turn abstract ideas into pragmatic reality.

### CONTRIBUTE SKILLS AND TALENTS

Giving becomes more personal when you invest more of yourself in the process. Consider your skills and talents and how they match the needs of a particular nonprofit, whether it’s organizing a fund-raising event, negotiating a contract, or helping to build a strategic alliance. Your expertise will be of great value to the organization and will create an important link to your financial gift.

### JOIN WITH OTHERS

Bring your family into your philanthropy or join a “giving circle.” Sharing your interest with others increases your potential to learn, to overcome any feeling of isolation, and to be supported and inspired by the commitment of your peers.

### SERVE ON A BOARD OF DIRECTORS

Nonprofit organizations in every field are in need of committed and thoughtful board members. Board service can provide a more sophisticated understanding of an organization or issue and carries a responsibility and involvement that is very rewarding. In addition to what it can teach you, board service will bring you into contact with other people who are working and contributing in the field.

## Final Thoughts

Bringing passion to your giving may be elusive and, at times, hard to sustain. But if you can begin to reflect on what you care about most and pursue it with conviction, your giftgiving will likely become one of the most meaningful parts of your life, as the conclusion of David's story demonstrates:

One day, several years into his retirement, David and his wife, Margaret, received a phone call from the counselor at his younger son's college. Jonathan had completed a brilliant first year, doing well in his courses and getting involved in the orchestra and the tennis team. However, he was finding his sophomore year much more difficult. The counselor was calling to say that Jonathan had stopped attending classes and seemed to be suffering from severe depression. David was shocked and didn't know what to do. He was mystified by his son's illness, especially as Jonathan had made such a smooth transition from high school to college.

Although David and Margaret brought their son to several esteemed clinicians in the field, they were frustrated by the contradictory approaches to treatment. They also found that there was little research available on Jonathan's kind of depression, which manifested primarily during the college years. Even when their son began to respond to treatment and returned to school, David and Margaret couldn't stop thinking about their experience. The entire family had learned a painful lesson about the isolation that comes with mental illness.

The Tyners' story is just one example of a family approach to philanthropy. Any family can develop its own philanthropy program and craft the activities that will encourage a generous spirit in the next generation. Philanthropy, in all its many shapes and forms, is a wonderful way for parents to share their values with their children while making a meaningful contribution in the larger world.



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Whatever you can  
do, or dream you  
can, Begin it.  
Boldness has genius,  
power and magic  
in it.

-Goethe

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David decided to start a foundation that would support research and treatment for young people with mental illness. His own experience, albeit as a family of means, had made him keenly aware of the inequities in the system, and he became resolved to support research and treatment that would help the mentally ill regardless of their economic status.

His foundation focused on model programs that treated individuals while providing education and support systems for their families. He also endowed a research fellowship program and became involved in efforts to influence public policy on the issue. When, ten years later, David received an award from a national commission on mental illness, he was gratified by the recognition, but as he said in his acceptance speech, “There is still so much more to be done.”

David’s personal experience transformed his life and turned him toward philanthropy with a dedication and passion he could not have foreseen. The more he learned, the more he resolved to take a focused, long-term approach, which is what strategic giving is all about. David’s profound emotional connection to the issue drove his initial engagement, while increased knowledge and experience fueled his ongoing commitment and fortitude. This transformation is one of the most exciting and meaningful opportunities in the philanthropic journey.

## Exercise and Reflections

A keen awareness of your own interests and values is most often a prerequisite to developing a passion and vision for the future. Reflecting on these is a good start.

The first of these exercises will help you assess your current giving, highlighting places where you may want to make changes, whether in dollars, direction or time. The next two exercises will help you identify the values that are most important in your private life and in your community. From there you can begin to develop a vision of what you might accomplish. In the end, you may want to develop a mission statement that will help you stay focused in the work that you are doing and supporting.

### DISCOVERING WHAT YOU WANT TO GIVE

You may find it helpful to identify where your current giving activities correspond with your true interests. In the first column, Motivation, think about why you do each of the activities. Is it a sense of obligation, because a friend or family member has asked you, or because it is something you really care about? In the second, Satisfaction, determine on a scale of 1-5 how much pleasure each has given you, with 5 as the highest level. In the third, Comments, identify the reasons.

## Sample

	MOTIVATION	SATISFACTION (1-5)	COMMENTS
<b>AFFILIATIONS:</b>			
St. Johns Church	Family Religious Ed	4	Great when kids were young for family involvement
Country Club	Golf & swimming teams for kids	2	Not really connected with people
<b>DOLLAR GIFTS:</b>			
Alma mater	Give back - 1 had scholarship	4	
<b>TIME GIFTS:</b>			
Museum Board	Asked by George G.	1	Just asked to get me to give \$
Boys & Girls' Club Board	After school activity for kids	5	Now that kids are grown, I still feel it helps me to make a difference for other kids
<b>SKILL GIFTS:</b>			
Computer training for seniors		3	Organized poorly, sometimes time wasted

## Exercise and Reflections *continued*

### THINKING ABOUT YOUR VALUES

The following questions can serve as a catalyst for reflecting on your personal values and the relationship of those values to your charitable giving.

#### Formative Values and Influences

LIST 3-5 FORMATIVE EXPERIENCES IN YOUR LIFE. HOW DID THEY SHAPE YOUR CORE VALUES?

