


# Family Philanthropy

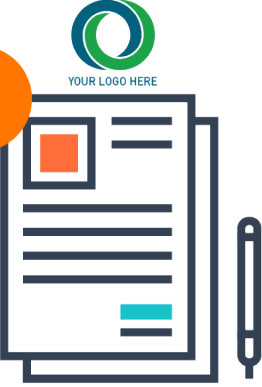
## JUMPSTART TOOLKIT

Content Capsules for Community Foundations


Five parts, all captured in one Word document for easy cut-and-paste or tweak to make your own!


One of the biggest needs we've heard from community foundations is that they don't have any simple ways to get donors started with family philanthropy. This toolkit is a great 2018 jumpstart to engage your donors.





**1**  **YOUR LOGO HERE**  
keynote article  
*including:*

- One-time license fee: \$425
- Perfect for marketing communications & donor engagement professionals
- Immediately gain credibility as a family philanthropy resource
- Based on years of research and experience

**2**  six cut-and-paste social media posts to promote the article (3 short, 3 long)

**3**  six suggested awesome photos

**4**  tips for how to use this toolkit

**5**  plug & play worksheet for families

## Instructions

This document contains everything you need to quickly and easily jumpstart a mini-initiative to engage donors in family philanthropy. This material is based on research and experience on what really works to get families involved with community foundations.

You'll be glad to know that this toolkit is designed to allow you to fully implement the mini-initiative with only 5 hours--or less--of your own time required.

### HERE ARE THE FIVE TURNKEY RESOURCES IN THIS TOOLKIT:

1. In this document, you'll find the full text for a keynote article, called "Jumpstart Your Family Philanthropy Traditions. It's easy to cut and paste this article into a blog post on your own website, tweaking the language however you wish. Voila! Instant thought leadership on the topic of family philanthropy.
2. This document includes suggested text for three social media campaigns to help you drive traffic to the keynote article.
3. We've provided you with six compelling photos. Pick and choose from these photos to post as visuals with the keynote article and the social media posts, or use your own photos.
4. In the Appendix of this document, we've provided you with the text of a Family Philanthropy Worksheet for your donor families. You can easily add your logo and tweak the text as you wish!

### HERE IS AN EXAMPLE OF HOW YOU COULD USE THE RESOURCES PROVIDED IN THIS TOOLKIT:

1. Use the keynote article as the basis for a campaign targeted at building the next generation of donors. The intended audience includes both current and prospective donors.
2. Post the article on your blog, or in another place on your website, on the date you launch the campaign.
3. On Tuesday or Wednesday of each week for three weeks following the date you launch the campaign, post one of the long social media posts (provided below) in your e-newsletter and/or LinkedIn, and also post one of the short social media posts on Twitter and/or Facebook. Always include a link to the article in your posts.

4. Pay attention to your views and likes to see what material resonates best, and with whom.
5. Make a note of the donors and prospects who like your posts. This is an important clue that they are interested in learning more about family philanthropy.
6. Always follow up with interested donors and prospects to see how your community foundation can help them. You can use the worksheet as a way to follow up.

## Keynote Article

### JUMPSTART YOUR FAMILY PHILANTHROPY TRADITIONS

It's never too late--or too early--to start engaging with your family in charitable giving and social impact.

Before you get started, though, it's important to get in touch with the mindset of today's generation of philanthropists. People today--of all ages--are living in a world where work, life, community, and wellness are intertwined.

Your Community Foundation is here to help you. This article outlines an easy, three-part approach to making the most of your own family's giving experience:

**PART I: A FOUR-STEP FORMULA**

**PART II: YOUR PERSONALITY MATTERS!**

**PART III: CELEBRATE!**

Let's get started!

#### **PART I: A FOUR-STEP FORMULA**

To maximize your family's engagement, consider using a research-based, four-part formula for approaching the philanthropy activities you do together. The four steps are Affirmation, Education, Inspiration, and Motivation. The steps are outlined below. Of course, the team at your Community Foundation is here to help you through the process.

## 1. Affirmation

Basic principles of positive psychology can make a huge difference in the success of your family's philanthropic experience. Here's what you need to know from the [research](#):

- Before a person can become deeply engaged, emotionally and intellectually, in a community or a cause--or even philanthropy in general--he or she must feel affirmed that what he or she is doing already to "do good" is in fact good.
- This includes not only giving to charities, of course, but also volunteering in the community, recycling and respecting the environment, donating canned goods, serving on boards of directors or committees, and attending community events.
- This also includes emerging methods of philanthropy and social impact engagement, such as purchasing products that support a cause, marketing favorite charities through social media, and even committing to personal and family health and wellness.
- The emerging methods of social impact are especially important to members of the next generation, who view their social impact as wide-ranging and not necessarily restricted to the definition of "charity" according to the Internal Revenue Code.

The affirmation step is the most important component of getting your family involved in philanthropy to a level where they are making a significant and positive impact in the lives of people in your community. As is the case with most conversations that touch both the heart and the mind, the dialogue may be hard to start. Not to worry! Here is an icebreaker you can do in four easy steps:

### "Affirmation" Ice Breaker

1. Ask each family member to verbally share the name of his or her favorite charity.
2. Next, ask each person this question: *Why do you enjoy giving to your favorite charity?*
3. Then, ask participants to write down their answers. Encourage them to take time to think about it. As the family facilitator, share your answer first, verbally. Then ask participants to share verbally.

