

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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SECTION 1

HOW DO YOU FIND YOUR
FOCUS AREAS?



1. FINDING YOUR FOCUS AREAS

Outlining focus areas for your philanthropy is key to effective, meaningful, and proactive philanthropy.

This section will guide you through the following steps:

- 1 Clarify your motivations and values,** which will guide your decision-making throughout the giving process.
- 2 Narrow your focus areas** to identify the issues most meaningful to you and give your philanthropy direction.
- 3 Consider your time, talent, and social ties** to understand how you can contribute to your focus areas with your skills and network.

1.1

CLARIFY YOUR MOTIVATIONS & VALUES

Articulating your motivations and values allows you to develop a proactive, effective philanthropic plan rather than giving reactively to funding requests. Ultimately, your motivations and values provide the anchor for decision-making at each step of the philanthropy process.

The following two activities are meant to be completed together. **Activity A** provides reflection questions to help clarify the motivations driving your giving as well as the values underlying it. **Activity B** uses **Value Cards** to help you identify the values that are most important to you.

ACTIVITIES

- A** Reflect on Your Motivation & Values
- B** Select Your Values

A

ACTIVITY

REFLECT ON YOUR MOTIVATIONS & VALUES

INSTRUCTIONS

Review the questions in Activity A to clarify your philanthropic motivations and identify the values important to your giving. Jot down your thoughts. We encourage you to consider each question fully.

REFLECTION QUESTIONS ABOUT YOUR MOTIVATIONS:

- What motivates you to give?
- What do you hope to gain from your giving?
- What are your immediate philanthropic goals?
- What are your long-term philanthropic goals?
- What do you want to sustain or keep the same in the world?
- What do you want to change in the world?

REFLECTION QUESTIONS ABOUT YOUR VALUES:

- What values are important to your giving?
- Where have you given your time and money in the past, and why?
- Where do you give your time and money currently, and why?
- What issues interest you most, and why?
- What issues feel most pressing to you, and why?
- What life experiences have shaped you, the way you look at the world, and your giving?
- What are some moments or experiences in which you felt like you had some impact on the world?



ACTIVITY SELECT YOUR VALUES

INSTRUCTIONS

To help you select the values important to your giving, circle the words in the list below or use the Value Cards on the following pages or at the back of the toolkit.

For couples and families, it can be helpful to do this activity individually first, and then share your responses and discuss areas of overlap and differences.

The Value Cards deck includes the values listed below, plus some blank cards for any other values you want to highlight.

- | | | |
|----------------|-----------------|--------------------|
| ACCESSIBILITY | FAMILY | LOVE |
| ACCOUNTABILITY | FREEDOM | LOYALTY |
| AUTHENTICITY | FUN | PASSION |
| COLLABORATION | GENEROSITY | PATRIOTISM |
| COMMUNITY | GROWTH | PEACE |
| CONNECTION | HAPPINESS | PERSISTENCE |
| COURAGE | HARMONY | RESOURCEFULNESS |
| CREATIVITY | HEALTH | RESPECT |
| CURIOSITY | HONOR | SECURITY |
| DIGNITY | HUMILITY | SELF-ACTUALIZATION |
| DISCIPLINE | HUMOR | SERVICE |
| DIVERSITY | INDEPENDENCE | SIMPLICITY |
| EFFECTIVENESS | INNOVATION | SPIRITUALITY |
| EMPATHY | INTEGRITY | SPONTANEITY |
| EMPOWERMENT | INTERDEPENDENCE | STEWARDSHIP |
| EQUITY | JOY | TRADITION |
| EXPLORATION | JUSTICE | TRUSTWORTHINESS |
| FAIRNESS | KINDNESS | UNITY |
| FAITH | LEADERSHIP | WELLBEING |

