

Personal Giving Strategy

Section 1: Values and Interests Assessment

My Core Values:

What principles and beliefs are most important to you? How do these values influence your approach to charitable giving?

Causes I Care About:

What social issues, needs, or causes do you feel most passionate about? Why are these causes meaningful to you?

My Motivation for Giving:

What inspires you to give? Consider both personal experiences and broader motivations.

Giving Priorities:

Rank your top 3-5 giving priorities based on your values and interests.

Resources Inventory:

List all resources you could potentially contribute: time, money, skills, talents, connections, physical items, etc.

Example: My core values include education, equity, and environmental stewardship. I particularly care about educational access for underserved communities, environmental conservation, and animal welfare. My passion for education stems from my own experience with supportive teachers who changed my trajectory, while my interest in environmental causes comes from growing up near a nature preserve. I'm motivated by a desire to create opportunity for others and protect our natural world for future generations. My top giving priorities are: 1) Educational programs for underserved youth, 2) Local environmental conservation, and 3) Animal rescue. Resources I can contribute include: 5-10 hours monthly of volunteer time, \$30-50 monthly in financial contributions, graphic design skills, social media knowledge, and connections to local schools through family members.

Section 2: Giving Plan

2A: Financial Giving Plan

Total Giving Budget:

What dollar amount or percentage of income have you allocated for charitable giving?

Giving Allocation:

*How will you distribute your charitable donations across causes or organizations?
(Example: 50% to education, 30% to environment, 20% to emergency response)*

Giving Frequency:

Select frequency



How often do you plan to make charitable contributions?

Selected Organizations:

Organization Name - Cause Area - Amount/Percentage - Frequency - Rationale

List specific organizations you plan to support, including donation amounts and why you've selected them.

[Insert pie chart or other visual representation of your giving allocation here]

2B: Time Commitment Plan

Volunteer Time Commitment:

How many hours per week/month do you plan to volunteer?

Volunteer Activities:

Organization - Role - Hours/Month - Skills Used

Describe the specific volunteer roles you plan to undertake, including organizations, positions, and time commitments.

2C: Skills Contribution Plan

Key Skills & Talents to Share:

What specific skills or talents could you contribute to causes you care about?

Skills Application Plan:

Skill - Organization/Cause - Application - Time Commitment

Describe how and where you plan to apply your skills to benefit charitable causes.

2D: In-Kind Donation Plan

Planned In-Kind Donations:

Item/Resource - Organization - Timing - Estimated Value

List any goods, materials, or resources you plan to donate, and where they will go.

Tip: Balance your giving plan across different forms of contribution based on your current resources and circumstances. As your situation changes, you can adjust the balance between financial giving, volunteering, skills contribution, and in-kind donations.

Example Financial Giving Plan: I'm allocating 5% of my monthly income (approximately \$150) to charitable giving, distributed as: 50% to education (\$75), 30%

to environmental causes (\$45), and 20% to animal welfare (\$30). I'll use a monthly recurring donation approach for consistent support. My selected organizations are:

- Local Education Foundation - \$75/month - Provides after-school programming in my community
- River Conservation Trust - \$45/month - Protects the watershed where I grew up
- County Animal Shelter - \$30/month - Supports animal rescue and adoption services

Example Volunteer Plan: I'll commit 8 hours monthly to volunteering, primarily at the County Animal Shelter (6 hours/month helping with dog walking and socialization) and occasional special events for the River Conservation Trust (approximately 2 hours/month for cleanup days and fundraisers). **Example Skills Contribution:** I'll use my graphic design skills to create marketing materials for the Local Education Foundation's annual fundraiser (estimated 10 hours spread over 1 month) and my social media knowledge to help the County Animal Shelter improve their adoption promotion (2 hours/month of consulting).

Section 3: Impact Evaluation

How I'll Track My Contributions:

Describe how you'll record and monitor your financial, time, and in-kind contributions.

How I'll Assess Impact:

How will you evaluate whether your contributions are creating the impact you intend? What information will you gather from organizations?

Staying Informed:

How will you stay informed about your chosen causes and the organizations you support?

Review & Adjustment Plan:

How often will you review and potentially adjust your giving strategy? What factors might trigger changes?

Example: I'll track my contributions using a dedicated spreadsheet that records all donations, volunteer hours, and in-kind gifts. I'll request impact reports from the organizations I support and follow their social media and newsletters for updates. To assess impact, I'll look for specific metrics like number of students served by educational programs, miles of riverway protected, and animal adoption rates. I'll

comprehensively review my giving strategy annually in January, but will make adjustments if I notice an organization isn't using funds effectively, if my financial situation changes significantly, or if I discover a new cause that strongly aligns with my values.

Section 4: Giving Timeline

Short-Term Giving Plan (Next 12 Months)

Timeframe	Action/Contribution	Organization/Cause	Resource Commitment

Long-Term Giving Vision (2-5 Years)

My Long-Term Giving Goals:

Describe how you envision your giving evolving over the next 2-5 years as your resources and circumstances change.

Factors That May Change My Giving:

What life changes, resource shifts, or other factors might influence your giving strategy over time?

[Insert timeline visualization of your giving plan here]

Section 5: Reflection

Values Alignment Reflection:

How does your giving strategy align with your personal values? How does it reflect what matters most to you?

Balance with Other Financial Priorities:

How have you balanced charitable giving with other financial goals and responsibilities?

Intended Impact:

What specific difference do you hope your contributions will make in the world?

Strategy Adaptation:

How might your giving strategy evolve as your circumstances and the world change?

Personal Benefits:

How do you anticipate your giving will benefit you personally while also benefiting others?

Section 6: Action Plan

Immediate Next Steps:

List 3-5 specific actions you will take in the next 30 days to begin implementing your giving strategy.

Resources Needed:

What information, tools, or resources do you need to fully implement your giving plan?

Accountability Plan:

How will you hold yourself accountable to your giving goals? Will you involve others in reviewing your progress?

Personal Commitment Statement:

Write a brief statement affirming your commitment to this giving strategy and the values it represents.

Example Immediate Next Steps:

1. Set up recurring monthly donations to my three selected organizations (by May 15)

2. Contact the County Animal Shelter to schedule volunteer orientation (by May 10)
3. Create a spreadsheet to track all contributions (by May 8)
4. Research impact metrics for each organization I support (by May 31)
5. Sign up for newsletters from each organization (by May 8)

Example Commitment Statement: I commit to implementing this giving strategy as an expression of my values and a way to create positive change in areas I care deeply about. I recognize that meaningful giving requires both generosity and thoughtfulness, and I pledge to approach my charitable contributions with intention, consistency, and a genuine desire to make a difference.