

# A. REFLECT ON YOUR — MOTIVATIONS & VALUES

## INSTRUCTIONS

Review the questions in *Activity A* to clarify your philanthropic motivations and the values important to your giving. Jot down your thoughts. We encourage you to consider each question fully.

### REFLECTION QUESTIONS ABOUT YOUR MOTIVATIONS:

- What motivates you to give?
- What do you hope to gain from your giving?
- What are your immediate philanthropic goals?
- What are your long-term philanthropic goals?
- What do you want to sustain or keep the same in the world?
- What do you want to change in the world?

### REFLECTION QUESTIONS ABOUT YOUR VALUES:

- What values are important to your giving?
- Where have you given your time and money in the past, and why?
- Where do you give your time and money currently, and why?
- What issues interest you most, and why?
- Are there any issues that particularly compel you to act?
- What is a life experiences that has shaped you, the way you look at the world, and your giving?
- What are some moments or experiences where you felt like you had some impact in the world?



A. REFLECT ON YOUR  
— MOTIVATIONS & VALUES

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— MOTIVATIONS & VALUES

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## B. SELECT YOUR — VALUES

### INSTRUCTIONS

Read the EPLI Value Cards and record the values important to your giving. There are also five blank cards to write in values not already on the cards.

For couples and families, it can be helpful to do this activity individually first, and then share your responses and discuss areas of overlap and differences.

The full set of EPLI Value Cards includes the values listed below, plus six blank cards for any other values you want to highlight.

Accountability	Growth
Accessibility	Humility
Collaboration	Innovation
Community	Inquiry
Creativity	Justice
Diversity	Leadership
Effectiveness	Outcomes
Empathy	Peace
Equality	Respect
Equity	Security
Freedom	Tradition
Faith	Trust

\*EPLI developed this list in a team brainstorming activity.



B. EPLI  
— VALUE CARDS

Accountability	Accessibility	Collaboration
Community	Creativity	Diversity
Effectiveness	Empathy	Equality
Equity	Freedom	Faith
Growth	Humility	Innovation



B. EPLI  
— VALUE CARDS

Inquiry	Justice	Leadership
Outcomes	Peace	Respect
Security	Tradition	Trust
_____	_____	_____
Write in your own	Write in your own	Write in your own
_____	_____	_____
Write in your own	Write in your own	Write in your own

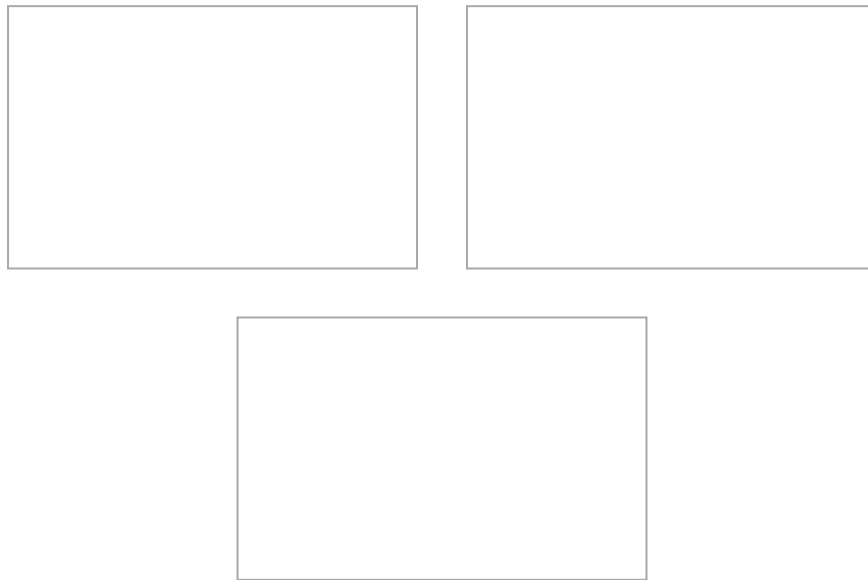


B. SELECT YOUR  
— VALUES

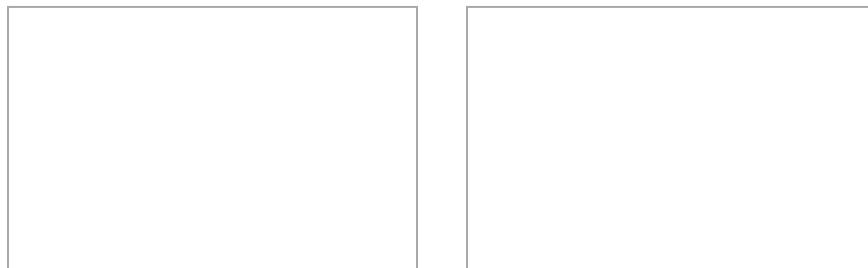
INSTRUCTIONS

Read through the set of EPLI Value Cards and select the top three as your "Core Values." You may choose two additional cards as your other primary values. In the space on the next page, jot down how these values might influence your philanthropy.

