



Use your charitable giving to create a legacy of exceptional results

Giving is highly personal: it allows you to express and act upon your values. When you explore your deep personal or family convictions, create a vision and focus your giving, you'll build a clear connection between *what you value* and *what you achieve*.

Family charitable funds become powerful tools for family unity and for community good. They are an instrument to translate values and beliefs into concrete and lasting impact.

Through their giving, ordinary people become social entrepreneurs – making change through their catalytic philanthropy. You can solve problems and build success in your own back yard, your state or on a regional, national or global scale.

We can help you plan your giving to achieve the impact you want to have in the world.

We encourage you to distill your *giving philosophy* around your passions, values and goals. Then develop a *giving strategy*

that will have impact consistent with this philosophy – whether it's child health, poverty reduction, literacy, animal welfare, the arts or other purposes.

Through your deep well of commitment and caring, you can take on critical community projects that government cannot or should not address. Private donors and the organizations they fund have the freedom to take risk, use unconventional solutions and partner with businesses and groups in a climate free of political barriers in order to achieve success.

Commit to a cause

Rather than sprinkling modest gifts across a range of local issues, donors have more impact when they concentrate

on a particular issue. Donors who pick a strategic focus are able to achieve more than those who scatter their attention and funding.

Families can develop a giving philosophy or strategic focus by discussing their values, then brainstorming a list of potential funding directions. Give and take will be required to reach agreement on a few causes from among these choices. This discipline of honing in on one or two will be challenging, but worth the investment of time and discussion. The process of consensus-building can unite the family while igniting passion and determination.

Families might focus their funding on a community or geographical area, a

particular area of gratitude or responsibility or specific social or environmental objectives. For other donors, the issue that matters most might stem from a personal life experience.

A family might decide they would like to focus their funding on services that help seniors in their community stay in their homes as long as possible. They might set a vision to provide arts and culture experiences to kids who would otherwise not be able to afford or take part. Or they might set a goal of empowering women and girls.

A final consideration may be finding an organization that matches your personality or way of thinking. For example, entrepreneurs may prefer an organization that works in unconventional ways, challenging the status quo in search of breakthrough progress. Others will prefer proven programs with known success. A tech-savvy family might prefer an organization that harnesses the power of the web or other emergent technologies to leverage impact.

Now it's time to dream big

I encourage you to express your vision as a bold dream. You can get down to specifics and details later. Create a vision of what would happen if money were no object or resources were abundantly available.

For example, a family might have this ambition: "All children in XYZ community are able to explore their interests and discover unique talents by taking part in any extracurricular activities." Or it might be: "Healthcare services will be offered in our community into

perpetuity through the funding of salary subsidies to recruit trained and skilled professionals."

With your vision, now what?

The next step is conducting an environmental scan of groups doing work in your chosen focus area. Which ones are having the most impact? As you consider different groups, evaluate how your funding might take their services to an exponentially-higher level.

Pick one, two or a handful of organizations making a difference, make a site visit and ask them: *what is necessary to produce dramatically better results?*

Would your funding allow them to scale their services to serve vastly more people? Could the program operate for more hours or enter whole new neighborhoods? What ways might your funding make the best organizations that you have found become even more impactful? What innovative solutions might they try?

During this process, I encourage you to take advantage of our foundation's strong knowledge and close collaborations with the region's many charities in reviewing missions, causes and programs. We help you meet and explore organizations making strides in focus areas, and tap our nonprofit network to learn about new ideas and projects.

Your due diligence can include meetings with nonprofit directors, visits with board members or clients that are served. You may review progress or success reports, and hold discussions

with experts in your field of interest. Look for exceptional leadership, adaptive strategies, accountability, and program innovation and results. I encourage you to be every bit as engaged and zestful in this process as you were in the pursuits that accumulated your wealth, so that your giving realizes similar return on investment.

Many excellent books have been written on how to give smarter. We are happy to share from our extensive library to help you in your giving.

With \$95 billion forecast to be given to charities in North Dakota alone through 2061, we are building our resources and assistance to donors so they may be exceptionally effective and fruitful in their giving.

Our goal is for you and your family to experience the full rewards of giving by defining your values, creating a vision and achieving more strategic, higher-impact giving.



Pat Traynor has been president of Dakota Medical Foundation since 2000. He led the formation of the companion Impact Foundation in 2005.

His own family established a charitable fund, the Mack V. Traynor MD Scholarship Fund, in 2004 in honor of their father to commemorate his lifelong commitment to delivering high quality healthcare services to his patients.