

DONOR STORY

Aligning A Portfolio With One's Priorities

—*Jan Half*

At this point in my life, I have a very clear idea of my philanthropic priorities: 27% of my giving goes to education-related nonprofits (of which 23% are focused on STEM/STEAM education groups targeting underserved youth), 52% goes to my post-secondary alma maters in the form of scholarships to students in underserved areas, 20% goes to my religious institution (the first gay and lesbian synagogue in San Francisco where I met my partner), and 1% of my giving goes to miscellaneous donations in honor or in memory of others. While my strategy has evolved over the years, my focus on supporting underserved youth has remained consistent. Upon graduating with my teaching credential, I began teaching in the small, rural town of Leland, Illinois. Years later, as a nonprofit executive at MOUSE Squad Student Tech, my focus on helping underserved students persisted and still does to this day.

ACTIVITY SET YOUR PHILANTHROPIC BUDGET

You may already have an amount in mind for your philanthropic budget this year. To begin this process for the first time or to reconsider your allocation, review the question below—on your own or with the support of your wealth advisor.

How much do you wish to allocate to philanthropy in the next year, over the next several years, or for a longer period?

.....

.....

Once you have determined your annual budget, you can allocate funds across your focus areas. In addition to supporting organizations financially, you may wish to make non-monetary contributions of your time and talent by volunteering, including serving on a board (see **Chapter 9: Engaging Organizations and Developing Relationships With Their Leadership**).

THE STANFORD PACS

GUIDE

TO EFFECTIVE PHILANTHROPY

Copyright 2020 Board of Trustees of
The Leland Stanford Junior University.
Licensed under a Creative Commons Attribution 4.0
International (CC BY 4.0) License.

Published June 2020



Stanford PACS

Center on Philanthropy
and Civil Society

—

Effective Philanthropy Learning Initiative