4. Finally, ask your family to pay attention to how they are feeling, right now. Then, share with your family the following researched-based observation:

*When people talk about giving, they relax. They become more upbeat. They lean in. They keep on talking. They are proud, confident...emboldened even. And they are happy. They feel better!*

**Here is the key point you are communicating to your family:**

*Philanthropy is more successful--and does more good for the people who need it--when philanthropy feels good to the person doing it.*

If your family is an academically-oriented crowd, you can even explain the science behind this phenomenon:

*At first glance, philanthropy and positive psychology appear to have very little in common. Philanthropy is a term generally associated with giving money to charities, doing good in the community, and creating social value. Positive psychology usually connotes an academic approach to emotional strengths and virtues that enable people to thrive.*

*But there is indeed a connection. After all, philanthropy, according to the classic dictionary definition, means a "love of humanity" in the sense of caring, nourishing, developing, and enhancing "what it is to be human" on both the benefactors' and beneficiaries' parts. The connection is right there.*

*What's more, the benefits aren't limited to your mood. After scouring websites, journals, blogs, articles, and more, a team of researchers uncovered dozens of studies linking philanthropic behavior and improved physical health. Research suggests activities such as volunteering and giving can lead to a longer life, lower blood pressure, and better pain management.*

The bottom line is that "affirmation" requires acknowledgment—without judgment—that giving comes in a variety of forms. It's especially important to emphasize this concept with your children so that they feel empowered to make a difference in other people's lives in the ways that mean the most to them. This is one of the best ways to instill philanthropic values that will last a lifetime.

## 2. Education

Opportunities for learning about philanthropy are in demand. So if you are getting your family involved, you are in good company. Check out the trends:

1. Students at all levels are interested in learning about activities in the community that result in lives actually being changed for the better.
2. Parents want to know how to teach their young children about doing good, and teach their teens and adult children, too.
3. Parents and grandparents want to know how to use philanthropy to create multi-generational traditions for preserving family values.
4. Young professionals are seeking new ways to gather information about nonprofits, philanthropy, and social impact, especially online.
5. Corporate executives are seeking techniques for charitable planning that meet their tax and estate planning objectives. They are also looking for new ways to involve employees in the company's community engagement programs.

Fortunately, education is a process of self-discovery—not a prescription for how to do good the “right” way. This means that whatever you and your family are doing right now to get involved with your favorite causes is absolutely a step in the right direction and a terrific foundation for making an even bigger impact.

Take the time to learn as much as you can about the causes you love. Start your journey of learning both online and with the professionals at the Community Foundation, who can help you make a meaningful difference in the causes you love the most.

## 3. Inspiration

We all know that stories are powerful. Stories of people making an impact in the community will inspire others to pursue their own charitable dreams. Keep these two themes in mind:

1. Certainly the cause selected is an important part of any story, so pay attention to how your favorite charities are using your dollars.

2. As an additional way to enhance the stories you share with your children and family members about philanthropy, be sure to talk about the “giving” side of the equation. In other words, talk about the point of view of the person doing the good.

Here are a few discussion questions you can use as the basis for developing your own dialogue with your family members:

1. What did the charity do with donors’ dollars to improve lives?
2. How did the charity measure success of its initiatives?
3. How did the experience with philanthropy make the giver feel?
4. How did the giver’s own life improve, right along with the lives of the people who ultimately received the charitable support?
5. How did the giver’s relationships with children and family get better by pursuing philanthropy together?
6. How did the giver make positive changes to her mental and physical health by integrating philanthropy into her life?
7. How was the giver’s life enriched by feelings of gratitude and the ability to help people in need?

Generosity empowers the giver, and a story is much more powerful to inspire others when it reinforces that theme. You will love the results inspiration delivers with your children of all ages!

## 4. Motivation

Motivation is always the moment of truth, isn’t it? You have to be sure you and your family have the tools and information to act on your philanthropic desires. Your Community Foundation can help, so don’t hesitate to reach out to our team.

Think about these tips as you motivate your family to get involved with favorite causes:

1. The first key to motivating a person to “do good” and become more involved in philanthropy is to offer easy ideas in step-by-step format so that it does not seem overwhelming.
2. This is especially true for a young professional, brand new donor, and teenagers.
3. These “emerging” philanthropists are typically busy in their careers and social lives, so you have to offer easy points of engagement.



4. Plus, they are accustomed to multitasking in bite-sized activities, usually conducted at least in part online.
5. Examples of motivating activities are donating small amounts to three favorite charities online, volunteering one day a month at a favorite charity identified through an online search, and committing to clean out closets and donate gently-used clothing. You can start small to make a big difference.

Remember that people at all levels of giving frequently talk about this frustration: “I want to help, but I just don’t know how I can help.” It is not useful for a person to be told to “get involved” with nothing specific to back it up—no call to action. So, give your family members easy steps to get involved.

Another key to successful motivation in the social impact space is that people must believe that their acts of doing good, no matter how small, make a difference. “My gift doesn’t matter” is often top of mind for people giving money or donating time. Changing that thinking will better motivate people to get involved—on their own terms—in something specific. Every gift really does make a difference.

## PART II: YOUR PERSONALITY MATTERS!

Each of us has our own approach to “doing good.” Each of us leans toward one of the three Social Impact Personality Types uncovered in a five-year research study: Investor, Activator, or Connector. Use our Family Philanthropy Kick Off Worksheet [\[link to Family Philanthropy Kick Off Worksheet\]](#) to get in touch with your type. Remember, when you get involved in philanthropy, you are not only improving the lives of others, but also your own happiness and life satisfaction.

There are three Social Impact Personality Types: Investors, Connectors, and Activators. Here is a description of each one:

- **Investors** prefer to engage in social impact activities that are independent and do not require scheduling dedicated time or working directly with others in the pursuit of a charitable endeavor.
- **Connectors** prefer to engage in social impact activities that are social in nature, involving the opportunity to get together with others.

- **Activators** are passionate about participating in the causes they care most about, and they tend to focus on “changing the world” and impacting one or more social issues on a broad scale.

