

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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J

ACTIVITY

RECOUNT YOUR CONTRIBUTIONS

INSTRUCTIONS

This activity is for those who have made previous contributions to their selected issues.

Recount your previous contributions to understand your giving distribution across your selected issues and the total amount allocated.

Consider adjustments to make your giving more proactive.

Skip ahead to Activities K and L if you prefer to start from a clean slate with your future giving plans.

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

INSTRUCTIONS

Identify the period of time you would like to review (e.g., a year or two) and recount your contributions. Record your contributions during this period in one of the three giving buckets below. Once you are finished, total each bucket. Reflect on these amounts to understand your giving distribution across your selected issues, and consider any adjustments to make your giving more proactive. Finally, total the amounts from each giving bucket to arrive at your total contribution during this period. Reflect on this total and consider any adjustments you want to make for future giving.

GIVING BUCKET 1 – PROACTIVE GIVING

Donations you made to organizations working on your selected issues.

ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Education</i>	<i>Girls Who Code</i>	<i>Yes</i>	<i>Feb.</i>	<i>\$750</i>
TOTAL AMOUNT:				

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

GIVING BUCKET 2 – REACTIVE GIVING Donations you made in response to personal requests from family and friends to support their issues and fundraisers.				
ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Health</i>	<i>Martha's Alzheimer's disease walk</i>	<i>Yes</i>	<i>Dec.</i>	<i>\$250</i>
TOTAL AMOUNT:				

WORKSHEET
RECOUNT YOUR CONTRIBUTIONS

The following table reflects contributions from _____
 to _____.

GIVING BUCKET 3 – EMERGENCY GIVING Donations to disaster and emergency relief funds or to social issues as a result of policy changes.				
ISSUE / FUNDING AREA	ORGANIZATION SUPPORTED	ELIGIBLE FOR DEDUCTION (Y / N / NOT SURE)	DATE / MONTH	AMOUNT GIVEN
<i>Disaster relief</i>	<i>American Red Cross</i>	<i>Yes</i>	<i>Sept</i>	<i>\$500</i>
TOTAL AMOUNT:				

K

ACTIVITY

SET YOUR TOTAL PHILANTHROPY BUDGET

INSTRUCTIONS

Review the questions in Activity K either on your own or with the support of your advisor, and jot down your thoughts. You do not have to answer all the questions.



WORKSHEET

SET YOUR TOTAL PHILANTHROPY BUDGET

INSTRUCTIONS

Reflect on the total philanthropy budget written down in the Section 1: Finding Your Focus Areas Section Summary, or identify a new desired total budget. Review the questions below, either on your own or with the support of your advisor, and jot down your thoughts. You do not have to answer every question.

How much do you wish to allocate to your philanthropy in the next year? Over the next three years? The next five to seven years? The next decade or more?

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.....
.....

What future financial situations or developments could affect how much you allocate to your philanthropy?

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What are the potential tax considerations for your different time horizons?

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.....

Given your current financial circumstances, could you think about allocating more?

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.....



WORKSHEET
SET YOUR TOTAL PHILANTHROPY BUDGET

Are you in a position to consider giving appreciated assets as part of your philanthropy?

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How have you thought about allocating assets for the next generation?

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Would you like to revisit your allocations in the future? If so, when?

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.....
.....

How much are you setting aside as your total philanthropy budget?

