

Exercise 7.1
Your Giving Plan

30 minutes or more

This exercise will help you create an integrated giving plan using Worksheet 7.1. Or, if you prefer, translate these questions into a drawing, chart, or spreadsheet that works for you. These questions draw on the exercises from previous chapters. Once you have completed integrating the answers here, Worksheet 7.1 consolidates the information, providing a big-picture view of your plan. (To see what a completed giving plan looks like, see the sample giving plans that follow these instructions.)

Name: _____

This plan is for the following year(s): _____

Step 1.

A. List the values that shape your giving plan.
(Refer to Exercise 2.3 in Chapter Two and your mission statement in Chapter Four.)

- 1.
- 2.
- 3.

B. State your overall vision, goal, or hope for humanity (from the reflecting you did in Chapter Three):

C. List your main areas of funding (from Exercise 6.1):

- 1.
- 2.
- 3.
- 4.
- 5.

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D. Identify the strategies you prefer organizations use (refer to “Strategies for Change” in Chapter Three, or you may want to choose a philanthropic level at which to give, from Table 6.1 in Chapter Six):

- 1.
- 2.
- 3.
- 4.

E. Identify the geographic areas you want to give in:

Local _____%

Regional _____%

National _____%

Global _____%

F. Note the organizational sizes you plan to give to:

Small _____%

Start-ups or those under three years of age _____%

Medium _____%

Large or established _____%

Step 2. Using Worksheet 7.1, list your funding areas from the previous step in the first column (copy and expand the chart to accommodate as many organizations as you wish to include). Leave the other columns blank for now. You will come back to them in the next steps. If there are other funding areas you want to include, such as gifts to family and friends and tickets to fundraising events and dinners, add them here. You may also want to include a miscellaneous category, to give yourself room to make donations that don't fit in any named category, and in which you can respond to good work and urgent needs that may require a quick reaction. This category can be called “donor's whim” or “opportunities,” or some choice of your own to enable your spontaneous generosity. There are moments in history when we are simply called to consider different approaches or engage in acts of heartfelt (inspired) giving.

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Step 3. On the basis of the research you did in Chapter Six, designate in column three of Worksheet 7.1 specific groups you want to give to within your funding areas. If you haven't decided on all the groups you may want to include in a particular funding area, place a question mark where you need more information. Look for mission matches: the goals of the groups you choose should help accomplish your own giving mission.

Step 4. If you did not indicate the percentage of your giving you wish to go to each funding area in Exercise 6.1, do so now and add it to the worksheet in the second column. Choose first which area you are most committed to, placing your largest percentage of the total amount you will give there. Then follow with the percentages for your other issues or areas of funding.

Step 5. In the fourth column fill in the specific dollar amounts you will give to each of the organizations listed. If there's more than one group you want to give to in a given area, think about how you want to distribute the amount of money you've allocated to this area among the groups you've listed. A strategic point to consider for each organization is whether a large or small gift would be most effective. (On one hand, if you can do so, making a large gift of \$250 to \$5,000 may be crucial to the survival of some fledgling organizations. On the other hand, a local group may do more with \$100 than a national organization can do with \$500. For some colleges and high schools with multimillion-dollar capital campaigns, alumni participation at any level may be more important than the size of your gift in one year.) Experiment with different amounts and give yourself permission to make mistakes with gifts. If you learn that something you did wasn't right, you'll find out more clearly what does suit you.

Step 6. Decide on your funding cycles. When are you going to make your funding decisions and write your checks—will you do it once, twice, or four times a year; in the spring, the fall, at the New Year, on your birthday? Or will you decide whenever asked? In choosing your giving cycles, consider times of the year when you have a tight cash flow, tax time, heavy request times, and times when dinners and events seem to cluster. Once decided, give yourself permission not to make any gifts outside of your giving cycles. In the "When" column in Worksheet 7.1, write in when you plan to write a check or otherwise give to a group, based on the funding cycles you have established.

Step 7. Worksheet 7.1 contains a separate column for volunteer time. Your volunteer time may go to organizations you do not support financially. If you're going to volunteer time actually working with an organization, will you do so on a regular basis—perhaps a weekly stint answering phones or attending a monthly board meeting—or a seasonal basis—say, planning a fundraising event or helping write grant proposals at certain times of the year. Indicate how you will be involved and how much time you will spend for each organization.

Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
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Step 8. Use the notes column to record names of contacts, previous gifts you made to this group, or other information pertinent to your gifts of money and time. This column might include information such as whether the gift is to an organization with local, regional, national, or international reach, which strategy the work is focusing on, and other choices you have made.

Use this integrated worksheet to share your planning quickly, easily, and comprehensively with your advisors and other partners in your giving.