



Setting your giving approach

A practical guide

Summary

This APS toolkit is designed to spark some ideas and get you started on developing your own giving approach.

Putting some time aside to do this is helpful for a number of reasons. It will assist you to articulate your motivations for giving, express how you would like to give, and also provides a framework to assess charities and causes.

If you would like some help focusing your thoughts, APS can run a facilitated session for you and those involved in your giving.

Let's get started!

A giving strategy

This diagram reflects the components of a giving strategy.

You can choose to consider and record your ideas and goals around a few, or all of these areas.

Broadly, there are three overarching questions relevant to your giving:

- the 'why'
- the 'what', and
- the 'how'



1. What inspires you to give?

Alongside your values, your experiences and beliefs will inform your giving. You can ask yourself the following questions to help clarify those for you personally:



Who in your life has had a strong influence on you? What have you learned from them?

When you think about the world and society, what inspires you, and equally what upsets you?

What would you like younger generations to know about giving back? How would you like to inspire or encourage others? What life legacy would you like to remain after you've gone?

2. What are your values and how do they guide your giving?

Put simply; values are the things that you believe are important. As an individual, your personal values are a lens through which you see the world and make critical decisions. Articulating your values enables you to align your charitable giving with the things that matter most to you.



How do you decide on the values for your giving?

If there are multiple people involved in your giving activities, the values for your giving fund or foundation may differ from your personal ones. A good place to start is to have everyone articulate their individual values. You can then assess the commonalities and refine them in order to decide on those that fit the vision of your giving fund or foundation.

If you aren't sure how to articulate your values, you can use the list on the following page or come up with your own.

- Underline all those values that resonate with you. Most people will end up with a list of 10-20 values
- Have a look for commonalities. Are there some that can be covered by others?
- Challenge yourself to find no more than three that hold the greatest meaning for you

Values



Suggested values

Abundance	Efficiency	Imagination	Reason
Accountability	Empathy	Independence	Recognition
Achievement	Empowerment	Individuality	Recreation
Adaptability	Endurance	Initiative	Reliability
Adventure	Energy	Integrity	Resourcefulness
Affluence	Enjoyment	Influence	Respect
Altruism	Enthusiasm	Ingenuity	Responsibility
Ambition	Equity	Innovation	Restraint
Authenticity	Excellence	Inquisitive	Rigor
Authority	Excitement	Inspiring	Risk
Balance	Experience	Integrity	Safety
Beauty	Exploration	Intelligence	Security
Being the best	Expression	Intuition	Self-discipline
Belonging	Fairness	Job security	Self-reliance
Brilliance	Faith	Joy	Self-respect
Calm	Fame	Justice	Selflessness
Candour	Family	Kindness	Sensitivity
Career	Fearlessness	Knowledge	Service
Caring	Fidelity	Leadership	Simplicity
Collaboration	Financial stability	Learning	Skill
Community	Focus	Legacy	Spontaneity
Compassion	Forgiveness	Liberty	Sportsmanship
Confidence	Freedom	Logic	Success
Connection	Friendship	Love	Teamwork
Contentment	Frugality	Loyalty	Thoroughness
Contribution	Fun	Mastery	Thrift
Conviction	Future generations	Maturity	Tolerance
Cooperation	Generosity	Meaning	Tradition
Courage	Giving back	Moderation	Trust
Courtesy	Good health	Openness	Truth
Creativity	Grace	Optimism	Understanding
Curiosity	Gratitude	Order	Uniqueness
Decisiveness	Growth	Originality	Unity
Dedication	Happiness	Parenting	Versatility
Determination	Hard work	Passion	Vision
Devotion	Harmony	Patience	Vulnerability
Dignity	Home	Peace	Warmth
Diligence	Honesty	Perseverance	Wealth
Discovery	Honour	Poise	Well-being
Diversity	Hope	Power	Winning
Drive	Humility	Pride	Wisdom
Effectiveness	Humour	Prosperity	Wonder

Linking values and giving

There is no single right way to incorporate your values into your philanthropy. If you are developing a vision and mission for your foundation, it's important to ensure they align with your values. You can also incorporate your values into the practical areas of your giving. Below are some examples:

Values driving the 'what'

When you are deciding on the focus areas for your giving, consider how they align to your values.

- We value learning – we focus on education and empowerment
- We value family – we focus on disadvantaged children and support for single parents
- We value financial stability – we support financial literacy and microfinance programs
- We value creativity – we support arts and culture organisations
- We value curiosity – we support early-stage medical research

Values guiding who we give to

Our values can also be useful in helping decide the types of organisations you choose to support

- We value discovery – we look for start-ups and innovators
- We value tradition – we support established faith-based organisations
- We value leadership – we fund organisations with a strong board and inspiring CEO

Values guiding how we make decisions

Values can be useful for framing how you make decisions, particularly when there are multiple directors and/ or family members involved

- We value diversity – each person chooses and champions a particular cause or charity
- We value connection – all giving decisions are done after an open joint conversation
- We value wonder – the next generation have a pool of money to allocate as they wish

Values guiding how we view impact

The impact we want to make can also be aligned with our values

- We value community – success is having the wider community engaged not just individuals
- We value truth – our charity partners tell us what hasn't worked as well as what has
- We value trust – those working on the ground know best how to solve the problems

Family values driving giving



“As a family foundation, we have many interest areas. It’s been helpful to start by understanding and connecting to the family’s shared values.”