CORE VALUES:

Three empty rectangular boxes are provided for recording core values. Two boxes are arranged horizontally at the top, and one larger box is centered below them.

ADDITIONAL VALUES:

Two empty rectangular boxes are provided for recording additional values, arranged horizontally.

B. SELECT YOUR  
— VALUES

REFLECTIONS  

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B. EPLI  
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Community	Creativity	Diversity
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Inquiry	Justice	Leadership
Outcomes	Peace	Respect
Security	Tradition	Trust
_____	_____	_____
Write in your own	Write in your own	Write in your own
_____	_____	_____
Write in your own	Write in your own	Write in your own



## C. LOOK BACK AT YOUR — GIVING HISTORY

### INSTRUCTIONS

Review your previous contributions and volunteer work over a given period of time to identify issues that are meaningful to you.



C. LOOK BACK AT YOUR  
— GIVING HISTORY

**INSTRUCTIONS**

Identify the period of time (e.g., a number of years) you will review. Note the recipients, amounts, and frequency of your contributions during this period. In the second table, note where you volunteered your time, how much you volunteered, and how often.

The following table reflects my giving history from \_\_\_\_\_  
to \_\_\_\_\_

Gifts Overview

	ORGANIZATION/EVENT/PERSON	AMOUNT/FREQUENCY	IS THIS A ONE-TIME GIFT?
<i>Example</i>	<i>American Red Cross</i>	<i>\$25/month</i>	<i>No</i>
1			
2			
3			
4			
5			



C. LOOK BACK AT YOUR  
— GIVING HISTORY

Volunteering Overview

	ORGANIZATION/EVENT	TIME/FREQUENCY
<i>Example</i>	<i>American Society for the Prevention of Cruelty to Animals (ASPCA)</i>	<i>3 hours/week</i>
1		
2		
3		
4		
5		



C. LOOK BACK AT YOUR  
— GIVING HISTORY

INSTRUCTIONS

Based on your giving history, answer the following questions.

Where did you give the most, in terms of both your financial resources and your time? Are there similarities between these recipients?

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Which issues prompted you to give the most, in terms of both your financial resources and your time? Did you concentrate your giving in any way (for instance, more time to one issue, more money to another)? Do those issues reflect what is most important to you today? You can select from the EPLI Issue Cards or write other issues on the blank Issue Cards, and record them below.

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Does your giving reflect your values? If yes, how? If no, why not?

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Do you see any other themes or trends in your giving?

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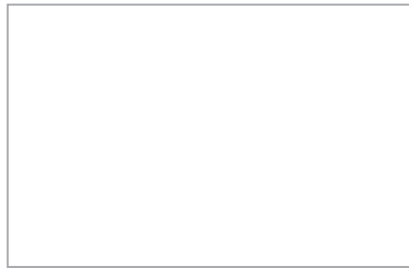


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**INSTRUCTIONS**

Based on your answers, select the issues that are most meaningful to you and that you would like to focus on in your giving. Note any reflections in the space below.



**REFLECTIONS**

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# D. SELECT YOUR — ISSUES

## INSTRUCTIONS

Read the EPLI Issue Cards and select the issues that you may be interested in supporting. The Issue Cards provide an overview of broad issue categories and include three blank cards for you to write in any other issues that might interest you—for example, a specific issue or organization you already know you would like to fund.





D. EPLI ISSUE  
— CARDS

**INSTRUCTIONS**

Review the front side of the EPLI Issue Cards that include the topics below. These cards provide an entry point into an issue. There are also three blank cards so that you can write in any specific causes that might be meaningful to you.

Arts, Culture & Humanities	Education	Environment
Animal Related	Health	Law & Society
Social Services	Food & Nutrition	Disaster Preparedness & Relief
International Development	Civil rights & Advocacy	Place-based Giving



D. EPLI ISSUE CARDS

INSTRUCTIONS

For the Issue Cards selected, review the backside of the cards and circle any specific focus areas of interest (i.e. Special education, Cancer), or write in focus areas meaningful to you.