B

ACTIVITY
SELECT YOUR VALUES

ACCESSIBILITY

ACCOUNTABILITY

AUTHENTICITY

COLLABORATION

COMMUNITY

CONNECTION

COURAGE

CREATIVITY

CURIOSITY

DIGNITY

DISCIPLINE

DIVERSITY

EFFECTIVENESS

EMPATHY

EMPOWERMENT

B

ACTIVITY
SELECT YOUR VALUES

EQUITY	EXPLORATION	FAIRNESS
FAITH	FAMILY	FREEDOM
FUN	GENEROSITY	GROWTH
HAPPINESS	HARMONY	HEALTH
HONOR	HUMILITY	HUMOR

B

ACTIVITY
SELECT YOUR VALUES

INDEPENDENCE

INNOVATION

INTEGRITY

INTERDEPENDENCE

JOY

JUSTICE

KINDNESS

LEADERSHIP

LOVE

LOYALTY

PASSION

PATRIOTISM

PEACE

PERSISTENCE

RESOURCEFULNESS

B

ACTIVITY
SELECT YOUR VALUES

RESPECT

SECURITY

SELF-ACTUALIZATION

SERVICE

SIMPLICITY

SPIRITUALITY

SPONTANEITY

STEWARDSHIP

TRADITION

TRUSTWORTHINESS

UNITY

WELLBEING

WRITE IN YOUR OWN

WRITE IN YOUR OWN

WRITE IN YOUR OWN

B

WORKSHEET
SELECT YOUR VALUES

INSTRUCTIONS

Read through the set of Value Cards and select the top three as your "Core Values." You may choose two additional cards as your other primary values. In the space on the next page, jot down how these values might influence your philanthropy.

CORE VALUES

ADDITIONAL VALUES

1.2

NARROW YOUR FOCUS AREAS

The simplest way to organize your philanthropy is to focus on several specific issues, rather than giving across many issues. While your philanthropic budget certainly can allow room for reactive and emergency giving (see **Section 4: Structuring Your Giving**), narrowing your focus areas for proactive giving helps prioritize your resources.

This is true even if your philanthropy is concerned with a particular community—for you cannot give to every possible cause. It is also true for donors who are motivated by the philosophy of effective altruism, which is concerned with alleviating the conditions of abject poverty and avoiding global catastrophes (see effectivealtruism.org for more information).

Continued on the following page.

ACTIVITIES

- C** Look Back at Your Giving History
- D** Select Your Issues
- E** Craft Your Focus Statements

1.2

We have developed two activities to help you narrow your focus areas. Both activities help you reflect on issue areas and select a few to integrate into your initial giving plan.

1. LOOK BACK AT YOUR GIVING HISTORY.

Activity C is for donors who have a significant history of giving. This activity will help you take stock of your past giving and determine trends and themes. From there, you can understand which issues you are most passionate about, assess how you have supported them in the past, and decide whether you would like to make adjustments.

2. BEGIN WITH A CLEAN SLATE AND SELECT ISSUES WITHOUT RELYING ON PRECEDENT.

If you wish to start with a clean slate, **Activity D** will help you explore a range of potential issues and select those that align with your values and motivations.

We also developed a deck of Issue Cards located on the following pages and in the card deck at the back of this toolkit. The full set includes the issues listed below, plus some blank cards for any other issues you want to highlight. Potential focus areas are included on the back of each Issue Card.

- | | |
|--------------------------------|---------------------------|
| ANIMAL RELATED | FOOD & NUTRITION |
| ARTS, CULTURE & HUMANITIES | HEALTH |
| CIVIL RIGHTS & ADVOCACY | INTERNATIONAL DEVELOPMENT |
| DISASTER PREPAREDNESS & RELIEF | LAW & SOCIETY |
| EDUCATION | SOCIAL SERVICES |
| ENVIRONMENT | OTHER |

Finally, effective philanthropists often narrow their focus even further by identifying a target population and location for each issue. For example, a philanthropist who selected “education” as an issue might narrow her focus area to adolescent girls’ math education on the South Side of Chicago. **Activity E** guides you through narrowing your focus to target populations and locations.

The Issue Card categories were selected from the National Taxonomy of Exempt Entities, developed by the IRS and the National Center for Charitable Statistics to classify nonprofit organizations.

nccs.urban.org/classification/national-taxonomy-exempt-entities



ACTIVITY
LOOK BACK AT YOUR GIVING HISTORY

INSTRUCTIONS

Review your previous contributions and volunteer work over a given period of time to identify issues that are meaningful to you.



WORKSHEET

LOOK BACK AT YOUR GIVING HISTORY

INSTRUCTIONS

Identify the period of time (e.g., number of years) you will review. In the Gifts Overview table, note the recipients, amounts, and frequency of your contributions during this period. In the Volunteering Overview table, note where you volunteered your time, how much you volunteered, and how often.

The following table reflects my giving history from _____
to _____

GIFTS OVERVIEW

	ORGANIZATION / EVENT / PERSON	AMOUNT / FREQUENCY	IS THIS A ONE-TIME GIFT?
<i>Example</i>	American Red Cross	\$25 / month	No
1			
2			
3			
4			
5			



WORKSHEET
LOOK BACK AT YOUR GIVING HISTORY

VOLUNTEERING OVERVIEW

	ORGANIZATION / EVENT	TIME / FREQUENCY
<i>Example</i>	American Society for the Prevention of Cruelty to Animals (ASPCA)	3 hours / week
1		
2		
3		
4		
5		



WORKSHEET
LOOK BACK AT YOUR GIVING HISTORY

INSTRUCTIONS
Based on your giving history, answer the following questions.

