

# Mixed Motives

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Understanding why we give may help us feel better about the way we give.

There's an old Yiddish saying: "He who has money is handsome and intelligent and sings well, too." In other words, nothing is easier than writing about the generosity, vision, and wisdom of those who give away money. But praise tends to obscure any real understanding of the motives behind our philanthropy.

Several years ago, I began to examine my own giving more closely, to see what it said about my values and priorities. I knew some set of principles must subconsciously underlie my philanthropy—if I could only think clearly enough about how I made my decisions.

I decided to let the dollars speak for themselves. I took out my checkbook and listed the contributions I had made during the last five years. I added the grants made by the three foundations on whose boards I serve. Then, on a cross-country airplane flight, I tried to make sense of my cumulative giving.

Try as I might, I couldn't explain my grantmaking in any systematic way—until I began to sort out my grants, dividing them into different 'baskets.' To my surprise, I found that the decisions I unthinkingly lump together as charitable giving break out into three separately motivated types of giving—obligatory, social, and strategic.

What I call "obligatory giving" arises from a sense of duty to the communities I identify with. For example, I consider myself a member of the Jewish community in Boston, so I support the community fund. I also consider myself a member of the secular community, an alumnus of my college, a parent involved in my children's schools, a fan of public television, and so on. Because I have access to more resources than most, I feel obligated to support these communities through whatever charitable organizations come calling.

This sense of obligation can apply to foundations, too. As a trustee, I recognize that a foundation is itself a corporate citizen. Its obligations may be geographical or mission-driven, reflecting the values of its trustees or founder, but it too makes grants out of a sense of loyalty to certain communities.

Even as a trustee, I have learned not to put much effort into evaluating obligatory grants. My contribution is meant only to sustain the community, so the accountability I look for is very limited. I'd like to know that the support I give is effectively spent, but I would not inquire further. And in the case of schools or cultural institutions, the organization itself defines the community. Either I support it or not. There is no way to direct funds to an alternative charity that does a better job.

The second category I discerned was that of "social giving." Certain of my gifts could be explained only by who asked for them. The actions may be philanthropic, but the motives are social.

A good friend asked me to support the Boston Zoo. It was a cause I neither knew nor cared about. But I gave out of friendship—it was a request I couldn't decline. Other social grants might be given in return for a contribution made at my request, or to honor an obligation to a business associate. Such grants are more *quid pro quo* than philanthropy, and are rarely mentioned in the polite rhetoric of the field. Yet every donor knows them well, and every fundraiser understands that business or social leverage is a primary tool of the trade.

In this category I also include gifts to organizations whose boards I would like to join. Some boards are terrific and prestigious clubs—filled with socially prominent, stimulating people and useful connections for (to paraphrase Microsoft) wherever you want to go today. These are communities of which I am not yet a member, but would like to be.

Ultimately, these gifts are not motivated by the charitable organization's work, so I put very little effort into accountability and evaluation. I didn't become involved with the zoo myself; rather, I relied on the friend who asked for the grant to see that my gift was used well.

Grants in the final basket, "strategic giving," are different: these grants are motivated by my strong personal commitment to certain causes, and they are meant to effect change in the world. In all probability, they are related to my communities of interest, but unlike obligatory grants, I give them from my enthusiasm, knowledge of the field, and belief that my donation can make a meaningful difference.

Since law school I've believed strongly in the value of legal clinics, which allow law students to represent real clients under faculty supervision. So, on behalf of a foundation, I approached a local university with a grant to expand its clinic, providing for new space, an endowment, and an advisory council. As with other strategic grants, we worked closely with the organization. We met often with the dean, faculty, students, and the architect of the new office; I chaired the advisory council during its year of meetings and helped shape the thinking of the law school.

Evaluation and assessment are key to such strategic grants. I investigate these grants carefully, monitor them, request reports, and even influence their direction. I might help raise additional funding, if required, or call in my quid pro quo from other potential funders. If the project has been successful, as the legal clinic grant has been, I will look for ways to build on it with further funding. If not, I learn my lessons. But either way, I care enough about the project to follow through on the results and to use that knowledge in future funding decisions.

Since discovering these different baskets of giving several years ago, I have found them immensely helpful in evaluating grants. I now deliberately allocate my annual giving as a percentage among these three baskets, and have steadily increased my share of strategic giving. Yet I have resisted the temptation to rank one category above another.

Each basket is a legitimate component of my philanthropy. My strategic grants are specific, change-inducing, and carefully monitored. Yet I can spread myself only so thin: These causes take a great deal of time to investigate, understand, and monitor. Many never produce the results I hoped for. If I limited my philanthropy to strategic grants, I would be making many fewer contributions each year, affecting a much narrower field, with a significant risk of unsuccessful initiatives.

Similarly, it is easy to downplay the importance of obligatory or social giving. Yet our society is filled with interdependencies and inequalities: Considerable progress is made, and suffering alleviated, by the communal institutions that surround us, and they depend on our support.

Nor are our social connections any less a part of the fabric of life than our institutional ones. Giving to a charity for the sake of a friend honors that friendship and strengthens that bond. And those bonds make a difference: Much of what we can accomplish comes from the strength of our associations with friends and business acquaintances. My friends and colleagues are committed to their passions and priorities as strongly as I am to mine—I help support theirs, as they help support mine—and at the core, I recognize that all our causes fall within the boundless mandate of philanthropy.

Along the way, I have learned to stop thinking of grants in the more traditional categories of seed funding, operating support, endowment, or capital campaigns, but to rely instead on differing internal motivations. The distinctions are entirely subjective, neither rigid nor mutually exclusive, and my grants often cut across categories. Yet I have found greater clarity in my decision-making than ever before. I see immediately into which basket, or baskets, a given request falls; within each category, I make decisions on a more consistent basis. At times, I understand more clearly how other trustees are thinking about grant requests at our meetings. I know when to put effort into evaluation and assessment. And I take more pride in my giving by understanding its true motivations.



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