These icons make them easy to remember:

Activator	Connector	Investor
		

## PART III: CELEBRATE!

Remember, it's all good! When families embark on a journey to make philanthropy a part of their lives across generations, it often starts with simple concepts: Having fun as a family, getting in touch with nature, being authentic and open about values, donating canned goods or clothing to families in need, recycling cardboard and aluminum cans, celebrating every birthday and holiday with a big cake and a gift to charity, buying wrapping paper from the school fundraiser, contributing to a handful of favorite charities—even eating healthy food and appreciating every peaceful moment. In any household, “doing good” is a powerful way to create a sense of belonging—in the family, the community, and the world.

There is truly something for everyone in today's social impact culture. Keep in mind the 10 Ways to Do Good that make up today's philanthropic mindset:

1. Caring about health and wellness
2. Giving to charities
3. Volunteering at a charity
4. Serving on a charity's board of directors
5. Purchasing products that support a cause
6. Recycling and respecting a sustainable environment
7. Donating items of food and clothing
8. Marketing a favorite charity
9. Sharing with family and friends in need
10. Celebrating at community events

The experience of charitable giving is worthy of celebration--in the broadest sense possible. This is because contemporary philanthropy, social impact behavior, and community-focused emotions extend beyond the act of writing a check and into the well-rounded lives of most Americans. Social impact--in a broad sense--is the contemporary mindset surrounding philanthropy. You can embrace all of the “Ways to Do Good” with your family and get even more out of your family's social impact experience.

As always, your Community Foundation is here to help.

# Social Media Posts

## WEEK 1

### Long Post (LinkedIn, e-newsletter)

Taking time to think about other people is what doing good is all about. And it should make *you* happy, too. When you are in touch with an indicator known as your “Social Impact Personality Type,” you’ll naturally be drawn to the ways you find the most meaning and enjoyment in doing good. Here are the types:

- **Investors** prefer to engage in social impact activities that are independent and do not require scheduling dedicated time or working directly with others in the pursuit of a charitable endeavor.
- **Connectors** prefer to engage in social impact activities that are social in nature, involving the opportunity to get together with others.
- **Activators** are passionate about participating in the causes they care most about, and they tend to focus on “changing the world” and impacting one or more social issues on a broad scale.

Are you an Activator, Investor, or Connector? You can’t go wrong! Philanthropy is about celebrating what it is to be human. What matters is that you feel good about the ways you’re making a difference in others’ lives and enriching your own life, too. You are human. That’s all it takes to make lives better--both your own and those of people in need.

Learn how to get your family involved in philanthropy by working with the team at the Community Foundation.

[\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

### Short Post (Twitter, Facebook)

Your charitable personality: Activator, Investor, Connector? Everyone can get involved at the Community Foundation. [\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

## WEEK 2

### Long Post (LinkedIn, e-newsletter)

Giving comes in a variety of forms. It's especially important to emphasize this with your children so that they feel empowered to make a difference in other people's lives in the ways that mean the most to them. This is one of the best ways to instill philanthropic values that will last a lifetime. Here are three ideas for starting the conversation with kids of any age:

- Encourage children to reflect on their own gratitude as they write thank you notes for holiday gifts or birthday presents.
- Encourage children to review the wide range of their own social impact activities, including giving to charities, volunteering, serving on boards, recycling, donating food and clothing to people in need, and even caring for their own health and wellness.
- Plan one or two social impact and charitable giving activities with your children each month.

Get involved with the Community Foundation to learn even more! [\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

### Short Post (Twitter, Facebook)

Ready to build family philanthropy values that will last for generations? The Community Foundation can help. [\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

## WEEK 3

### Long Post (LinkedIn, e-newsletter)

Did you know that “doing good” is actually good for you, your health, and your mood?

At first glance, philanthropy and positive psychology appear to have very little in common. Philanthropy is a term generally associated with giving money to charities, doing good in the community, and creating social value. Positive psychology usually connotes an academic approach to emotional strengths and virtues that enable people to thrive.

But there is indeed a connection. After all, philanthropy, according to the classic dictionary definition, means a “love of humanity” in the sense of caring, nourishing, developing, and enhancing “what it is to be human” on both the benefactors’ and beneficiaries’ parts. The connection is right there.

What’s more, the benefits aren’t limited to your mood. After scouring websites, journals, blogs, articles, and more, a team of researchers uncovered dozens of studies linking philanthropic behavior and improved physical health. Research suggests activities such as volunteering and giving can lead to a longer life, lower blood pressure, and better pain management.

