

# ASSOCIATION OF SMALL FOUNDATIONS

*for foundations with few or no staff*



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# Creating a Mission For Your Foundation

## *Setting a Course Meaningful to You*

**M**ost individuals who start foundations have been generous with their time and donations for years before the foundation is created. They have written checks to their favorite charities, established funds at community foundations, and volunteered their time. When they begin their foundations, they continue their traditions of giving.

Some donors find, however, that giving through their foundation is different from their previous experiences. It is common to hear donors describe their early years of grantmaking as, "all over the place"; "doesn't have an impact"; "unsatisfying." Some say the freedom they wanted just "doesn't add up to anything."

After a few years, these donors start longing for some focus or purpose to their giving. What has changed?

Foundations add a new dimension to philanthropy that changes the experience of giving. For some donors, this new dimension is the sense of permanence foundations bring; for others it is the regular cycle of giving each year. It can also be the dynamic of involving others in the giving—children, parents, siblings, or close friends and advisors.

To bring some order and purpose to their giving, many ASF members decide to create a mission for their foundations. The mission is a statement that communicates what you seek to achieve through your foundation's grantmaking and other program activity. While it is only a few sentences, a mission has tremendous power to focus your foundation for impact and give you momentum over time.

Have you ever wondered about creating a mission? Are you interested in creating a mission but are not sure what the benefits are, or how to go about it? If you have a mission, do you want to make it more focused? If so, this article is for you!

### Mission Is Not for Everybody—That's OK

Foundations have perfectly good reasons to function without a clearly defined mission. Many donors desire to keep their options open and be flexible, or give to a range of causes. Missions are not required by the law.

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ASF recognizes that some of its members may not be interested in creating a mission. That's ok!

## Benefits of Creating a Mission

A simple, heartfelt mission for your foundation allows you to:

- ◆ Make the best use of your resources by focusing grants and activity on a specific issue, thereby increasing the impact of your dollars and your time.
- ◆ Create grantmaking guidelines, which communicate your interests and your application process to grantseekers.

## Myths about Mission

*Larger foundations and staffed foundations are the only ones that have missions.*

ASF members of all asset sizes have missions, and members with no staff have missions. No special training, and no special assistance is necessary to create a mission. All you absolutely need is some time to reflect, walk around your community, or talk with someone you trust about what interests you. And you can communicate your mission, and grantmaking guidelines, by creating a simple one-page information sheet for your foundation, and copying it for a few dollars.

*A mission will restrict me too much.*

Foundations use missions to guide grantmaking, but nothing prohibits a foundation from giving beyond its mission (it's perfectly legal, too). Foundations go beyond mission to take advantage of terrific grantmaking opportunities, or to help with emergencies. Many others set aside a portion of their grantmaking each year for board members to give in a discretionary way, and some of this giving falls outside mission.

*A mission will bring me public exposure, and more grant requests.*

Communicating your mission may increase public awareness about your foundation, but it is likely that you will receive fewer grant requests, since grantseekers know your program focus.

- ◆ Save time and money by reducing the number of proposals you receive, and helping you prioritize the ones you do according to your mission and guidelines.
- ◆ Build cohesiveness throughout your foundation. Because a mission articulates the central purpose for the foundation, you can use it to shape and design almost every facet, so that everything is working toward a common purpose.
- ◆ Train next generations by communicating your values, hopes and aspirations.
- ◆ Have a more satisfying experience running your foundation. You will see more impact, accumulate experience in a particular area, and be doing something that is meaningful to you.

A mission sets your foundation on a particular path. Over time, you will be able to:

- ◆ Accumulate experience, knowledge, and contacts in a funding area.
- ◆ Assess the progress of your grantmaking and your foundation, and make adjustments to stay on track.
- ◆ Target your dollar and non-dollar resources over years for maximum impact.
- ◆ Enjoy the learning and discoveries that come from having a focus, a specialty.

## Examples of Missions

A mission should be clear and concise—a sentence, or a paragraph. Some missions include the target audiences for grants; a geographic focus; a statement describing the foundation's nonprofit status; and the history of the foundation. Here are a few examples:

*The focus of the Foundation is the enrichment and empowerment of children and youth—under the age of 19—so as to prevent exploitation, poverty, and injustice.*

— The Susan A. and Donald P. Babson Charitable Foundation, Boston

*The Ann Campana Judge Foundation exists to promote, undertake, support, and fund philanthropic projects in and relating to developing countries that focus on water, health, sanitation, and student involvement.*

— Ann Campana Judge Foundation, Albuquerque, New Mexico

*We are dedicated to supporting education, preserving and protecting the environment and fostering opportunities for leadership, with special consideration to our heritage in Central Illinois.*

— Lumpkin Family Foundation, Mattoon, Illinois



Note how brief these missions are. The power of a mission comes in part from this simplicity—from the ability to be communicated easily to the community and to everyone working on the foundation.

### The Power of Going Deep

The simplicity of a mission, however, often conceals the hard work donors do—work that involves carving out, from the myriad possibilities to do good in the world, something that has personal meaning.

To create a mission, donors draw upon some of their most intensely-held values, hopes and aspirations for their community and for society. For some, considering what is meaningful takes two hours; for others, this process can be a journey that lasts two months.

