



WRITING A STATEMENT OF DONOR INTENT FOR FUTURE GENERATIONS

One of the most challenging issues in maintaining the donor's intent is to anticipate long-term changes in the environment relative to the donor's mission. This is why donors carefully craft their intentions. We cannot accurately anticipate what challenges future generations will face, and significant changes in the world can render original plans meaningless. The task then, is to structure the intent so as to be effective, yet responsive to both current conditions at the time of writing, and conditions that future generations will have to interpret to sensibly apply the philanthropic dollars with confidence.

Things to consider in designing an effective statement of donor intent:

- ❖ Some experts believe that current events are, in fact, so critical to the success of philanthropy, that it is wise to limit the term of the fund in order to reduce the long term effect of cultural evolution on an originally excellent idea. Depending on the nature of the goal, this could range from ten years to more than 50 years.
- ❖ The donor's priorities should be stated broadly at first, articulating in detail the donor's values and overall philanthropic goal, and then logically prioritizing objectives according to today's identified needs. Explanations on how each priority specifically addresses the overall goal are most helpful. Careful articulation will prevent diluting the donor's intent in the name of "modernization" by future generations. If the donor's wishes are articulated well, future generations will more easily adapt to current conditions while maintaining the donor's intent with integrity.
- ❖ That said, it is also important to consider the fact that the clarity of intent will reflect the level of responsibility that lies with the future generation. Structuring the fund so strictly that there is essentially no need for others to take responsibility does not aid in the development of the future generation's philanthropic attitudes or skills. On the other hand, many inheritors struggle with guilt as they attempt to execute on "what he/she would have wished" because the intent is unclear. Here is where articulating the donor's *values* becomes more important than articulating the goals.
- ❖ When identifying philanthropic goals, address the following:
 - Investment policies or goals
 - Causes (child development, the elderly, environmental issues, poverty, etc.)
 - Types of charities (religious, charitable, schools, community foundations, research, policy, direct service providers, etc.)
 - Areas of interest (K-12 education, housing, food, performing arts, etc.)
 - Structure of contribution (general support, program support, scholarship, capital, endowment, etc.)
 - Geographic region (local, state, regional, national, specific international regions)

- ❖ Also consider documenting what areas or activities the fund should *not* support, and *why*.
- ❖ If the donor wishes to pre-select specific charities, the intent should be clear on why they are selected, so that if the organization dramatically shifts its mission or activities, or unfortunately dissolves, the future generation can adeptly respond with clear consciences and legal recourse.
- ❖ Consider the use of multiple forms of expression to record the donor's values and intent. Options include formally written statements, intimate letters, video interviews of the donor, or journal entries by the donor.

In the end, you are trying to find the golden mean between two extremes, which is never easy. State clearly and boldly your goals and the vision you have for the funding. Suggest examples of activities in today's culture as an example of how you would work toward achieving your goals. At the same time, leave some room for future generations to adjust to the realities of a changing world.