

Personal Charitable Giving Plan Worksheet

1. Cause/Organization Selection

What cause or issue are you passionate about?

Why is this cause important to you?

Specific organization(s) you might support (if known):

Tips: Choose a cause that genuinely matters to you. Your giving will be more meaningful and sustainable when it connects to your personal values and interests.

Example: *I'm passionate about education access for underserved communities because I believe education is the foundation for opportunity and social mobility. I might support the local tutoring program at Washington Community Center that provides free academic support to students from low-income families.*

2. Type of Contribution

What type(s) of contribution do you plan to make? (Check all that apply)

☐

Monetary donation

☐

Volunteering (time)

☐

In-kind donation (goods or services)

☐

Planned giving (future arrangements)

Details for each contribution type:

Monetary Donation Details:

Specify amount, frequency (one-time, monthly, etc.), and method of giving (direct donation, crowdfunding, etc.)

Volunteering Details:

Specify hours per week/month, type of activities, specific role, or skills offered

In-Kind Donation Details:

Specify what goods or services you plan to donate, how often, and estimated value

Planned Giving Details:

Specify any future giving arrangements you're considering

Tips: Consider a combination of different contribution types based on your resources and skills. Even small monetary donations, when paired with volunteering, can create significant impact.

3. Giving Goals

Short-term goals (next 3-6 months):

Long-term goals (next 1-5 years):

What impact do you hope your contributions will make?

Tips: Set SMART goals that are Specific, Measurable, Achievable, Relevant, and Time-bound. For example, "Volunteer 4 hours per month at the food bank for the next six months" is more actionable than "Volunteer when I have time."

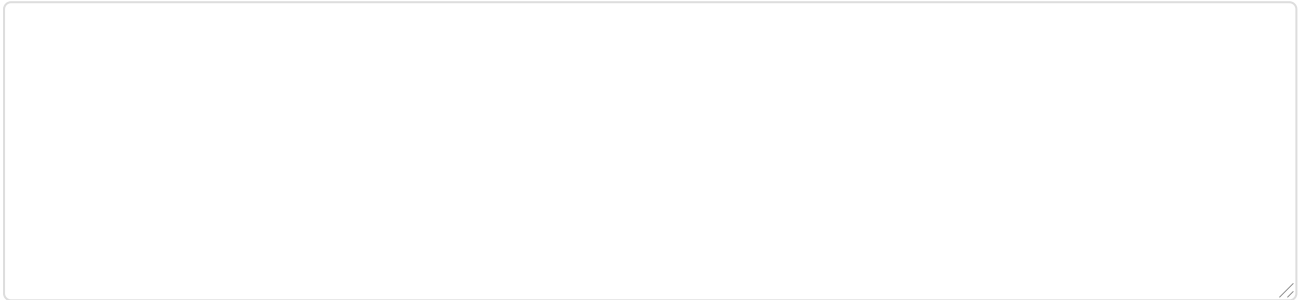
Example Goals:

- *Short-term: Donate \$15 monthly to the local education foundation and volunteer twice per month as a tutor at Washington Community Center*
- *Long-term: Increase my giving to 3% of my income after graduation and organize an annual fundraiser for education access*
- *Impact: Help provide academic support to at least 10 students this year, contributing to improved academic outcomes and confidence*

4. Giving Strategy Explanation

Write a paragraph explaining your giving strategy, including:

- Why you chose this particular cause
- How you plan to contribute
- What impact you hope to make
- How this plan fits into your overall financial or personal goals



Tips: Your explanation should reflect thoughtful consideration of your values, resources, and intended impact. Consider how your giving strategy might evolve as your circumstances change.

5. Implementation Plan

What specific actions will you take in the next 30 days to begin implementing your giving plan?

What potential barriers might you face, and how will you overcome them?

When and how will you review and adjust your giving plan?

Tips: Begin with small, achievable steps that you can build upon. Schedule regular reviews of your giving plan to assess its effectiveness and make adjustments as needed.

6. Reflection

How does this giving plan align with your personal values and priorities?

How might this giving plan benefit you personally while also benefiting others?

How might your giving plan evolve over time as your circumstances change?