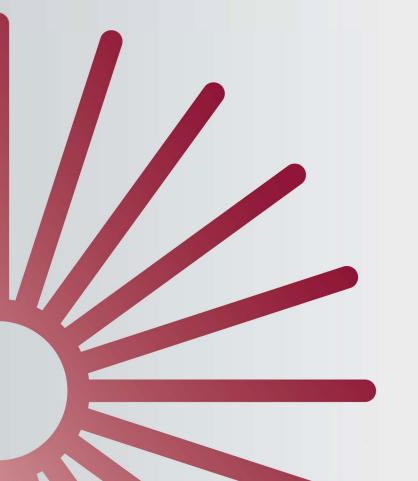
PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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ACTIVITY

REFLECT ON YOUR CONTRIBUTIONS OF YOUR TIME, TALENT, & TIES

INSTRUCTIONS

Review the questions in Activity P to reflect on the time and effort you have contributed to organizations over your past giving cycle. Also consider your responses about your time and talent in Activity F. Jot down your thoughts.

REFLECT ON YOUR GENERAL VOLUNTEER WORK BY ANSWERING THESE QUESTIONS:

- Are you volunteering enough hours per month or year? Do you want to volunteer more?
- Do you feel you have been able to fulfill your volunteering commitments in a meaningful way?
 - If you feel the answer is no, consider how you can scale back your commitment without derailing the organization's work.
- Do you want to continue volunteering for the same organizations? Do you want to add volunteer work with new organizations, or identify different organizations to work with instead?
- If you want to volunteer more, can you get more involved with organizations you already support? Do you need to find more organizations?

REFLECT ON YOUR BOARD SERVICE BY ANSWERING THESE QUESTIONS:

- How do you feel about your current board service? Are you providing value?
 - Gould you contribute your time, talent, and professional or social ties in a more meaningful way?
- If you want to join a new board, how can you find one that matches your interests and expertise?
- Do you need to leave any boards?

 If you feel that the answer is yes, make sure to provide the organization with adequate notice and work with them to support the transition.

P

ACTIVITY

REFLECT ON YOUR CONTRIBUTIONS OF YOUR TIME, TALENT, & TIES



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.

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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.

EPLI PHILANTHROPY PLANNER MAKING & TRACKING GIFTS SUMMARY

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.