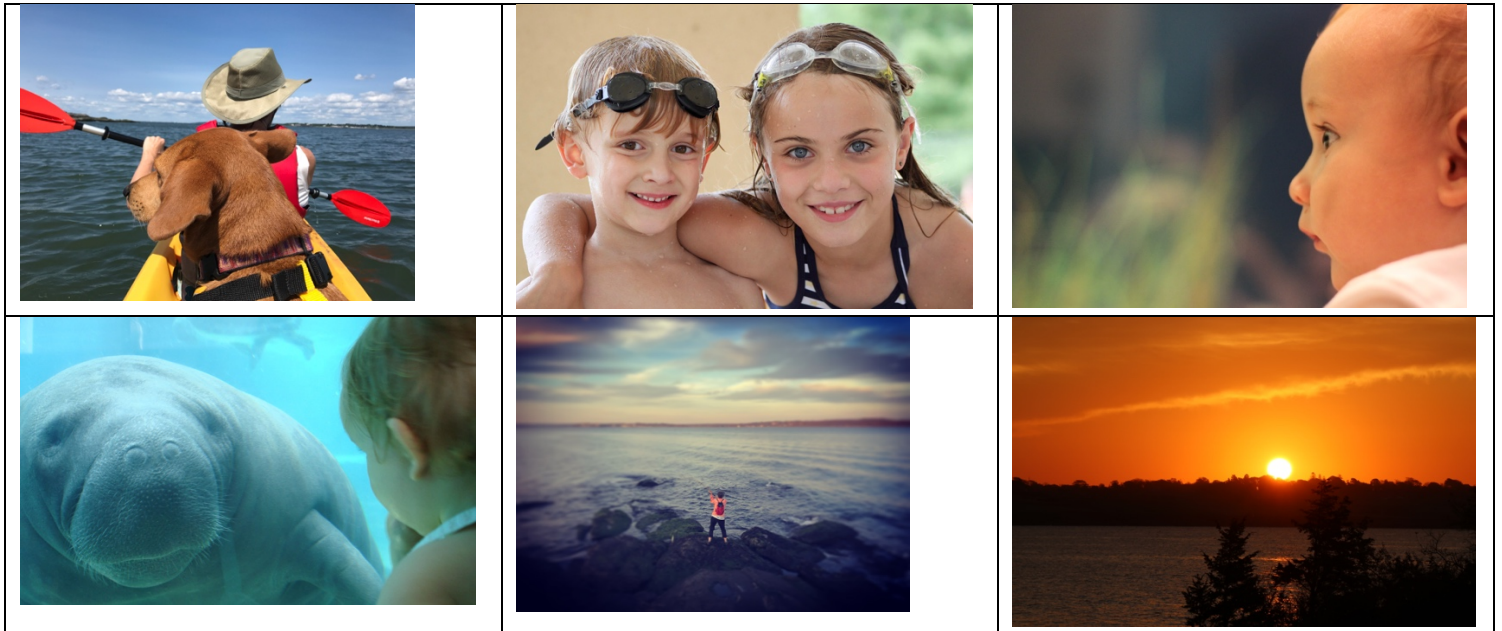
Your whole family can “do good” and feel even better when you work with the team at the Community Foundation. [\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

#### **Short Post (Twitter, Facebook)**

Philanthropy is good for your health and your mood. Make a difference by working with the Community Foundation. [\[link to Keynote Article\]](#) [\[use a photo provided by Embolden\]](#)

# Photos

Paste these royalty-free high-resolution photos in any of your articles or social posts.



# Appendix





YOUR LOGO HERE

## Family Philanthropy Kick Off Worksheet

Getting started with your family's philanthropy plan is easy when you and your family members each discover your own Social Impact Personality Type.


### **WHAT'S A SOCIAL IMPACT PERSONALITY TYPE?**

Each of us has our own preference for charitable giving activities, even if we are all supporting the same cause. Understanding your own type will help you and your family select the types of activities to align with the ways each person likes to "do good." This will help ensure that your entire family feels great about the ways your family is giving back. Your Community Foundation is here to help you, every step of the way!

### **INSTRUCTIONS**

As you work through the "10 Ways to Do Good" described in the pages below, keep a rough tally by placing an "x" underneath the "Type" next to each activity in the grid provided here.

Are you an Activator, Connector, or Investor? Or are you a combination of two or three? There is no right or wrong answer. The point is to get in touch with how you feel about the ways you do good, so that you can recognize these preferences in yourself.

	 <b>Activator</b>	 <b>Connector</b>	 <b>Investor</b>
<b>Caring</b>			
<b>Giving</b>			
<b>Volunteering</b>			
<b>Serving</b>			
<b>Purchasing</b>			
<b>Recycling</b>			
<b>Donating</b>			
<b>Marketing</b>			
<b>Sharing</b>			
<b>Celebrating</b>			

# CARING AND SOCIAL IMPACT PERSONALITY TYPE

CELEBRATING “WHAT IT IS TO BE HUMAN” BEGINS WITH YOU.

“Caring” means acting on a commitment to your own physical and mental well-being.



Activator



Connector



Investor

## What an Activator says about caring:

- “You have to be in touch with your own basic needs before you can truly help others achieve their own.”
- “It is really important to my mental well-being to stay current on humanitarian events and the overall challenges of our society. This better equips me to make a difference and makes me feel educated on the issues.”
- “My beliefs are part of my core. I believe people should have access to health care and healthy food—in developing countries, in our schools, and in my own

## What a Connector says about caring:

- “Treat yourself the way you would expect others to want to be treated.”
- “We are all in this together, and each of us is worthy.”
- “What goes around comes around.”

## What an Investor says about caring:

- “I can’t do much good for other people if I am not in good shape myself—mentally, physically, financially.”
- “It’s like they tell you on every flight—put the oxygen mask on yourself before you assist those traveling with you.”
- “If you can give a little, you have a lot.”

home, too.”		
<p><b>Four Caring Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Traveling on a mission trip over spring break to a location you’ve always wanted to visit.</li> <li>2. Planting an organic garden with your favorite vegetables.</li> <li>3. Gaining leadership experience for your career by serving on the neighborhood association board of directors.</li> <li>4. Getting regular massages to build energy reserves.</li> </ol>	<p><b>Four Caring Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Asking guests to give birthday gifts to your favorite charity in your name.</li> <li>2. Recycling the soda cans from your frequent weekend gatherings.</li> <li>3. Hosting a cocktail party to help a charity announce a capital campaign and also to enable you to network with guests.</li> <li>4. Encouraging friends to join you in frequenting a charming coffee shop that supports a local scholarship fund.</li> </ol>	<p><b>Four Caring Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Taking a few minutes every morning to arrange your priorities for the day, including saying “no” to event invitations that take you away from being most productive.</li> <li>2. Planning your retirement and setting your financial goals high enough to live the lifestyle you desire and still have enough to give to charity.</li> <li>3. Leading a social impact initiative in the workplace that drives bottom line results and also creates benefits for the community.</li> <li>4. Returning glass bottles to the store in exchange for cash.</li> </ol>

## GIVING AND SOCIAL IMPACT PERSONALITY TYPE

GIVING A LITTLE MEANS YOU HAVE A LOT.

