

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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ACTIVITY

ALLOCATE YOUR PHILANTHROPY BUDGET

INSTRUCTIONS

Determine how you would like to allocate your total philanthropy budget across your focus areas and giving buckets (i.e., proactive giving, reactive giving, and emergency giving) using the Budget Coins. Adjust your philanthropic allocations until they feel right to you.



WORKSHEET ALLOCATE YOUR PHILANTHROPY BUDGET

INSTRUCTIONS

Determine how you would like to allocate your total philanthropy budget across your focus areas (i.e., proactive giving, reactive giving, and emergency giving) using the Budget Coins.

Write in your total philanthropy budget and the time period. Use the Budget Coins to determine the percentage allocated to each column. Adjust your philanthropic allocations across your three buckets and focus areas until they feel right to you. When you feel satisfied with the allocations, write the budget amount in dollars in the last row.

GIVING BUCKET	<i>Example</i>
FOCUS AREA / ISSUE	<i>Early childhood initiatives in Oakland</i>
% OF TOTAL PHILANTHROPY BUDGET	10%
BUDGET ALLOCATED	<i>\$10,000</i>



WORKSHEET
ALLOCATE YOUR PHILANTHROPY BUDGET

Your total philanthropy budget: _____

From _____ to _____

PROACTIVE GIVING

Write in your focus areas (or transfer your selected Issue Cards from the Finding Your Focus Areas Section Summary), including any commitments you have already made that you would like to include in your proactive giving.

1 Place Issue Card here	2 Place Issue Card here	3 Place Issue Card here
Place Budget Coins here	Place Budget Coins here	Place Budget Coins here



WORKSHEET
ALLOCATE YOUR PHILANTHROPY BUDGET

REACTIVE GIVING Record any commitments you have already made that you consider reactive.	EMERGENCY GIVING Record any commitments you have already made that you consider emergency.

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ACTIVITY
BUDGET COINS