<ul style="list-style-type: none"> <li>• Climate Change</li> <li>• Environmental Education</li> <li>• Natural Resources Conservation &amp; Protection</li> <li>• Pollution Abate &amp; Control</li> <li>• Recycling Programs</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Elementary &amp; Secondary Schools</li> <li>• Vocational &amp; Technical Schools</li> <li>• Higher Education</li> <li>• Graduate &amp; Professional Schools</li> <li>• Special Education</li> <li>• Adult Education</li> <li>• Libraries</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Arts &amp; Culture</li> <li>• Arts Services</li> <li>• Historical Organizations</li> <li>• Humanities</li> <li>• Media &amp; Communications</li> <li>• Museums</li> <li>• Performing Arts</li> <li>• Visual Arts</li> <li>• _____</li> </ul>
<ul style="list-style-type: none"> <li>• Correctional Facilities</li> <li>• Crime Prevention</li> <li>• Law Enforcement</li> <li>• Legal Services</li> <li>• Protection Against Abuse</li> <li>• Rehabilitation Services</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Hospitals &amp; Primary Healthcare</li> <li>• Disease</li> <li>• Counseling</li> <li>• Medical Research</li> <li>• Mental Health</li> <li>• Public Health</li> <li>• Reproductive Healthcare</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Animal Protection &amp; Welfare</li> <li>• Veterinary Services</li> <li>• Wildlife Preservation &amp; Protection</li> <li>• Zoos &amp; Aquariums</li> <li>• _____</li> </ul>
<ul style="list-style-type: none"> <li>• Disaster Preparedness &amp; Relief Services</li> <li>• Search &amp; Rescue Squads</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Food Programs &amp; Security</li> <li>• Nutrition</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• Children &amp; Youth Services</li> <li>• Fair Employment</li> <li>• Family Services &amp; Assistance</li> <li>• Housing &amp; Shelter</li> <li>• Labor Unions</li> <li>• _____</li> </ul>
<ul style="list-style-type: none"> <li>• Philanthropy to a particular location (town, city, county, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Civil Liberties</li> <li>• Civil Rights</li> <li>• Inter-Group &amp; Race Relations</li> <li>• Voter Education &amp; Registration</li> <li>• _____</li> </ul>	<ul style="list-style-type: none"> <li>• International Human Rights</li> <li>• International Peace &amp; Security</li> <li>• _____</li> </ul>



D. SELECT YOUR  
— ISSUES

**INSTRUCTIONS**

Review the front side of the EPLI Issue Cards. Select up to five cards that resonate most with you. When selecting, think about your personal interests, particular segments of society you want to help, and what their specific needs are. Review the backs of your selected cards. Circle any focus areas of interest (e.g., special education, cancer), or write in focus areas that are meaningful to you. Note any reflections you have in the space on the next page.




D. SELECT YOUR  
— ISSUES

REFLECTIONS

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# E. CRAFT YOUR FOCUS STATEMENTS

A focus statement frames your values and motivations and connects them with your philanthropic intentions. A strong focus statement can help you guide your philanthropic plan. We recommend creating a separate focus statement for each distinct issue. For each issue, consider the specific population and location you would like address.

Example: *We aim to address education inequality for low-income secondary school students in Grand Rapids Public Schools because this aligns with our commitment to equity in public education.*

## INSTRUCTIONS

Craft short statements that articulate your intention to address each of your selected focus areas.

If you don't yet feel ready to articulate focus statements, you can return to them later in this toolkit or as you actually engage in giving, recognizing that they may change over time.



## E. CRAFT YOUR FOCUS STATEMENTS

### INSTRUCTIONS

Complete the statement below, using your selected EPLI Value Cards and Issue Cards to identify the essential components. Craft focus statements for each of your focus areas in the space below.

We aim to address *[WHAT]* for *[WHO]* *[WHERE]* because this aligns with our commitment to *[WHICH VALUE]*.

WHAT: What causes/issues do you want to address with your philanthropy (e.g., environment, education, animal related)?

WHO: Who will specifically benefit from your philanthropy (e.g., homeless people, low-income children, abused animals)?

WHERE: Where, geographically, will you focus your philanthropy (e.g., a specific location, locally, statewide, nationally, globally)?

WHICH VALUE(S): Which value is driving your goal (e.g., respect, diversity, empathy)?

### Example:

We aim to address **education inequality** for **low-income secondary school students** in **Grand Rapids Public Schools** because this aligns with our commitment to **equity in public education**.





E. CRAFT YOUR FOCUS STATEMENTS

Keep these four principles in mind:

- Be specific.
- Use simple language (avoid buzzwords, e.g., education reform).
- Keep it concise.
- Make it actionable.

1.

