

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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ACTIVITY

SHORTLIST ORGANIZATIONS

INSTRUCTIONS

For each focus area, select organizations in your vetting process. Use the different approaches to help you shortlist organizations you may want to fund.

WORKSHEET
SHORTLIST ORGANIZATIONS

INSTRUCTIONS

For each focus area, shortlist organizations that you would like to review further.

	ORGANIZATION 1
WHO DOES THE ORGANIZATION AIM TO SERVE?	
WHERE DOES THE ORGANIZATION FOCUS ITS WORK?	
WEBSITE / NAME OF CONTACT / CONTACT INFORMATION	
HOW DOES THIS ORGANIZATION ALIGN WITH YOUR PHILANTHROPIC GOALS?	
WHEN YOU ARE SATISFIED WITH YOUR LIST, SELECT THE ORGANIZATIONS YOU WILL INCLUDE IN YOUR VETTING PROCESS.	<input type="checkbox"/> Shortlisted for due diligence <input type="checkbox"/> Due diligence completed



WORKSHEET
SHORTLIST ORGANIZATIONS

ORGANIZATION 2	ORGANIZATION 3
<div><input type="checkbox"/> Shortlisted for due diligence</div> <div><input type="checkbox"/> Due diligence completed</div>	<div><input type="checkbox"/> Shortlisted for due diligence</div> <div><input type="checkbox"/> Due diligence completed</div>