

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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ACTIVITY RECOUNT YOUR CONTRIBUTIONS

INSTRUCTIONS

This activity is for those who have made previous contributions to their selected issues.

Recount your previous contributions to understand your giving distribution across your selected issues and the total amount allocated.

Consider adjustments to make your giving more proactive.

Skip ahead to Activities K and L if you prefer to start from a clean slate with your future giving plans.

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

INSTRUCTIONS

Identify the period of time you would like to review (e.g., a year or two) and recount your contributions. Record your contributions during this period in one of the three giving buckets below. Once you are finished, total each bucket. Reflect on these amounts to understand your giving distribution across your selected issues, and consider any adjustments to make your giving more proactive. Finally, total the amounts from each giving bucket to arrive at your total contribution during this period. Reflect on this total and consider any adjustments you want to make for future giving.

GIVING BUCKET 1 – PROACTIVE GIVING

Donations you made to organizations working on your selected issues.

ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Education</i>	<i>Girls Who Code</i>	<i>Yes</i>	<i>Feb.</i>	<i>\$750</i>

TOTAL AMOUNT:

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

GIVING BUCKET 2 – REACTIVE GIVING Donations you made in response to personal requests from family and friends to support their issues and fundraisers.				
ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Health</i>	<i>Martha's Alzheimer's disease walk</i>	<i>Yes</i>	<i>Dec.</i>	<i>\$250</i>
TOTAL AMOUNT:				

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

The following table reflects contributions from _____
 to _____.

GIVING BUCKET 3 – EMERGENCY GIVING Donations to disaster and emergency relief funds or to social issues as a result of policy changes.				
ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Disaster relief</i>	<i>American Red Cross</i>	<i>Yes</i>	<i>Sept</i>	<i>\$500</i>
TOTAL AMOUNT:				