Jocelyn Evans
Paskeville Foundation

The Paskeville Foundation was set up by Jocelyn’s parents, Peter and Suzanne and Jocelyn, along with her brother and sister are directors of the PAF. Making decisions with five people involved is often challenging, and Jocelyn’s family have some very diverse interests when it comes to social causes. For Jocelyn, her passion for giving to nature and conservation came from working in outdoor education and understanding the importance of minimising our impact on the environment. Other members of her family are interested in mental health, education and life skills. I facilitated a values conversation with the Evans family, which Jocelyn said was extremely helpful. By articulating and connecting to the family’s shared values they’ve been able to develop a set of criteria that allow them to support organisations they all agree on.

They’ve focused on the crossover between nature, young people and mental health through their funding of Human Nature Adventure Therapy. The team at Nature Conservation Margaret River demonstrated passion, thoughtful spending and strong leadership, key criteria that were identified during the values discussion.

To read the full story - [Click Here](#) to go to the APS website

3. Who, what or where do you want to fund?

Contemplating the following questions can help you articulate the specific area(s) of focus for your giving. While some people have a single area of focus, many philanthropists will choose to support a variety of causes and/or beneficiaries.



What sectors or specific issues do you wish to affect? (You may wish to review the list on the next page). If, for instance you are interested in education, do you want to focus on early childhood, tertiary education, vocational training etc?

How do you think change can occur in these areas? In the education example, is it scholarships for children from remote areas, teacher training, technological solutions?

What group of people are you looking to support? Is it children living below the poverty line, those with learning difficulties, gifted and talented or children who have been subjected to bullying?

Do you have a geographical preference for funding? Are you looking to fund internationally, nationally, in particular states, regions or local areas?

Are there any criteria you may wish to apply to the charities you support? Are you looking to support start-ups or established charities? Do you have a preference for if/how much government funding they receive?*

Potential funding areas

There are many areas currently funded by philanthropists looking to make a positive and lasting impact on society. This list covers the main categories and beneficiaries to help you focus where you may want to direct your gifts.



- Aged care & issues affecting older people
- Animal welfare & protection
- Arts, culture & humanities
- Asylum-seekers & refugees
- Children & young people
- Criminal justice
- Democracy, civil society & advocacy
- Disability services & support
- Disaster response in Australia
- Disaster response overseas
- Domestic & family violence
- Drug & alcohol issues
- Education, training & employment
- Environment
- Financial capacity-building & micro-finance
- Health services & support
- Homelessness
- Human rights
- Indigenous
- International development
- LGBTQI : Supporting people who identify as LGBTQI&Q
- Medical research incl. cancer
- Mental health
- Philanthropy & not-for-profit capacity
- Religion & spirituality
- Rural, regional & remote (RR & R) issues
- Social enterprise
- Sport & fitness
- Veterans & returned soldiers
- Women & girls

Decision making & the evolving giving journey

The Metamorphic Foundation was established in 2018 to honour the memory of Dr Victor Wall. The foundation's name – Metamorphic – reflects both Victor's profession as a geologist, as well as the family's aspiration to stimulate positive social change through philanthropy.

'Determining which lever of change to push has been interesting for us – initially one area we thought we'd like to support was encouraging young people into science, which was Dad's passion. But then when we looked at literacy levels among vulnerable populations, including Indigenous communities, we asked ourselves 'How can we encourage young people into science if they can't read?' That led to our early investment in the [Indigenous Literacy Foundation](#).' - Sarah Wall



Being respectful of charities' time

Some members of the Metamorphic Foundation have a background in the charitable sector and now being on the gifting side, they think it's very important not to become a 'high-touch' donor that expects a lot of hand-holding for the grants they make.

Support operational costs and stay flexible

'Something I was concerned about at the beginning of Metamorphic's journey was the idea of not directing money to a pool of rising administration costs,' explains Pat. 'I've learned a lot about that since then. Now I see that operational costs are fundamental to an organisation's needs. That's been a shift for me.'

'It's also important for us to adapt to changing circumstances externally,' observes Sarah. 'That drove us to provide some bushfire support early this year, then we've responded to the reality of COVID-19 more recently. We don't want to be set in stone with our giving, we want to adapt to what's going on in the world and to maintain our agile approach to our giving programs.' - Pat Wall

To read the full story - [Click Here](#) to go to the APS website

4. What do you want to achieve in your selected cause area?

Setting a vision

Your vision is your inspirational, long-term view of the kind of world you would like to see, or how the world would look if the problems you see were solved. A vision statement is broad but concise.

