

Create a Giving Plan

To give away money is an easy matter ... and in any man's power. But to decide to whom to give it, and how large and when, for what purpose and how, is neither in every man's power nor an easy matter. Hence it is that such excellence is rare, praiseworthy and noble.

— Aristotle

The act of giving money is a powerful way to participate in changing in the world. Your money can contribute to saving lives and make an impact on serious problems in our world today. Giving money is also an important expression of your values and an opportunity to put your values into action. Being intentional about where you give and how much money you give away each year will help you maximize an opportunity to create change in the world in a way that aligns with your values. This worksheet will help you design an intentional plan for your philanthropic giving.

Step 1: Set your priorities

1. Start by considering the causes that are most important to you. What about our world makes you angry? What keeps you up at night? What are the most important things that you think need to change in order to improve our society and our world?

2. Financial donations often go not only toward addressing certain issues but also to particular communities of people. Factors such as relationship, geography, religion and perceived level of need impact our decisions on who to help. For example, you may prioritize supporting members of your own community and also supporting those in greatest need in a country far away where hunger and poverty are acute. Take a moment to consider not only the causes you want to support, but also which communities you prioritize.

3. Think about where you have given **in the past**. Are these donations aligned with priorities you expressed in questions one and two? If not, why not? Are there additional priorities you need to factor into your future giving? (For example, a donation to your alma mater.) Are there causes you have supported in the past that do not align with your priorities that you can stop funding? Respond to these questions in the space below.

4. Using your answers to the above questions, list the issues and communities you will support this year.

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Step 2: Find organizations to support

In order to decide where to give your money, it is important to articulate your vision for what you hope your money will help accomplish and the strategies you believe will help to achieve this vision.

1. For each issue and community you listed in questions four above, what do you hope your money will help to accomplish? Write your answers into the issue and vision columns in the below table.
2. For each row on your table, what strategy do you want to support to reach this vision? [See box below for more information.] Write your answers into the corresponding strategy column below.

Strategies for changing the world

There is not one way to effect change, and it often takes multiple strategies to impact an issue. While not comprehensive, here is a list of four common strategies that many charitable organizations use to achieve their goals. As you read these different strategies for change, consider the types of organizations that you want to support.

- a. **Direct service:** A direct service organization provides for the immediate needs of the community it serves. (For example: homeless shelters, food pantries and free or low-cost medical clinics.)
- b. **Technical assistance and training:** Organizations that employ this approach provide technical services to help people better their own lives. (For example: career counseling, job training or micro-loans to help individuals start their own businesses.)



- c. **Education and research:** Education and research organizations work to advance society's knowledge about important issues so that those working in the field are better able to make an impact. (For example: medical research, think tanks and organizations that educate to raise awareness about certain issues.)
- d. **Political or legal advocacy:** Organizations that engage in advocacy work put pressure on government representatives to influence policy change or bring cases to court to ensure that laws are not violated. (For example: by lobbying Congress to pass policies that support affordable housing or bringing a legal case against a corporation that is in violation of environmental protection laws.)

3. Which organizations can you support that share your vision and strategy for change? If you don't know how to find these organizations, reach out to friends, family, teachers and others to ask for suggestions. In addition, experts in the field often recommend organizations to support in newspapers, magazine articles and blog posts. If you still can't find what you are looking for, search online for the causes you care about. Write the organizations you want to support in the table below.

Doing due diligence

It is important to make sure the organizations you support act in the best interest of the communities they serve. As you research organizations, ask the following questions:

- a. Is the organization transparent about how money is allocated and spent? Check online services such as Charity Navigator and GuideStar to evaluate the financial health and accountability of an organization you want to support.
- b. How effective is the organization in meeting its goals? Ask for success stories and whether the organization evaluates its programs.
- c. Do people who are served by this organization have an active role in deciding where money goes and how it is spent? Communities in need often know best how to address the challenges they face. Organizations are most helpful and effective when they respond to the articulated needs of those they seek to help, not when they push their own agenda.

Issue	Vision	Strategy	Organization

Step 3: Decide how much you will give

The question of how much money you will give away is not trivial. How can we individually, and as a society, filter more of our money to bettering the world? Many of us can afford to give far more than we are giving, or can curb our spending on things we don't need in order to give more. Supporting causes that align with your passions and values can help you to feel more compelled to give. But you will also need to take the plunge to maximize your giving potential.

1. How much money (and what percentage of your income) did you give away **last year**?

2. Honestly ask yourself: Can you afford to give more than you are currently giving? If so, what holds you back from giving more? What will help you overcome this obstacle?

3. What percentage of your income will you donate this year? Use the following chart as a guide. Find your income level and then look across until you see the percentage of your income that makes sense to you.*

Income	2%	3%	5%	10%	15%	20%
\$30,000	\$600	\$900	\$1,500	\$2,000	\$4,500	\$6,000
\$40,000	\$800	\$1,200	\$2,000	\$4,000	\$6,000	\$8,000
\$50,000	\$1,000	\$1,500	\$2,500	\$5,000	\$7,500	\$10,000
\$60,000	\$1,200	\$1,800	\$3,000	\$6,000	\$9,000	\$12,000
\$75,000	\$1,500	\$2,225	\$3,750	\$7,500	\$11,250	\$15,000
\$100,000	\$2,000	\$3,000	\$5,000	\$10,000	\$15,000	\$20,000
\$250,000	\$5,000	\$7,500	\$12,500	\$25,000	\$37,000	\$50,000

* The amounts are listed in pre-tax dollars but you can choose to calculate post-tax figures.

4. Fill in the blank. This year, I commit to giving away \$ _____ to philanthropic causes.

Step 4: Divide it up

Use the chart below to divide your money across the organizations you listed. Consider whether you want to divide your money so that many organizations receive a small amount, or if you would rather give larger amounts to a smaller number of organizations.

Organization	Percentage of my giving	Amount to donate
Totals		

Step 5: Write the check or click the “donate” button

Congratulations on making a thoughtful and intentional plan for your philanthropic giving. Now, help others learn from you! Discuss your giving plan with friends and ask them about their giving priorities. We also invite you to share your planning process on the Where Do You Give? [blog](#) or by uploading a [video](#) about your experience on the [website](#).