“Giving” means contributing money or stock to a charitable organization recognized by the IRS.



Activator



Connector



Investor

### What an Activator says about giving:

- “I want to be sure the dollars I am giving are making a real difference. I want to see impact.”
- “I always devote the majority of my annual giving budget to supporting charities that are working to solve large-scale social issues.”
- “My giving dollars will make a bigger difference if I am personally involved in a charity’s programs. That’s the only way I can tell if my money is actually helping people in need.”

### What a Connector says about giving:

- “You never know when you might be at a point in your life where you need help from a charity. It’s important for people both to give to, and receive from, each other.”
- “It makes my day to get a thank you note from a charity promptly after I send a check.”
- “Some of my best friends are the people who work at the charities I support.”

### What an Investor says about giving:

- “I always check out a charity’s financials before I write a check by going online to GuideStar and looking at the charity’s Form 990.”
- “Our family considers gifts to charity as part of our overall investment portfolio. We are investing back into the community that has allowed us to be so successful.”
- “Maximizing the charitable deductions available under the Internal Revenue Code for giving to charity is the big win-win in philanthropy.”

<p><b>Four Giving Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Giving an increasing amount of money each year to a favorite charity based on the organization’s demonstrated results to improve the quality of life for the people or causes it serves.</li> <li>2. Giving money to three different charities collaborating to achieve a specific goal, such as increasing the graduation rate within a particular school, discovering new drugs to treat cancer, or rebuilding a community center in a blighted neighborhood.</li> <li>3. Giving to disaster-relief efforts after a hurricane, tornado, or earthquake.</li> <li>4. Giving money to charities with the condition that the charity report back on the results achieved with the money (e.g., 100 meals were served to homebound seniors).</li> </ol>	<p><b>Four Giving Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Hand-delivering checks to charities as an opportunity to say “hello” and “thank you” to the people working so hard to improve the lives of others.</li> <li>2. Giving money to a best friend’s favorite charity.</li> <li>3. Collaborating with family members during the holidays to make one big gift to a single charity instead of many small gifts to different charities.</li> <li>4. Encouraging children to add money to a piggy bank designated for charity and then mailing the money to the charity in an envelope with pictures drawn by the kids, or giving online with a credit card and emailing the pictures.</li> </ol>	<p><b>Four Giving Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Structuring an estate plan to include several bequests to favorite charities.</li> <li>2. Giving appreciated stock to a charity instead of cash, to minimize capital gains tax exposure.</li> <li>3. Setting up a donor-advised fund to organize annual giving to charities.</li> <li>4. Establishing a budget at the beginning of the year to include a percentage of income designated for gifts to charity.</li> </ol>

# VOLUNTEERING AND SOCIAL IMPACT PERSONALITY TYPE

ROLLING UP YOUR SLEEVES FOR YOUR FAVORITE CAUSE.

“Volunteering” means a hands-on contribution of your time to an organized cause that helps others.



Activator



Connector



Investor

## What an Activator says about volunteering:

- “I feel like the hands-on experience really gets me in touch with what my favorite charity is doing. When I am interacting with the people it serves, I know I am making a difference.”
- “The best way to learn about a cause is to understand it from ground up.”
- “When I am working side-by-side with the people who work at a charitable organization, I am showing the charity that I truly care about the cause. I am not just checking a box.”

## What a Connector says about volunteering:

- “My personal, professional, and family relationships are greatly enhanced when we volunteer together.”
- “Every volunteer event should include time to socialize and make friends with the people who work at the charitable organization.”
- “I am always looking for recreational activities that involve an element of volunteering.”

## What an Investor says about volunteering:

- “I enjoy volunteering when I can sign up for a specific time, show up for an hour, and do something that I know can be completed during the time I am there.”
- “I am happy to volunteer when the location is convenient, or when I am going to be there anyway.”
- “Time is money, so I think of volunteering in terms of the opportunity cost of the time I am choosing to invest.”

**Four Volunteering Activities Activators Enjoy**

1. Before committing to spending time with an organization, researching volunteer opportunities to be sure the experiences match favorite causes and personal goals for community impact.
2. Volunteering at three or four different organizations that support the same cause in order to attack a particular social problem from multiple angles.
3. Aligning volunteer activities to match specific professional skills.
4. Reflecting on each volunteer experience and asking oneself how his or her work connected directly to improving the quality of life of others.

**Four Volunteering Activities Connectors Enjoy**

1. A weekend outing where a few hours are spent volunteering, followed by a social hour, group lunch, or hosting a dinner at a volunteer's home.
2. Regularly polling a group of friends to decide where to volunteer, and switching it up every month.
3. A volunteer opportunity that involves working one-on-one with the people and families served by a charitable organization.
4. Scheduling a volunteer event with children, parents, siblings, and cousins around the holidays as a way to bring the whole family together.

**Four Volunteering Activities Investors Enjoy**

1. Assisting with cleanup at the school carnival during a designated thirty-minute time block.
2. Dropping by over the lunch hour to assist the bookkeeper at a charity that is located a few blocks away from the office.
3. Offering to drop off leftover flowers from the church service to a homebound member of the congregation who lives down the street.
4. Spending a few minutes each month helping edit a charity's email newsletter.



## SERVING AND SOCIAL IMPACT PERSONALITY TYPE

SOMETIMES THE PEOPLE BEHIND THE SCENES ARE THE ONES MAKING THE BIGGEST DIFFERENCE.

“Serving” means being active on a board of directors or similar group for a community or civic purpose.