Where did you give the most, in terms of both your financial resources and your time?
Are there similarities among these recipients?

.....
.....
.....

Which issues prompted you to give the most, in terms of both your financial resources and your time? Did you concentrate your giving in any way (for instance, more time to one issue, more money to another)? Do those issues reflect what is most important to you today? You can select from the Issue Cards or write other issues on the blank Issue Cards, and then record them below.

.....
.....
.....
.....

Does your giving reflect your values? If yes, how? If no, why not?

.....
.....

Do you see any other themes or trends in your giving?

.....
.....

D

ACTIVITY SELECT YOUR ISSUES

INSTRUCTIONS

The Issue Cards provide an overview of broad issue categories and include some blank cards for you to write in any other issues that might interest you—for example, a specific issue you already know you would like to fund. Read the Issue Cards and select the issues that you may be interested in supporting.



ACTIVITY ISSUE CARDS

INSTRUCTIONS
Review the front side of the Issue Cards that include the topics below. These cards provide an entry point into an issue. There are also three blank cards so that you can write in any specific causes that might be meaningful to you.

ANIMAL RELATED	ARTS, CULTURE & HUMANITIES	CIVIL RIGHTS & ADVOCACY
DISASTER PREPAREDNESS & RELIEF	EDUCATION	ENVIRONMENT
FOOD & NUTRITION	HEALTH	INTERNATIONAL DEVELOPMENT
LAW & SOCIETY	SOCIAL SERVICES	OTHER
WRITE IN YOUR OWN	WRITE IN YOUR OWN	WRITE IN YOUR OWN



ACTIVITY ISSUE CARDS

INSTRUCTIONS
For the Issue Cards selected, review the backside of the cards and circle any specific focus areas of interest (i.e. special education, cancer), or write in focus areas meaningful to you.

<ul style="list-style-type: none"> ▪ Civil Liberties ▪ Civil Rights ▪ Democracy ▪ Intergroup & Race Relations ▪ Voter Education & Registration ▪ _____ 	<ul style="list-style-type: none"> ▪ Arts & Culture ▪ Arts Services ▪ Historical Organizations ▪ Humanities ▪ Media & Communications ▪ Museums ▪ Performing Arts ▪ Visual Arts ▪ _____ 	<ul style="list-style-type: none"> ▪ Animal Protection & Welfare ▪ Veterinary Services ▪ Wildlife Preservation & Protection ▪ Zoos & Aquariums ▪ _____
<ul style="list-style-type: none"> ▪ Climate Change ▪ Environmental Education ▪ Natural Resources Conservation & Protection ▪ Pollution Abatement & Control ▪ Recycling Programs ▪ _____ 	<ul style="list-style-type: none"> ▪ Adult Education ▪ Elementary & Secondary Education ▪ Graduate & Professional Education ▪ Higher Education ▪ Libraries ▪ Special Education ▪ Vocational & Technical Education ▪ _____ 	<ul style="list-style-type: none"> ▪ Disaster Preparedness & Relief Services ▪ Search & Rescue Squads ▪ _____
<ul style="list-style-type: none"> ▪ International Human Rights ▪ International Peace & Security ▪ _____ 	<ul style="list-style-type: none"> ▪ Diseases & Conditions ▪ Hospitals & Primary Healthcare ▪ Medical Research ▪ Mental Health ▪ Public Health ▪ Rehabilitative Care ▪ Reproductive Health ▪ _____ 	<ul style="list-style-type: none"> ▪ Food Programs & Security ▪ Nutrition ▪ _____
<ul style="list-style-type: none"> _____ _____ _____ 	<ul style="list-style-type: none"> ▪ Children & Youth Services ▪ Fair Employment ▪ Family Services & Assistance ▪ Housing & Shelter ▪ Labor Unions ▪ _____ 	<ul style="list-style-type: none"> ▪ Criminal Justice Reform ▪ Crime Prevention ▪ Law Enforcement ▪ Legal Services ▪ Protection Against Abuse ▪ Rehabilitation Services ▪ _____
<p>WRITE IN YOUR OWN</p>	<p>WRITE IN YOUR OWN</p>	<p>WRITE IN YOUR OWN</p>

D

WORKSHEET
SELECT YOUR ISSUES

INSTRUCTIONS

Review the front side of the Issue Cards. Think about your personal interests, particularly segments of society you want to help, and their specific needs. Then select up to five cards that resonate most with you. Next, review the backs of your selected cards. Circle the focus areas you noted as being of interest (e.g. special education, cancer) or write in focus areas that are meaningful to you. Note any reflections you have in the space on the next page.

