By using a range of tools and frameworks, individuals and organizations can refine and optimize their philanthropy approach, enabling them to make a greater impact and achieve their giving goals more effectively. These tools include methods for measuring impact, developing strategy, and building collaborations, all of which can help you to give more strategically and drive positive change in the causes and communities you care about.

Identifying and Setting Goals for Your Philanthropy

Once you've identified the motivations that will drive your philanthropy, the next step is to narrow your focus and set your goals. This will require you to think more deeply about the issues that interest you. The fields of education or social justice, for example, are vast.

Where do you start when thinking about how to focus your efforts? Knowing the different frames of reference for philanthropic approaches and understanding the landscape are core to this process.

Understanding how to frame issues will help you in preparing funding program criteria and guidelines. This will help you and other decision-makers clarify how you approach your selected issue areas. There are several concrete steps you can take to start this process.

Get an Overview of the Issue Area(s)

For many donors the question is whether to focus on one or many issues. This decision can be complicated where there is more than one decision-maker – a couple, a set of siblings, a parent with adult children, even grandparents with adult children and teenage grandchildren, and board members. Multiple decision-makers often decide upon multiple issue areas and that means a team effort is required to find a clear philanthropic focus.

The first step in framing your focus is to ensure you understand the basic considerations and challenges within your chosen issue area(s). There are many resources available that can be utilized for this, including the RPA Topic Briefs as well as resources available through philanthropic associations such as the National Center for Family Philanthropy.[3]

[3] https://www.ncfp.org

Consider Potential Lenses

There are a variety of ways philanthropists can address a particular challenge. You can take a broad or narrow view, work through policy channels or direct service, engage with specific communities or groups of people, or focus your initiatives on a particular geographic area. Each of these overlapping lenses is explored below.

Specific Challenges

Some philanthropists choose to operate on a big, broad level, while others are more comfortable focusing on something specific that they may later develop into a broader program. Examples of a focused approach include:

- Funding research into bipolar disorder as opposed to working in mental health in general
- Preschool arts education programs instead of general education funding
- Meditation programs for incarcerated adults versus working on prison reform in general

Projects are another example of taking a more specific approach. Consider, for example, a project that:

- Deploys philanthropic dollars to support under-resourced high school students to attend college
- Helps create a teacher pipeline more reflective of the student body
- Provides after-school programs and activities for students whose families can't afford these enriching activities

People

Another possible lens is looking at the types of people you wish to support. Some examples of these groups include children, women, the elderly, youth, artists, refugees, and innovators. The point here is to focus on people who fit a particular set of criteria and then work with that group on their self-determined opportunities or issues.

The ways in which a specific group is served can include all aspects of their lives and may or may not be limited to what they have in common.

Places

The definition of place can be anything from a continent or region to a village or neighborhood. After examining motivations and values, some donors realize they'd like to tether their philanthropic efforts to a physical place and may fund many "subject" areas in that place. If you happen to live in your place of focus, you may find joy through learning about your community from a different perspective.

Moreover, getting connected and involved in a particular city or neighborhood can be a rewarding way to contribute more than philanthropic dollars, and you may enjoy volunteering your time in your community.

Institutions

Funders who focus on "institution building" seek to achieve their philanthropic goals by supporting a certain kind of organization and the role it plays in the world. The institutions in this category can include policy and advocacy organizations, museums, ballets, orchestras, charter schools, or colleges.

Policy

Just about any challenge that philanthropy can address has a policy influence behind it. A policy challenge in education, for example, is that public school funding in many parts of the United States is largely dependent on local taxes, which are tied to the value of real estate in that local area. A policy approach to this issue might be to work to change the way funds are allocated.

Systems Change

Changing the systems that have created the current policies or circumstances is yet another lens through which you can view their engagement.

A system is a collection of elements, processes, or components that work together for a common purpose, or cause an outcome. "Systems change" in philanthropy is a phrase used to explain an approach that targets the root causes of social issues instead of directly tackling the issue itself.

Regardless of whether a system is intentional or de facto, natural or man-made, tangible or theoretical, systems operate synergistically so changing a system therefore requires an analysis of its parts and how they interact with each other.

A simple metaphor for this framing is a child drowning in a river. Do we support the drowning child with a life preserver or do we prevent the drowning from happening in the first place? Prevention can be done by providing swimming lessons, reducing river access, providing alternate activities for the children, or any number of suggestions from the community.

Conduct Research

Once you have decided on a focus area, the next step is to investigate it further by conducting a landscape scan. Landscape scans can be either quite broad or very focused. These scans can identify potential gaps, overlaps and trends. Moreover, they can provide information about particular initiatives or projects that you can learn from, collaborate with or join.