Activator



Connector



Investor

### What an Activator says about serving:

- “Strong missions require strong stewardship. I feel a responsibility to be a part of sustaining a mission for many years to come.”
- “Good governance is every bit as important in the nonprofit sector as it is in the for-profit sector. Return on investment for the community is the payback for the dollars put into a charity.”
- “If you are really serious about positive social change, you ought to serve on the board of at least one of the organizations

### What a Connector says about serving:

- “Being on a board of directors is a great way to meet other leaders in the community.”
- “I like getting involved in the PTO because I can stay in close touch with the parents of my kids’ friends.”
- “Joining the fundraising task force was the most fun I’ve ever had with a charity event. Testing out caterers with the other people on the task force was great. We made an evening out of it, every time!”

### What an Investor says about serving:

- “When I get the pre-reading materials before each board meeting, I immediately flip to the financials and check the projections against budget.”
- “As a board member, I expect to receive information demonstrating a direct link between the charity’s work and an uptick in the quality of life of the people receiving services from the charity, measured in level of income, if possible.”
- “As a board member, my responsibility includes writing a check

<p>that is dedicated to the larger cause you are pursuing.”</p>		<p>each year to the charity, even if my budget permits only a modest gift.”</p>
<p><b>Four Serving Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Chairing a board of directors.</li> <li>2. Serving on a civic task force to explore options for redeveloping blighted areas.</li> <li>3. Joining a task force to generate support for a ballot initiative that would direct tax dollars to health care access.</li> <li>4. Being part of the steering committee for a community needs assessment.</li> </ol>	<p><b>Four Serving Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Serving as a director of two or three (or more!) charities at a time.</li> <li>2. Hosting the board of directors meetings at their home or office.</li> <li>3. Never missing a board or committee meeting.</li> <li>4. Signing up for the image and awareness task force for a brand new charity.</li> </ol>	<p><b>Four Serving Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Joining the investment or finance committee of a charity’s board of directors.</li> <li>2. Setting up regular meetings or phone calls with the charity’s executive director to get a ten-minute briefing on exactly where the charity stands against its goals.</li> <li>3. Setting expectations with the other board members and the executive director that board meeting attendance might be sporadic, given other demands on time.</li> <li>4. Researching a charity before agreeing to serve on its board to ensure that the charity is not the subject of lawsuits or bad press.</li> </ol>

# PURCHASING AND SOCIAL IMPACT PERSONALITY TYPE

CHANGE THE WAY YOU THINK ABOUT SHOPPING, FOR GOOD.

“Purchasing” means buying products and services that include a charitable element.



**Activator**



**Connector**



**Investor**

**What an Activator says about purchasing:**

- “I pay attention to a company’s story to figure out whether the company is for real. Does the company truly care about its people, its customers, and the community it serves? I want to know before I buy from it.”
- “I need to know that there’s really a ‘cause’ in the ‘marketing,’ meaning the charity actually benefits beyond just a few pennies and actual people are being helped.”
- “I will consider switching brands if I happen not to believe in the specific

**What a Connector says about purchasing:**

- “Brands that ‘do good’ are an important part of my personal and professional image. I wear them and use them proudly!”
- “When I have parties, I make a point to purchase beverages with a well-known connection to a charity displayed prominently on the label.”
- “When my friends tell me about a store that’s doing good in the community, I make a point to check it out.”

**What an Investor says about purchasing:**

- “Charities and businesses that work together through cause marketing are smart. They are leveraging consumers’ desire to make a difference.”
- “Contributing to a charity at the cash register of a retailer is awesome. So easy and efficient. Say yes. Swipe. Done!”
- “When there are two similarly-priced products, one from a brand that supports a cause and one that does not, I will always choose the cause-related brand over the brand that

cause a product is promoting.”		does not support a cause.”
<p><b>Four Purchasing Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Paying attention to global supply chain standards and buying only those brands that have a true humanitarian focus.</li> <li>2. Supporting brands that give back to specific causes in the local community.</li> <li>3. Reading the fine print in the full description of the charity and how exactly it is supported by the brand.</li> <li>4. Asking the executive director of a favorite charity for the names of merchants who support the charity’s cause and then making a point to go to those stores.</li> </ol>	<p><b>Four Purchasing Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Buying wrapping paper, candy, trash bags, and cookies from the kids who come to the door raising money for a school or athletic team.</li> <li>2. Flipping through People magazine to figure out what cause-related brands celebrities are wearing.</li> <li>3. Using trips to the grocery store with children as opportunities to educate kids about which brands give back.</li> <li>4. Giving holiday gifts to friends and family purchased from stores that support a cause, and also including a note on the gift tag indicating the name of the charity supported by the purchase.</li> </ol>	<p><b>Four Purchasing Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Shopping at charity “stores” where the charity is running a retail operation to boost its income.</li> <li>2. Making a note, mentally or in a notebook or a spreadsheet, of major purchases that supported a cause, and then counting an estimate of the charitable component of these purchases as part of an overall budget for social impact activities.</li> <li>3. Wondering whether the price of a product is too high because the brand is supporting a charity.</li> <li>4. Buying for true need rather than purchasing a product only because it supports a cause.</li> </ol>

## RECYCLING AND SOCIAL IMPACT PERSONALITY TYPE

LOVING THE WORLD WE LIVE IN.

“Recycling” means furthering a sustainable and regenerative environment.



**Activator**



**Connector**



**Investor**

### What an Activator says about recycling:

- “It’s our responsibility as humans and civilizations to leave the earth in better shape than we found it.”
- “I make certain to track the latest scientific studies about global warming and the melting of the polar ice caps. I need to stay informed.”
- “I simply cannot work for a company that does not clearly commit to best practices in sustainability.”