Some examples of vision statements are:

"Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives."

"A vibrant, healthy, fair and sustainable Australia" (Ian Potter Foundation)

Vision



Articulating your mission

Your mission statement is a summary of the reason your foundation or fund exists, and the causes and/ or beneficiaries you support in a quest to achieve your Vision. Whilst a vision is about the future, your mission is about the present.

Some examples of mission statements are:

"Our purpose, put simply, is to support practical and effective projects making a difference in the alleviation of poverty." (Planet Wheeler Foundation)

"Our mission is to grow effective funding to the environment. As a membership-based organisation, we work with philanthropic funders who want to become more effective in their giving to address environment and climate change issues." (AEGN)

Mission



Mission driving decision-making



When Mike and Geraldine Roche talk about their Private Ancillary Fund (PAF) that they established in 2013, they affectionately refer to it as “Sally”. Officially called Sally Foundation, the name makes perfect sense when you know its personal origins.

Sally Foundation was named in memory of Geraldine’s maternal grandmother, who sailed to Australia from England in the early 1900s. As Geraldine explains, “originally from a well-to-do family, Sally’s life was one of significant struggle in rural Queensland, and her determination, gentle ways and always seeing the best in a situation provided the inspiration for our foundation.”

Not surprisingly the motto of Sally Foundation is “we invest in your future”, and sustainability is one of the key factors Mike and Geraldine look for when selecting causes and projects to support. As Mike explains, “We don’t believe in the word donor, we see ourselves as investors, and we’re always asking: is it a project that will help them to become self-sufficient?”

Sally Foundation divides its energies between helping youth in regional and rural communities in Australia, and disadvantaged communities in Zimbabwe. Mike is the prime motivator of the work in Zimbabwe, and Geraldine is the driving force of the Australian projects.

Geraldine has some advice for others just starting out. “You have to work out what’s important to you, what you connect with.” Mike also adds, “You need to think about how involved you want to be. And you really want to be aligned with what the organisation is doing. If you’re not on the same wavelength then it won’t work.”

To read the full story - [Click Here](#) to go to the APS website

5. How do you make decisions about who to fund?

Setting out guidelines on how funding decisions will be made can provide both clarity for everyone involved as well as an understanding of the opportunities for your charity partners.

- Does one person have the final say on all funding?
 - Do you make decisions by consensus?
 - Do you divide the available funding pot up amongst focus areas and/or family members to allocate as they see fit?
-
-
-

6. What are your desired outcomes and how do you track your progress?

The model below demonstrates the different levels at which impact can be understood and assessed. Understanding where your priorities lie will help develop a measurement framework for your gifts.



How you track and assess your progress will be dependent on the change you wish to see aligned with your vision and mission. While there is no single best way to evaluate the impact your funding is making, it makes sense to work with your charity partners to define how progress can be tracked and success is defined.

Having an impact

What are the changes you would like to see in the lives of the people your funding supports, for example, improved confidence or living in safe housing?



Are there any broader changes you would like to see in the world as a result of your funding, for example, a change in government policy or reduced CO2 emissions?

Tracking progress

While the measurement and evaluation of particular charity programs will vary depending on their sector and the outcomes they are trying to achieve, it is worth considering your preferences in the type of reporting you receive from a charity.



How often would you like to hear from your charitable partners and how (email, personal catchups, site visits, newsletters, annual reports etc)?

Are you expecting the charity to provide a specific report on how your gift was used and its impact, or would you be happy to receive reports detailing the charity's overall success and impact? Remember that, for smaller gifts, the burden of reporting on that particular gift may negate the value of the gift itself.

What is most important to you? Would you like to hear stories directly from beneficiaries on the impact of the charity's work in their lives, or would you rather understand how many people have benefited from the program?

A rewarding multiplier effect

Scott Williams AO has been funding education for over 20 years and started a private ancillary fund (PAF) in 2017 to make his charitable giving go further. For Scott, the most satisfying part of supporting education is the long-term multiplier effect of his giving.

“It’s a tremendous return on investment for donors. I’m a businessperson, so I can’t help it – it’s using the same approach to create efficiency and be effective.”



"The leveraging effect really attracts me. Over the course of their lifetime, a successful student might easily earn 100 times whatever I may have given them from additional income because of their training."

By supporting university students in business and education, Scott is investing in the long-term economic development of regional areas. “Evidence shows that people who study in the regions go back to the regions, and this keeps the town’s economy going. The money I give to help one student complete a degree will be multiplied by the people they ultimately employ, and one qualified teacher during their career might teach 600 students.”

He also supports primary school literacy and numeracy programs with The Smith Family to build foundational skills for lifelong impact.