However long it takes, going deep offers a double payoff. It helps you craft your foundation's mission, and it also connects your foundation with your own (or your family's) deepest values and aspirations. You will achieve more, be more creative, look for more opportunities to make an impact—simply because you will be doing something that is important to you.

### Creating a Mission

To create a mission for your foundation, the key question to ask is: "What do I wish to accomplish?"

#### 1) Questions to Help You Think and Reflect

What are some of the most pressing problems in my community? What makes me angry? What would I like to change?

## How Mission Can Help Maximize Impact

In developing the mission, the board of the Sunflower Foundation in Topeka, Kansas recognized from the onset that its resources would only go so far in improving the health of Kansans. As a result, they began to envision the foundation as a catalyst with a focus on understanding root causes, building capacity and looking for opportunities for change at a systems level. The resulting mission statement—"To serve as a catalyst for improving the health of Kansans"—is the driving force behind the foundation's grantmaking and evaluation activities.

## Mission as Roadmap

According to Betty Vernon, program director of the Cailloux Foundation in Kerrville, Texas, the challenge was making the foundation's mission succinct. But once it was created, it guided the foundation's direction. "It's so important for a foundation to have a roadmap; it helps grantseekers understand why the foundation can or cannot fund them; and it helps you figure out where you want to go and what you want to accomplish."

What are some of the most inspiring opportunities in my community? What would I like to nurture, grow or bring about? What possibilities excite me?

Has an event or experience touched me or my family in a deep way?

Is there a family member or friend I would like to honor?

Among past experiences in giving and volunteering, is there a particular issue or cause to which I keep returning?

#### 2) Techniques for Thinking and Reflecting

Donors have different styles of doing the reflection and thought that goes into creating a mission. Some think best alone; others think better while talking, observing and exploring. The following simple techniques can be effective:

*Walk or drive around your community* to talk with a variety of people about problems, needs, opportunities. Meet staff and volunteers at nonprofit organizations; people who research or write about your community at local government agencies, colleges, and newspapers; community leaders; parents and school children; elderly citizens. Your discussions might uncover or highlight an unmet or under-served need or opportunity, and spark the idea for a mission.

Example: ASF knows of donors who decided one day to take off in their car and drive around their rural county in search of ideas for a mission. They stopped at a rescue squad, talked with the staff, and learned that the state had made deep cuts in the budget for rescue equipment. This need made a big impression on the donors, and they ended up establishing as their foundation mission

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the purchase of emergency rescue equipment for their region.

*Find someone to "interview" you about what is meaningful to you and what you might like to accomplish with your foundation. Many people find they can think and reflect better by having a trusted friend, advisor or family member engage them in a conversation. Some donors engage a professional life coach to have this kind of deep, values-based discussion; their assumption is that someone "disinterested or impartial" will help them consider all possibilities.*

## The Role of Mission in Involving Family

While most missions are developed to advance some area of community need, you can also develop a mission around the goal of involving family members in the foundation, or instilling charitable values in next generations.

Jean Buckley of the Tracy Family Foundation in Quincy, Illinois notes, "Our mission statement captures the essence of Mom and Dad's (First Generation founders) value system. It is a reminder of what our parents stand for. As time marches on and memories fade, our mission statement will continue to serve as a guide for both current and future generations."

Some foundations make family goals part of their overall mission statement. Articulating such goals can be useful in emphasizing to all family members that this is an important and intentional goal of the foundation's work. Here is an example of a family-oriented goal from an ASF member:

*The Foundation will provide a forum for family members to affirm their core values, honor a common legacy of community service and contribute their talents to accomplish shared goals.*

— Excerpt from vision of the Lumpkin Family Foundation, Mattoon, Illinois

*Carve out some quiet and unhurried time for yourself to reflect upon your values and aspirations; what has made a difference in your life so far; and what this might say for your foundation mission. Some donors like to do this away from their usual surroundings (and away from the phone and computer!). Bring some paper and a pencil; don't hurry yourself; and give yourself time and space to dream.*

### 3) Tips for Writing Your Mission

Once you have determined a program goal for your foundation, and/or a family goal, try writing a draft of your foundation mission. Give yourself time to write and re-write until you are satisfied with it. Consider these tips:

- ◆ Begin by jotting down a few words and phrases that convey your top values, hopes and aspirations.
- ◆ Keep your mission brief—a sentence or a paragraph. Conciseness helps give your mission power—the power of being communicated easily.
- ◆ Make the mission as specific as you can.
- ◆ Remember that your mission does not restrict you—legally or in any other sense. Give yourself the freedom to be specific, knowing that if you find a great opportunity to grant outside your mission, you can.

If you are involving family members or others in crafting a mission, make sure the mission reflects the values and hopes of all the individuals involved. Take time to have discussions that will draw out everyone's thinking and achieve consensus. A facilitator can be helpful to guide the discussion.

For more information on how to create missions, contact Andy Carroll at ASF, or see ASF's *New Foundation Guidebook* and *Foundation in a Box*. Also, an expanded version of this article will be available as an *ASF Primer* this fall. ◆