1.

2.

3.

4.

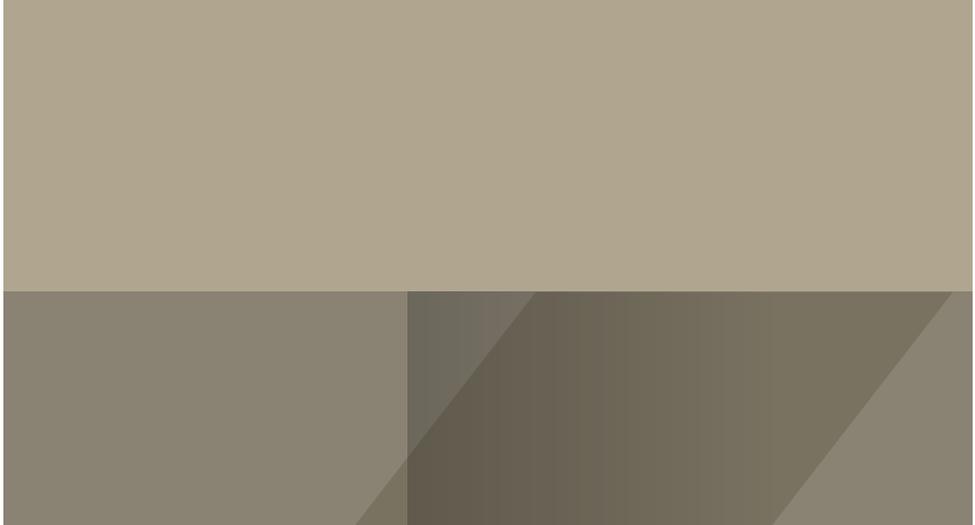
5.

LIST 3 PEOPLE (THEY COULD BE PEOPLE YOU KNOW OR HISTORIC FIGURES) WHO HAVE BEEN STRONG INFLUENCES ON YOU. WHAT VALUES DID THEY TRANSMIT TO YOU?

1.

2.

3.



## VALUES INVENTORY

Review the list of values below, adding any others you wish, and circle the five that are most important to you at this stage of your life.

Acceptance	Compassion	Freedom	Leadership	Privacy
Achievement	Conservation	Generosity	Love	Respect
Acknowledgement	Courage	Happiness	Loyalty	Responsibility
Adventure	Creativity	Harmony	Mastery	Security
Agility	Democracy	Health	Merit	Self-expression
Arts	Dignity	Honesty	Open Communication	Self-Reliance
Beauty	Diversity	Humility	Opportunity	Service
Change	Education	Innovation	Peace	Stability
Collaboration	Equality	Integrity	Personal Growth	Stewardship
Comfort	Expertise	Involvement	Preservation	Truth
Commitment	Fairness	Justice	Pride	Wise Use of Resources
Community	Flexibility	Knowledge		

HOW DO THE VALUES YOU CIRCLED SPEAK TO THE KIND OF GIVER YOU WANT TO BE?

DO THEY HAVE IMPLICATIONS FOR THE KINDS OF ORGANIZATIONS AND CAUSES THAT YOU SHOULD BE SUPPORTING?

## Exercise and Reflections *continued*

### DEVELOPING A VISION FOR YOUR PHILANTHROPY

Consider these questions toward developing a personal vision:

WHEN YOU THINK ABOUT OUR WORLD AND SOCIETY, WHAT INSPIRES OR EXCITES YOU?

WHEN YOU THINK ABOUT OUR WORLD AND SOCIETY, WHAT UPSETS OR ANGERS YOU?

IF YOU COULD WAVE A MAGIC WAND AND MAKE A DIFFERENCE IN THE WORLD – WHAT WOULD YOU CHANGE? HOW WOULD THE WORLD BE DIFFERENT? BE AS SPECIFIC AND DESCRIPTIVE AS YOU CAN.

HOW CAN YOU, AS A PHILANTHROPIST, HELP CREATE THE WORLD YOU IMAGINED?

- > What skills could you bring to your interest?
- > What roles can you imagine playing, e.g. convener, catalyst, capacity builder?
- > Are you more interested in supporting organizations or people?
- > What roles do I want to play as a donor?
- > Do you want to be “hands on” or “arm’s length from” your philanthropy?



## WRITING A MISSION STATEMENT

Once you have taken a look at your values and done the visioning exercise, you may want to write a mission statement for your philanthropy. At a minimum, a mission statement is a short description of what you want to accomplish with your giving and why. It speaks to the question of how you are going to contribute to your vision of the future. Consider the following questions.

- > What issue(s) do I want to affect and how?
- > What populations do I want to benefit?
- > What are my core values?
- > What roles do I want to play as a donor?
- > What is my geographic scope?

BELOW ARE SOME EXAMPLES OF MISSION STATEMENTS THAT MAY HELP YOU CRAFT YOUR OWN.

- > My primary interest is to promote approaches to homelessness in my home state that bring 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.

# Notes

## Take a Step

Take a step towards more strategic philanthropy.  
Leave a lasting mark.

Call to open the conversation or visit us online:  
617.338.2590 or [www.tpi.org](http://www.tpi.org)

Together, we'll take your giving further.



Act boldly. Give wisely.

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**The Philanthropic Initiative** 420 Boylston Street Boston, MA 02116 / 617.338.2590