

RECIPE FOR GOOD



A WORKBOOK TO IDENTIFY YOUR VALUES &
DEVELOP A PERSONAL PHILANTHROPY STRATEGY

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HOW DO YOU WANT TO FEEL WHEN YOU GIVE?

Circle all that apply

SATISFIED ENGAGED FULFILLED

MOTIVATED JOYFUL

EXCITED PROUD INSPIRED

PURPOSEFUL HELPFUL

EVERY EMOTION YOU CIRCLE IS ACHIEVABLE!

Mise en place

In the kitchen, Mise en place, or “*putting in place*” in French, means preparing ingredients, setting out bowls, and establishing order even before you begin cooking.

For your strategy, this means beginning with the basics by outlining a mission statement and brainstorming goals before ever deciding which organizations to donate to.

Successful organizations are governed by mission statements, clear goals, and defined strategies. While you and your family may not run a business or operate a foundation, it’s important to think of your giving in a professional capacity to ensure your personal goals are met and your giving is as fulfilling as possible.

A company is less likely to succeed without a strong mission statement. By not fully understanding its motivation, actions can be taken without proper guidance. In the same way, our personal philanthropy must be guided by a driving force so that when opportunities come our way, we can easily determine if it will be a good fit or not.

What do you value?

Have you ever read an interview with a chef where he explained why he started cooking? The story of his first food memory, or working in his grandmother’s restaurant during long summers might seem like an inconsequential detail, but it’s more revealing than you might think. We no longer just know that he’s a great cook, but we know why he took the journey. We know what he values.

You can’t give in a meaningful way without first identifying what you care about.

LIST A FEW WORDS THAT DEFINE YOUR VALUES

E.G. ACHIEVEMENT, BEING PART OF MY COMMUNITY, RELIGION, FRIENDSHIPS,
WEALTH, INTEGRITY, KINDNESS, ETC.

*“When your values are clear to you, making decisions becomes easier.”
-Roy Disney*

Values in Action

Choose 1-3 of the words you wrote down and think about what they mean in action. Think about how you want these values to take action in your life.

For example, if you wrote down “community,” you might desire to volunteer your time at a local organization.

Notes

Giving Priorities

Note the top three sectors that are a priority for you and your family. Be specific, if possible. (For example, if food is your passion, define which areas are most interesting to you, such as school lunch reform or ending childhood hunger).

- 1.
- 2.
- 3.

Determine Commitments

1. What are you willing to contribute financially?

a. Monthly: \$ _____

b. Yearly: \$ _____

2. Will each family member have their own budget for giving, or will you make decisions together? Also consider a set of “discretionary” grants that may be somewhat outside of your key interest areas but where you may want to experiment (sch as Kickstarter).

Notes

MISSION STATEMENT

I value _____, _____,
and _____. I care deeply
about _____, _____, and
_____. In my lifetime, I want
to have made a difference in the

EXAMPLE:

I VALUE HONESTY, KINDNESS, AND COMMUNITY. I CARE DEEPLY ABOUT IMPROVING NUTRITION, BETTER FOOD ACCESS, AND ERADICATING NEGLECTED TROPICAL DISEASES. IN MY LIFETIME, I WANT TO HAVE MADE A DIFFERENCE IN THE LIVES OF OTHERS BY SETTING A GOOD EXAMPLE FOR MY CHILDREN, AND SERVING ON A LOCAL BOARD.