E

ACTIVITY CRAFT YOUR FOCUS STATEMENTS

A focus statement frames your values and motivations and connects them with your philanthropic intentions. A strong focus statement can help guide your philanthropic plan. While you may want to have an overall giving statement the same way some nonprofits have vision and mission statements, we recommend also creating a separate focus statement for each issue, including the specific population and location you would like to serve.

EXAMPLE

We aim to address education inequality for low-income secondary school students in Grand Rapids Public Schools because this aligns with our commitment to equity in public education.

INSTRUCTIONS

Craft short statements that articulate your intention for how to address each of your selected focus areas.

If you don't yet feel ready to articulate focus statements, you can return to them later in this toolkit or as you actually engage in giving, recognizing that they may change over time.

If you need additional inspiration, you can look online for various resources on crafting vision, mission, and focus statements. Feel free to borrow from statements that inspire you and rework them to make them your own.

WORKSHEET
CRAFT YOUR FOCUS STATEMENTS

INSTRUCTIONS

Complete the statement below, using your selected Value Cards and Issue Cards to identify the essential components. Craft focus statements for each of your focus areas in the space below.

We aim to address **[WHAT]** for **[WHO]** **[WHERE]** because this aligns with our commitment to **[WHICH VALUES]**.

- WHAT:** What causes/issues do you want to address with your philanthropy (e.g., environment, education, animal-related)?
- WHO:** Who will benefit from your philanthropy (e.g., people experiencing homelessness, children from low-income backgrounds, abused animals)?
- WHERE:** Where, geographically, will you focus your philanthropy (e.g., a specific location, locally, statewide, nationally, globally)?
- WHICH VALUES:** Which values are driving your goal (e.g., respect, diversity, empathy)?

Example:

We aim to address **EDUCATION INEQUALITY** for **LOW-INCOME SECONDARY SCHOOL STUDENTS** in **GRAND RAPIDS PUBLIC SCHOOLS** because this aligns with our commitment to **EQUITY IN PUBLIC EDUCATION**.



WORKSHEET
CRAFT YOUR FOCUS STATEMENTS

Keep these four principles in mind:

- Be specific.
- Use simple language (avoid buzzwords).
- Keep it concise.
- Make it actionable.

1.

We aim to address

for

.....

because this aligns with our commitment to

.....

2.

We aim to address

for

.....

because this aligns with our commitment to

.....



WORKSHEET
CRAFT YOUR FOCUS STATEMENTS

3.

We aim to address

for

.....

because this aligns with our commitment to

.....

4.

We aim to address

for

.....

because this aligns with our commitment to

.....

5.

We aim to address

for

.....

because this aligns with our commitment to

.....

1.3

CONTRIBUTE YOUR TIME, TALENT, AND TIES

When considering levels of donor engagement, you may have heard of the “4 T’s”—Treasure, Time, Talent, and Ties. In this context, treasure is shorthand for financial contributions, time reflects the hours you are able to give, talent refers to your specific skillsets, and ties relate to your social and professional networks.

It is up to you to consider how to balance and deploy these “4 T’s” in your philanthropic endeavors at different periods in your life. There may be intervals when you don’t have much time but are happy to make significant financial donations. There may be other times when you cannot give the lead gift on a campaign but are able to consistently volunteer and make introductions to key people in your social network. Regardless of how you balance your “4 T’s,” there are many organizations that will be delighted to have you involved.

We address financial contributions in **Section 4: Structuring Your Giving** and **Section 6: Making Gifts and Tracking Your Giving**. In this section we focus on the other three T’s: Time, Talent, and Ties.

Continued on the following page.

You might consider deepening your philanthropy by contributing your time and talent through volunteering. Volunteering can be an excellent way to learn more about your focus areas and get to know an organization. You can volunteer with organizations you support financially as well as other organizations. Nonprofit organizations sometimes post information about volunteer positions on their websites. Volunteer commitments can be short-term and focused around a specific event or short-term business goal, or they can be long-term and connected to a series of events, an on-going program, or extended strategic initiatives.