L

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

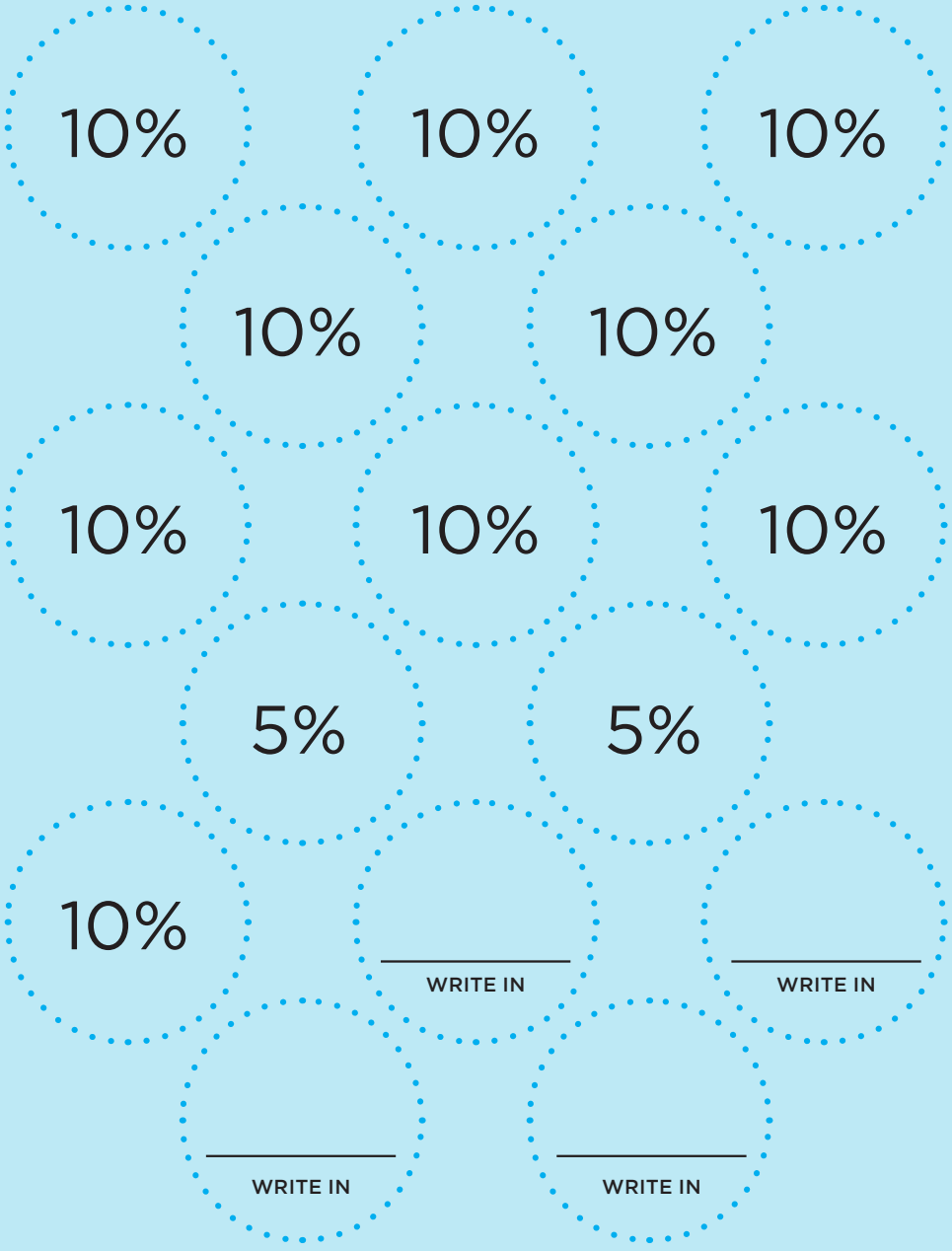


WORKSHEET
ALLOCATE YOUR PHILANTHROPY BUDGET

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.

L

ACTIVITY
BUDGET COINS



REFLECT ON YOUR GIVING VEHICLE OPTIONS

INSTRUCTIONS

Review the list of giving vehicle considerations below. This list is not exhaustive, and we encourage you to speak to your advisor and those involved in your philanthropic decision-making about additional considerations relevant to your personal situation, preferences, and goals.

1. **ADMINISTRATIVE SUPPORT:** Are you willing to invest your time and effort on an ongoing basis and hire paid staff for your vehicle?
2. **ANONYMITY:** Do you prefer to give anonymously?
3. **ASSET GROWTH POTENTIAL:** Would you want your philanthropic investment to increase in value over time?
4. **CONTROL OVER GIVING:** Would you want to retain control over how beneficiaries use donated funds?
5. **DISTRIBUTION REQUIREMENT:** Would you want a vehicle with an annual distribution requirement in place to keep your philanthropy moving?
6. **FAMILY INVOLVEMENT:** Do you want your family members involved in giving decisions?
7. **IMPACT INVESTMENTS:** Would you like to make investments that generate social as well as financial returns? For more information on impact investing, see **Additional Resources: Section 4** at the end of this toolkit.
8. **PERPETUITY:** Do you want the structure to exist in perpetuity or would you prefer it to spend down in your lifetime or some set period of time?

Continued on the following page.

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ACTIVITY

REFLECT ON YOUR GIVING VEHICLE OPTIONS

9. **POLITICAL CONTRIBUTIONS:** Do you want to make political donations and engage in lobbying? Direct political contributions are not tax-deductible, though some lobbying and advocacy can be, depending on a number of factors. Seek further professional advice if politics is a priority issue for you.
10. **PUBLIC DISCLOSURE:** Are you willing to submit separate tax records that will be available to the public?
11. **TAX IMPLICATIONS:** Are tax implications important to your choice of vehicle? To understand how different taxes may be affected by your giving, see **Additional Resources: Section 4** at the end of this toolkit.

REFLECT ON YOUR GIVING VEHICLE OPTIONS

INSTRUCTIONS

Complete the survey below to identify your preferences when choosing a giving vehicle. For each consideration, determine how important it is to your philanthropy. Your responses will be useful when reviewing the EPLI Giving Vehicles Comparison Chart.

CONSIDERATIONS

ADMINISTRATIVE SUPPORT: Are you willing to invest your time and effort on an ongoing basis and hire paid staff for your vehicle?

ANONYMITY: Do you prefer to give anonymously?

ASSET GROWTH POTENTIAL: Would you want your philanthropic investment to increase in value over time?

CONTROL OVER GIVING: Would you want to retain total control over funding decisions?

DISTRIBUTION REQUIREMENT: Would you want a vehicle with an annual distribution requirement in place to keep your philanthropy moving?

FAMILY INVOLVEMENT: Do you want your family members involved in giving decisions?

IMPACT INVESTMENTS: Would you like to make investments that generate social as well as financial returns?

*For more information on impact investing, see **Additional Resources: Section 4** at the end of this toolkit.

PERPETUITY: Do you want the structure to exist in perpetuity?

POLITICAL CONTRIBUTIONS: Do you want to make political donations and engage in lobbying? Direct political contributions are not tax-deductible, though some lobbying and advocacy can be, depending on a number of factors. Seek further professional advice if politics is a priority issue for you.

PUBLIC DISCLOSURE: Are you willing to submit separate tax records that will be available to the public?

TAX IMPLICATIONS: Are tax implications important to your choice of vehicle?

To understand how different taxes may be affected by your giving, see **Additional Resources: Section 4**.



WORKSHEET
REFLECT ON YOUR GIVING VEHICLE OPTIONS

YES	NO	NOT SURE	HOW IMPORTANT IS THIS TO YOU? (1=NOT VERY / 5=VERY)				
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
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<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	1	2	3	4	5