There are many ways to conduct landscape scans, and your approach depends on your budget, where you are in relation to your understanding of the issue and landscape, the amount of time you have, and your operating style.

Ensure that you first see what types of information already exist and so avoid reinventing the wheel. You can hire a consultant, get input from associations engaged with your issues through listservs or surveys, reach out to individuals directly, hold focus groups, conduct research, or any combination of the above.

The key to any successful landscape scan is clearly identifying the questions you want answered. Additionally, a thorough landscape scan will necessarily involve the engagement of those closest to the community you seek to impact. Finally, it is imperative that as you conduct the scan, you acknowledge that you don't have all the answers so that you can appropriately challenge your own assumptions.

Some simple questions you may want to answer in a landscape scan include:

- What are key problems facing this issue area?

- What are the root causes of those problems?

- What organizations, and types of organizations, are involved in this issue area?

- How are those organizations involved, and in which communities?

- Who are the experts in this area?

- What other philanthropic entities are involved, and what types of resources are they dedicating to addressing the issues in this area? What are their approaches?

Panda CommUnity Fund – A Long History in Philanthropy

The founders of Panda Express, the Cherng family, have a long history in philanthropy. Panda Express is a family-owned business in which the family are very active, and their philanthropy reflects this mindset. As Michelle Cherng Lee, who is a family advisor to philanthropic efforts, notes, "At our core, we are a family of entrepreneurs. By our nature, that means we want to be hands-on and we want to help."

Panda Express is an American-born company founded by Chinese immigrants that appreciates the grit and resilience required to overcome adversity. As Lee explains, "When presented with two options, my dad usually picks neither, meaning that he wants both to happen."

This mindset is reflected in the family's three grantmaking organizations: the Panda Cares Foundation, the Panda CommUnity Fund and the Panda Charitable Family Foundation. Glenn Inanaga, Chief Administration Officer of Cherng Family Trust (CFT), says key values include intellectual curiosity, the spirit of giving and lifelong learning. "These entities weave together into a tapestry of approaches and focus areas."

However, despite the broad approach, focus is critical. Lee makes this clear: "We can't be everything to everyone, but we can be true to what we promise." By setting up boundaries and making sometimes hard decisions, she explains, there is potential for deeper and more meaningful impact.

By remaining grounded in values and setting out concrete strategies and expectations from the beginning, the Cherng family has been able to successfully manage the wide breadth of giving that their philanthropy encompasses.

Overview of the Panda CommUnity Fund

The Panda CommUnity Fund is a $10 million community investment and response program that supports immediate and sustainable solutions from national and local organizations to uplift diverse groups, including people of color and other marginalized communities.[4] Created in response to the race and discrimination issues happening throughout 2020 and 2021, the fund has three pillars that allow for a structured, broad focus: Helping Today's Hurts, Cultivating Awareness and Empowering Representation.

The pillared approach allows the CommUnity Fund to react to current events and support movement building, while also providing sustained support to organizations like the Angel Island Immigration Station, The Asian American Foundation, the Taft Museum, StoryCorps and other important cultural institutions. The three pillars also include separate allocations for broad DEI programs, serving the BIPOC and other marginalized communities. "We are proud of our multicultural heritage and have always believed that this identity connects us to the best of American culture. Because of the duality in who we are, Panda champions a greater sense of belonging and supports engagement efforts that reflect the diversity of our guests, associates and communities," says Peggy Cherng, co-Founder and co-CEO of Panda Express.

Emphasizing Trust and Learning

Panda Express has a long history of uplifting diverse communities through its corporate and community-building efforts with social justice organizations such as Asian Americans Advancing Justice Southern California. The Panda CommUnity Fund takes that support to the next level by taking risks to fund innovation and implementing general operating support. As Lee explains, "We knew our motivation but we didn't realize how much it was a true reflection of who we are and how much we would learn along the way." Throughout all of the Panda grantmaking organizations there is a strong focus on learning from the organizations that they are supporting and finding out how to best advance the work that grantee partners are already doing. As Inanaga explains, the family has a philosophy that "the way you do anything is the way you do everything." He notes that the values-based approach has proven to be successful, and the family hopes their learning will continue.

> **"We are proud of our multicultural heritage and have always believed that this identity connects us to the best of American culture. Because of the duality in who we are, Panda champions a greater sense of belonging and supports engagement efforts that reflect the diversity of our guests, associates and communities."**
>
> **Peggy Cherng**
> Co-Founder and co-CEO of
> Panda Express

---

[4] https://www.prnewswire.com/news-releases/panda-express-reinforces-its-commitment-to-uplifting-communities-with-a-10-million-pledge-to-diversity-equity-and-inclusion-301284530.html