

# How to Write a Mission Statement

A good Mission Statement is the foundation of a successful organization. It should embody the organization's core values, its central goals, and the actions that the organization will take to get from values to goals.

The same logic applies to a donor advised fund. A Mission Statement serves as a reminder and a guiding light about the ends it's meant to serve, whether for a corporation, a family, or even just yourself.

Ideally, the process of writing the Mission Statement should involve actively thinking through these fundamental ideas. While you may feel these essential values in your bones, writing demands a specificity and concreteness that will force you to discover what matters the most to you.

## Take stock of your philanthropic values.

Where and how do you believe your philanthropy can make the most meaningful impact on the world? This is a question that draws not only on abstract belief but on experience. In many ways, the answer reveals itself to us over time as we compare expectations to our subsequent experiences.

### Take Your Time

Before you start to write, give yourself the space to reflect back on your philanthropic and personal experiences, to sift through and evaluate them.

To aid you in the process, we recommend filling out the Values Questionnaire and then the Strategic Questionnaire. Answering these should help you think through some of the following important questions:

- Where have you given before? Looking back, how do you feel about those donations and experiences? What feels like a success? What, if anything, would you like to do differently?
- What are some issue areas where you feel that your philanthropy could make a big difference?
- What are the most important values that you would like to manifest in the world?
- How do your values and issues connect?

### Talk With Those You Trust

- Friends, family, and advisers can all be important sounding boards for your own reflections.
- Ask them about their impressions of you, in addition to their own thoughts and values. When have you seen me most energized? What consistent threads have you seen in how I approach philanthropy?

### Gather Materials and Inspiration

- Read examples of mission statements from some of your favorite organizations and take note of statements or elements that resonate with you.
- Read or reread any written works on philanthropy, philosophy, or basic human values that you find meaningful.

## Write—a lot.

### Preparatory Exercise

- List your chosen values
- List your chosen issues
- Describe the difference you wish to make
- Describe the connection you see between your values and issues

### Writing the Mission Statement

Free yourself to write a lot of material—sentences, fragments, words. Focus first on generating and leave yourself lots of possibilities—cull promising words, phrases, and ideas that feel resonant and meaningful as you go.

Next, start to shape it into a more direct statement. Again, give yourself freedom to go long and allow your first few drafts to be imperfect.

In your final drafts, hone in on what you want. Make sure the language is active, direct, and concrete.

The statement should:

- Set the direction for the organization
- Connect values and issues to action
- Define the mission for staff, the board, funders and grantees
- Inspire people to take action
- Describe the needs you see and how you aim to meet them in positive, active terms
- Appeal both to emotions and to logic

Here is a sample mission statement for a fictional organization:

*Guided by our belief in justice and the value and potential of every individual, XYZ Family Foundation supports community organizations in underserved communities in Los Angeles County to develop local leaders and effective solutions to dismantle structural inequality in the field of public education.*

## Gather Feedback

Show your draft statement to your trusted circle, including your Relationship Manager, and to respected outsiders for their feedback. Ask them questions to make sure the statement as they understand it is the statement you hope to make. Revise accordingly.

Mission statements can also evolve and change over time. You have the flexibility to revisit this process as new needs or interests arise. We recommend reviewing your mission statement every 3 to 5 years or sooner if needed.

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Please feel free to contact your Relationship Manager or the Donor Relations Team at [donorrelations@calfund.org](mailto:donorrelations@calfund.org) if you have any questions. We are here to help.

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