Another way to contribute at a leadership level is to serve on the board of a nonprofit organization. Often, an organization's senior leadership identifies prospective board candidates based on the skills and expertise they can contribute and extends an invitation to join the board. Organizations often ask board members to be "ambassadors" for the organization, willing to tap into their social and professional networks to help the organization more effectively meet its various goals. While board service can be extremely meaningful, it can also be a significant time commitment depending on the organization's needs and the skills and resources other board members bring to the table.

If you are considering volunteering or serving on a board, work through **Activity F**.

For more information on board service, refer to BoardSource in **Additional Resources: Section 1** at the end of the Toolkit.

ACTIVITY

F Consider Your Time, Talent, & Ties

F

ACTIVITY

CONSIDER YOUR TIME, TALENT, & TIES

INSTRUCTIONS

Review the questions in Activity F to consider your interest in contributing your time, talent, and ties to a particular focus area. Jot down your thoughts.

CONSIDER YOUR INTEREST IN GENERAL VOLUNTEER

WORK BY ANSWERING THESE QUESTIONS:

- Is there an issue you would like to learn about through firsthand experience?
- If you have an organization in mind, is that organization accepting volunteers? What responsibilities do volunteers have?
- Does the organization need volunteers with particular skills or experience? Do you have the skills or experience they need?
- What is the time commitment for volunteers at the organization? Are you able to commit your time?

Continued on the following page.

CONSIDER THESE QUESTIONS TO DETERMINE YOUR INTEREST IN BOARD SERVICE:

- Do you have enough time for board service?

Serving as a board member requires more than attending meetings. You will often be expected to serve on one or more committees, read and understand financial documents, represent the organization at various events, and fundraise.

- Are you willing and able to meet fundraising expectations?

Board members are usually asked to make personal contributions as well as raise funds from their personal and professional networks. You may also be asked to network with potential donors on behalf of the organization.

- What skills or expertise do you offer the organization's board? Are your skills or expertise needed?

Board members offer a variety of skills and experience to assist with the overall functions of the board. How you can make a difference in the organization depends on the needs of the organization.

- How might you tap into your personal and professional networks to assist the organization in meeting its goals?

In addition to reaching out to friends and colleagues for fundraising parties or other special events, board members also often tap into their networks to seek advice and mobilize additional skillsets to assist an organization's special projects and initiatives. With the organizations and causes you are interested in, who in your network comes to mind and how might they be most helpful?

FINDING YOUR FOCUS AREAS SUMMARY

Now that you have completed Section 1, turn to the Finding Your Focus Areas Summary on the next page. Fill in the table to outline your selected focus areas. As you complete the yellow EPLI Philanthropy Planner pages at the end of each section, you can tear them out to include in your Philanthropy Planner pocket at the end of the toolkit.

1

EPLI PHILANTHROPY PLANNER FINDING YOUR FOCUS AREAS SUMMARY

INSTRUCTIONS

Review your total philanthropy allocation for a set period of time (e.g., a year or two) to help you better understand your potential impact on an issue, location, or organization. Write the amount in the upper right corner. Your total allocation may help you narrow the number of issue areas you address over a given period of time. Although this amount may change, starting with a draft amount can make this process more practical and concrete. In Section 4, you can work with your advisor to determine your total philanthropy allocation going forward.

<p>YOUR CAUSES Up to 5 issue cards for your focus areas</p>	<p>1 Place Issue Card here</p>
<p>WHO Who will you focus on helping? (e.g., school children, young leaders, people experiencing homelessness)</p>	
<p>WHERE Where will you focus your giving? (e.g., globally, nationally, a specific region)</p>	

1

EPLI PHILANTHROPY PLANNER FINDING YOUR FOCUS AREAS SUMMARY

INSTRUCTIONS

Place your selected Issue Cards on the Section Summary below. If you already know how they rank, you may choose to place the Issue Cards in order from 1 to 5 across the planner. If you have two competing issues, you can choose to make them equal priorities, or prioritize them after you have selected the organizations you would like to fund.

The following table reflects contributions from _____
to _____.

<p style="text-align: center;">2 Place Issue Card here</p>	<p style="text-align: center;">3 Place Issue Card here</p>

1

EPLI PHILANTHROPY PLANNER FINDING YOUR FOCUS AREAS SUMMARY

INSTRUCTIONS

Define your focus areas further by reflecting on the population you want to help (e.g., elementary school children, young community leaders, people experiencing homelessness) and the location where you want to practice your philanthropy (e.g., globally, nationally, a specific region). If you feel that your interest in the issue remains broad, you may leave this blank until you identify possible organizations to support.

TOTAL AMOUNT ALLOCATED:

<p>4 Place Issue Card here</p>	<p>5 Place Issue Card here</p>