

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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ACTIVITY

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.



WORKSHEET

LOOK BACK AT YOUR GIVING HISTORY

INSTRUCTIONS

Identify the period of time (e.g., number of years) you will review. In the Gifts Overview table, note the recipients, amounts, and frequency of your contributions during this period. In the Volunteering Overview 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>	American Red Cross	\$25 / month	No
1			
2			
3			
4			
5			



WORKSHEET
LOOK BACK AT YOUR GIVING HISTORY

VOLUNTEERING OVERVIEW

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



WORKSHEET
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 among 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 Issue Cards or write other issues on the blank Issue Cards, and then 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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WORKSHEET
LOOK BACK AT YOUR GIVING HISTORY

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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