### What a Connector says about recycling:

- “Our family loves spending time outside and appreciating the beauty of our natural environment.”
- “I like to attend informational meetings in my community about the latest efforts to generate renewable energy.”
- “My ideal workplace is a LEED certified building. The positive energy is a real boost for me and my colleagues.”

### What an Investor says about recycling:

- “I don’t hesitate to call my local waste management company whenever I have questions about how to get rid of large items, paint, and dead branches. I want to dispose of it in the right way.”
- “We have a glass recycling center about a mile away, and I plan my route to work so I can drop off empty bottles.”
- “Our neighborhood dry cleaners is environmentally savvy. The owner has won awards for its eco-friendly

		cleaning process. That's the dry cleaner I use!"
<p><b>Four Recycling Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Writing letters to elected officials advocating for conservation legislation.</li> <li>2. Advocating for a zero-waste-to-landfill program at work.</li> <li>3. Investigating best practices for a rooftop garden in the neighborhood and assisting with plans for its development.</li> <li>4. Making phone calls to local food retailers who don't display recycling bins near the checkout counter or another spot where customers can easily deposit recyclable materials.</li> </ol>	<p><b>Four Recycling Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Structuring weekend outings around visiting a farmers' market.</li> <li>2. Prioritizing national parks when selecting vacation destinations.</li> <li>3. Adopting a family pet from rescue agencies or animal shelters.</li> <li>4. Teaching children at a very young age about the rules for recycling.</li> </ol>	<p><b>Four Recycling Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Growing organic gardens and using the produce at every meal possible.</li> <li>2. Placing a recycling bin in every room of the house where waste is discarded.</li> <li>3. Replacing plastic silverware with stainless steel (and volunteering to wash the dishes) in the breakroom at work.</li> <li>4. Installing energy-saving light bulbs in every fixture in the house.</li> </ol>

## DONATING AND SOCIAL IMPACT PERSONALITY TYPE

FIND FREEDOM AND JOY IN PASSING IT ON.

“Donating” means collecting necessities for people in need.



Activator



Connector



Investor

### What an Activator says about donating:

- “Donating is one of the best ways to mitigate excess consumption, which is such a big issue in our society.”
- “Before I donate anything, I call the charity to be sure it actually needs it.”
- “I am always impressed when a charity takes donated items and resells them to the public. It’s revenue for the charity to fulfill its mission, and it cuts down on waste.”

### What a Connector says about donating:

- “I can’t imagine not having a decent pair of shoes or a winter coat. I love knowing that I have filled that need for someone else.”
- “When my kids don’t finish everything on their plates or order too much at a restaurant, I remind them that food is a luxury for many people in our country and around the world.”
- “I’m usually the one who organizes the canned food drives for the office and our neighborhood.”

### What an Investor says about donating:

- “Donating is really efficient. You can give the organization exactly what it needs—no administrative friction.”
- “Companies that donate extra inventory to the charities are supporting the community effectively.”
- “Sometimes the only things a family needs to get back on its feet are a few basic necessities like food and clothing.”

<p><b>Four Donating Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Researching which types of canned foods are most needed to meet the nutritional needs of the people served by a charity.</li> <li>2. Encouraging an employer to make donations of excess inventory.</li> <li>3. Combining donating with other ways to do good, such as serving on a board or giving to a charity that supports a high priority cause.</li> <li>4. Making sure donated clothing is in good shape, and even sending it to the dry cleaners or making small sewing repairs before passing it along to a charity.</li> </ol>	<p><b>Four Donating Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Shopping for a whole family during the holidays through an adopt-a-family program.</li> <li>2. Setting aside one day every year to go through the house with the kids and gather up items for donation.</li> <li>3. Asking guests at a birthday or holiday party to bring an item of nonperishable food to donate to charity.</li> <li>4. Displaying the thank you notes from charities and the families they serve on the kitchen bulletin board for inspiration.</li> </ol>	<p><b>Four Donating Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Estimating the value of donated canned goods and clothing and tracking it for tax purposes.</li> <li>2. Going online to the websites of favorite charities and donating things from the “wish list.”</li> <li>3. Taking advantage of sales of nonperishable items at the grocery store to stock up on items to donate at a later time.</li> <li>4. Keeping a box of used clothing in the closet at all times and, when it’s full, taking it to a nearby shelter or donation box.</li> </ol>



## MARKETING AND SOCIAL IMPACT PERSONALITY TYPE

LIKE IT. LOVE IT. TELL EVERYONE ABOUT IT.

“Marketing” means promoting a cause to encourage other people to support it.



### Activator



### Connector



### Investor

#### What an Activator says about marketing:

- “In my opinion, if you aren’t willing to advocate publicly for the cause you love, you should really reconsider whether to get involved.”
- “I am very focused on the overall network of the charities I support and how they reinforce each other. Those are the messages I share with family and friends.”
- “I have connections with the media, and I use them to raise awareness about the causes that mean the most to me.”

#### What a Connector says about marketing:

- “As soon as I hear about a fundraising campaign for my favorite charity, I post something on my Facebook page.”
- “My kids and I all did the ALS Ice Bucket Challenge. Now that was having fun while ‘doing good’!”
- “I always post information about upcoming charity 5Ks and golf tournaments on the break room bulletin board at the office. I also put up posters in coffee shops.”

