

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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EPLI PHILANTHROPY PLANNER
MAKING & TRACKING GIFTS SUMMARY

INSTRUCTIONS

Identify the period of time (e.g., a year or two) your giving plan will cover, and a date when you will revisit your funding decisions. Fill in the boxes for each of the organizations you have decided to fund to create a complete record of your giving. On the next page, write in any organizations you wish to volunteer with during this period. Tear out the completed table to include in your Philanthropy Planner at the end of this toolkit.

The following table reflects contributions from _____
 to _____

I plan to revisit my funding decisions on _____

**TOTAL AMOUNT
 ALLOCATED**

MAKING GIFTS OVERVIEW

ORGANIZATION NAME	ORGANIZATION STATUS Is it a 501(c)(3) or 501(c)(4)?	TYPE OF ORGANIZATION FUNDING Unrestricted / Restricted	DONATION AMOUNT	ONE-TIME OR RECURRING GIFT? Note frequency (e.g., monthly, annual) if applicable	GIVING VEHICLE Note which of your selected vehicles you will use for this gift.	GIFT DOCUMENTATION Will your gift need any supporting documents?	NEXT STEPS Write down any actions you need to make this gift and any deadlines that apply.

VOLUNTEERING OVERVIEW

ORGANIZATION NAME	INTENDED AMOUNT OF TIME TO VOLUNTEER Note how much time you can contribute.	ONE-TIME OR RECURRING? Note any frequency (e.g., monthly, annual) if applicable.	ORGANIZATION CONTACT Who will be your primary contact to arrange your volunteer hours?	NEXT STEPS Write down any actions you will need to take to make this commitment possible and any deadlines that apply.