

# THE PHILANTHROPY TOOLKIT

*An Introduction to Giving Effectively*

THE STANFORD UNIVERSITY  
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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## EPLI PHILANTHROPY PLANNER INVOLVING FAMILY SUMMARY

**INSTRUCTIONS**  
List the individuals that you would like to involve in your philanthropy.

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•	•
•	•

**INSTRUCTIONS**  
For each name you have listed above, consider what role you want them to have. Also think about their strengths and any concerns you have with involving this person in your philanthropy.

<i>Example</i>	
<b>NAME</b> Martha	<b>ROLE(S)</b> Thought Partner
<b>STRENGTHS</b> How would this person help me meet my philanthropic goals?  <i>Knows organizations in the local community. Shares my values and interests.</i>	<b>CONCERNS</b> Why might you hesitate to involve this person?  <i>May be busy with other projects.</i>
List the topics you would like to discuss with this person:  <i>Recommendations for education organizations.</i>	Action steps to move forward:  <i>Will ask next lunch.</i>

FAMILY MEMBER 1	
<b>NAME</b>	<b>ROLE(S)</b>
<b>STRENGTHS</b> How would this person help me meet my philanthropic goals?	<b>CONCERNS</b> Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 2	
<b>NAME</b>	<b>ROLE(S)</b>
<b>STRENGTHS</b> How would this person help me meet my philanthropic goals?	<b>CONCERNS</b> Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 3	
<b>NAME</b>	<b>ROLE(S)</b>
<b>STRENGTHS</b> How would this person help me meet my philanthropic goals?	<b>CONCERNS</b> Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 4	
<b>NAME</b>	<b>ROLE(S)</b>
<b>STRENGTHS</b> How would this person help me meet my philanthropic goals?	<b>CONCERNS</b> Why might you hesitate to involve this person?
List the topics you would like to discuss with this person:	Action steps to move forward:

FAMILY MEMBER 5	
NAME	ROLE(S)
<p><b>STRENGTHS</b></p> <p>How would this person help me meet my philanthropic goals?</p>	<p><b>CONCERNS</b></p> <p>Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>

FAMILY MEMBER 6	
NAME	ROLE(S)
<p><b>STRENGTHS</b></p> <p>How would this person help me meet my philanthropic goals?</p>	<p><b>CONCERNS</b></p> <p>Why might you hesitate to involve this person?</p>
<p>List the topics you would like to discuss with this person:</p>	<p>Action steps to move forward:</p>