#### What an Investor says about marketing:

- “It takes money to make money in business, and the same is true for charities. Charities need to have at least a modest marketing budget to be able to sustain their missions.”
- “I look for charities that have added a marketing professional to their boards of directors. This means they not only gain professional oversight, but they also might have access to pro bono assistance.”
- “A charity’s website must clearly indicate how a donor can give money

		online.”
<p><b>Four Marketing Activities Activators Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Writing letters to potential donors, encouraging them to support a cause.</li> <li>2. Helping pay for and publicize a research study to identify the community’s most urgent needs.</li> <li>3. Assisting a favorite charity with communications strategies for demonstrating measurable success with the charity’s programs.</li> <li>4. Giving presentations about the importance of a favorite cause.</li> </ol>	<p><b>Four Marketing Activities Connectors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Sending a big batch of emails to friends and families to help a charity meet a fundraising goal.</li> <li>2. Regularly wearing T-shirts from charity sporting events.</li> <li>3. Making phone calls to help fill a table at a charity gala.</li> <li>4. Liking the social media posts and pages of every favorite charity.</li> </ol>	<p><b>Four Marketing Activities Investors Enjoy</b></p> <ol style="list-style-type: none"> <li>1. Paying for a favorite charity to get professional marketing assistance.</li> <li>2. Writing content for a favorite charity’s website.</li> <li>3. Giving a charity a list of names for it to contact about an upcoming event.</li> <li>4. Forwarding examples to a favorite charity of effective marketing campaigns going on at other charities.</li> </ol>

## SHARING AND SOCIAL IMPACT PERSONALITY TYPE

THE ORIGINAL PHILANTHROPY, OR “LOVE OF HUMANITY.”

“Sharing” means helping one particular person, family, or group of people you select.

Philanthropy is a lot older than 1917! “Philanthropia” is a word from the ancient Greeks that means “love of humanity.” For centuries, human beings have depended on kindness to each other. Interestingly, acts of philanthropy have not always been considered equal. More than 900 years ago, the biblical scholar Maimonides developed a hierarchy of philanthropic activities, rating activities on an ascending scale. At the low end are gifts made “reluctantly,” or “grudgingly.” At the high end of the scale are gifts that help others become self-supporting.

Check out Maimonides’ list below.

1. One who gives grudgingly, reluctantly, or with regret.
2. One who gives less than he should, but gives graciously.
3. One who gives what he should, but only after he is asked.
4. One who gives before he is asked.
5. One who gives without knowing to whom he gives, although the recipient knows the donor’s identity.
6. One who gives without making known his identity.
7. One who gives without knowing to whom he gives; neither does the recipient know from whom he receives.
8. One who helps another to support himself by a gift, or a loan, or by finding employment for him, thus helping him to become self-supporting.

In many ways, sharing is the “doing good original.” A classic social impact activity!

## WHAT SHARING MEANS TO THE THREE SOCIAL IMPACT CULTURE TYPES

Where would you fall on Maimonides' scale? Your self-assessment will give you a lot of insight into your Social Impact Personality Type. Read on for each Type's point-of-view on this early scholar's list:

1. One who gives grudgingly, reluctantly, or with regret.

**Activator:** "Regretting a gift is a shame."

**Investor:** "Your fault for making the gift in the first place."

**Connector:** "It happens sometimes...but just don't tell the recipient!"

2. One who gives less than he should, but gives graciously.

**Activator:** "Give what it takes to make a difference, whether you do it graciously or not."

**Investor:** "Giving in any amount is perfectly fine."

**Connector:** "The way you deliver the gift is even more important than the gift itself."

3. One who gives what he should, but only after he is asked.

**Activator:** "You should know the needs and not have to wait to be asked."

**Investor:** "Absolutely, you should be asked for your support. It's just like sales."

**Connector:** "I am honored when charities ask me to give."

4. One who gives before he is asked.

**Activator:** "Now you're talking!"

**Investor:** "Wait to be asked to let supply and demand work its magic."

**Connector:** "Everyone loves a surprise gift!"

5. One who gives without knowing to whom he gives, although the recipient knows the donor's identity.

**Activator:** "It is best to be sure you are giving where there is the greatest need."

**Investor:** "It does not make sense not to know where you are giving."

**Connector:** "I will find out who got the gift from the thank you note."

6. One who gives without making known his identity.

**Activator:** "Anonymous giving is an inspiration to people in need."

**Investor:** "That works."

**Connector:** "Ooh. That's a tough one."

7. One who gives without knowing to whom he gives; neither does the recipient know from whom he receives.

**Activator:** "This does not make sense to me."

**Investor:** "This does not make sense to me."

**Connector:** "This does not make sense to me."

8. One who helps another to support himself by a gift, or a loan, or by finding employment for him, thus helping him to become self-supporting.

**Activator:** "This strategy rocks!"

**Investor:** "This plan rocks!"

**Connector:** "This person rocks!"

## CELEBRATING AND SOCIAL IMPACT PERSONALITY TYPE

EVERY MINUTE IS A GIFT.

“Celebrating” means supporting favorite causes by showing up at events.



Activator



Connector



Investor

### **PARTY TIME!**

By now, you no doubt have a pretty good handle on the factors influencing your Social Impact Personality Type. You probably also have a new appreciation for all of the ways you are making a difference in the lives of other people through your social impact activities. You are doing a lot of good. Now it's your turn to celebrate!

Take a few minutes to jot down all the ways you do good on a blank sheet of paper, numbered 1-10. You can list the 10 Ways to Do Good in whatever order you like. (Check out a sample of a checklist we created for one of our workshops.)

But it doesn't have to be that formal. You can jot down your Ways to Do Good just about anywhere—on your phone, on the back of your to-do list, or on whatever scraps of paper you find in your desk drawer.

Look at all that good! Make your own list now, tomorrow, and whenever you want to feel better. You are doing a lot more good than you know—so know it!

Think you know your Type? Here's what each Social Impact Personality Type might say about celebrating.

<p>“I love the feeling of knowing I have made a difference. That’s what’s on my mind when I am running the 5K to honor my favorite charity.”</p>	<p>“When I am with other people who support my favorite cause, I am energized. I know I belong.”</p>	<p>“The charities I support are so smart about their special events. They raise money and awareness, efficiently. I am proud to support the cause.”</p>