We aim to address \_\_\_\_\_

for \_\_\_\_\_

because this aligns with our commitment to \_\_\_\_\_

2.

We aim to address \_\_\_\_\_

for \_\_\_\_\_

because this aligns with our commitment to \_\_\_\_\_

E. CRAFT YOUR FOCUS STATEMENTS

3.

We aim to address \_\_\_\_\_

for \_\_\_\_\_

because this aligns with our commitment to \_\_\_\_\_

4.

We aim to address \_\_\_\_\_

for \_\_\_\_\_

because this aligns with our commitment to \_\_\_\_\_

5.

We aim to address \_\_\_\_\_

for \_\_\_\_\_

because this aligns with our commitment to \_\_\_\_\_



# F. REFLECT ON YOUR — TIME AND TALENT

## INSTRUCTIONS

Review the questions in *Activity F* to reflect on your interest in contributing your time and talent to a particular focus area. Jot down your thoughts.

### REFLECT ON YOUR INTEREST IN GENERAL VOLUNTEER WORK BY ANSWERING THESE QUESTIONS:

- Is there an issue you would like to learn about through firsthand experience?
- If you have an organization in mind, is that organization accepting volunteers? What responsibilities do volunteers have?
- Does the organization need volunteers with particular skills or experience? Do you have the skills or experience they need?
- What is the time commitment for volunteers at the organization? Are you able to commit your time?

### REFLECT ON THESE QUESTIONS TO DETERMINE YOUR INTEREST IN BOARD SERVICE:

- Do you have enough time for board service?  
*Serving as a board member requires more than attending meetings. You will often be expected to serve on one or more committee, read and understand financial documents, represent the organization at various events, and fundraise.*
- Are you willing and able to meet fundraising expectations?  
*Board members are usually asked to make personal contributions as well as raise funds from their personal network. You may also be asked to network with potential donors on behalf of the organization.*
- What skills or expertise do you offer the organization's board? Are your skills or expertise needed?  
*Board members offer a variety of skills and experience from their professional work to assist with the overall functions of the board.*







# EPLI PHILANTHROPY PLANNER

## FINDING YOUR FOCUS AREAS SUMMARY

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Now that you have completed this module, turn to the Finding Your Focus Areas Summary on the next page. Fill in the table to outline your selected focus areas. Tear out the completed table to include in your Philanthropy Planner at the end of the toolkit.



# FINDING YOUR FOCUS AREAS SUMMARY

**INSTRUCTIONS**

Review your total philanthropy allocation for a set period of time (e.g., a year or two) to help you better understand the potential impact on an issue, location, or organization. Write the amount in the upper right corner. Your total allocation may help you narrow the number of issue areas you address over a given period of time. Although this amount may change, starting with a draft amount can make this process more practical and concrete. In Section 4, you can work with your advisor to determine your total philanthropy allocation going forward.

<p>Your Causes</p> <p><b>UP TO 5 ISSUE CARDS FOR YOUR FOCUS AREAS</b></p>	<p>1</p> <p>Place Issue Card here</p>
<p>Who</p> <p><b>WHO WILL YOU FOCUS ON HELPING?</b></p> <p>(e.g., schoolchildren, inner-city residents, homeless people)</p>	
<p>Where</p> <p><b>WHERE WILL YOU FOCUS YOUR GIVING?</b></p> <p>(e.g., globally, nationally, a specific region)</p>	



**INSTRUCTIONS**

Place your selected EPLI Issue Cards on the Section Summary below. If you already know how they rank, you may choose to place the Issue Cards in order from 1 to 5 across the planner. If you have two competing issues, you can choose to make them equal priorities, or prioritize them after you have selected the organizations you would like to fund.

The following table reflect focus areas from \_\_\_\_\_ to \_\_\_\_\_

<p>Your Causes</p> <p>2</p> <p>Place Issue Card here</p>	<p>Your Causes</p> <p>3</p> <p>Place Issue Card here</p>
<p>Who</p>	<p>Who</p>
<p>Where</p>	<p>Where</p>





**INSTRUCTIONS**

Define your focus areas further by reflecting on the population you want to help (e.g., elementary school children, inner-city residents, homeless people) and the location where you want to practice your philanthropy (e.g., globally, nationally, a specific region). If you feel that your interest in the issue remains broad, you may leave this blank until you identify possible organizations to support.

Total Amount Allocated:

<p>Your Causes</p> <p>4</p> <p>Place Issue Card here</p>	<p>Your Causes</p> <p>5</p> <p>Place Issue Card here</p>
<p>Who</p>	<p>Who</p>
<p>Where</p>	<p>Where</p>

