

Developing a Personal Philanthropy Plan

HOW TO DECIDE WHERE TO GIVE

Making decisions about where to direct your charitable gifts may be an activity that you are well practiced at or it may still be very new to you. You may have questions about how to start making these important choices.

This simple guide will help you begin to think about that process. We're not telling you where to give; rather, we're going to ask you a series of questions to help you identify what is important to you and explore the range of options available. You'll find additional resources at the end, should you want to explore this more deeply.

Where to begin:

The first question is: *What do you care about?*

Knowing what you value, what you are passionate about, or the change that you'd like to see happen in the world, is the first step in determining how to use your personal resources of money, time and energy. Your charitable gifts are an extension of yourself.

1. What issues or populations are important to you? (See "Issue Areas and Populations" page 4.) What are your top three?
2. What are your values (belief, mission, philosophy)? (See "Values" page 5 for ideas.) What are your top three?
3. Do you see a relationship between your values and the issues or populations that are important to you?

Examples:

I care about health care and medical research and my values are innovation and compassion. I look to support organizations working to find cures to the diseases that have touched my family and friends.

My values are integrity, respect and diversity and I care about youth development. I support organizations that work with youth around anti-racism, native people's rights and support for gay and lesbian youth.

Community stewardship is important to me. I look for organizations working where I live.

Understanding what different groups offer:

Nonprofit organizations tackle community problems and issues in many different ways. This diversity of approaches creates the ability within a community to address immediate need as well as bring about institutional and cultural change to address the root cause of the problem. The different approaches to addressing issues include:

- Human or direct service – providing a service to an individual that addresses their immediate concern this could be food, shelter, clothing, health care, or other need.

- Advocacy and public policy - working to create awareness about an issue and its impact and helping to influence public policy that can alleviate the problem or work toward long-term solutions.
- Empowerment and leadership development – developing the voice and the capacity of people directly impacted by an issue to be involved in determining how best to solve an issue.
- Community organizing – bringing large groups of people together to address common issues.
- Research – getting the scientific facts to better understand an issue or medical research to understand and/or find a cure.
- Legal action – using the law to protect against or remedy an injustice.

An organization might use a variety of strategies to fulfill its mission. Many organizations working on the same issue will employ different strategies, as they bring their particular strengths and focus to an issue. So don't be surprised to see an arts organization doing community organizing, an environmental group working on empowerment and leadership development, and a human service provider advocating as well as providing direct service.

4. Is there an approach to addressing community issues that more closely aligns with your values than another?

5. How broadly would you like your gift to reach?

- Consolidate your contributions by giving to a small set of organizations (1-3).

Choosing individual organizations that match your values and interests is a very effective way to meet your needs and build a relationship with those few organizations.

- Contribute to a broad range of projects and programs or to groups in a specific community

Giving through a federation, where you have the ability to reach a wide range of organizations and their projects and programs, is a very effective way for you to have a broad reach and impact, as your gift is combined with others that have chosen the same option.

6. Research – use the web sites of the participating funds and federations to learn more about their work and the organizations they support. Use the search tool on the left to quickly find the federations and access their websites or check out the [participating funds and federations](#) where you will find a description of their work and the types of organizations they support. Use the search too to also find organization by issue area, geography, and name.

If you'd like some help matching your interests with specific organizations, we'd be happy to help, call (503-636-4058) or [email us](mailto:cmoteam@earthlink.net) at cmoteam@earthlink.net

DEVELOPING A GIVING PLAN: Taking your goals and creating a plan

If you have a life partner or spouse, you may want to think through the questions above together and develop a joint plan. This can also be an excellent project to do with children, as the whole family learns what is important to them, including them in the decision-making process. See other resources below for additional information on how to develop a personal giving plan.

The answers to the questions above begin to form your giving plan. It can help you narrow down the type of issues and organizations you want to support. Creating a plan, along with a budget (discussed below) can help you be more effective in meeting your philanthropic goals and having the impact you want in the community.

TAX BENEFIT

If you itemize your deductions rather than taking the standard deduction on your tax return, you know

charitable contributions are one of a number of items that together make up your itemized deduction. You get a tax benefit as well as the opportunity to help support good work in the community. For tax advice, see your accountant.

ESTABLISH A BUDGET:

- A budget gives you a framework to make decisions and works hand in hand with your giving plan.
- A budget gives you an easy way to track your contributions throughout the year

Some questions to think about:

1. How much did you contribute in the last year or the previous year?
2. Would you like to give more? If so, how much (\$ amount or % of earnings)?
3. Can you afford to give more this year?

Ways to increase your charitable giving without stretching your budget:

- Many of us find it hard to write a large check to an organization – giving a payroll contribution allows you to make smaller monthly gifts that add up to a very significant contribution over the course of the year. Other monthly giving programs using a credit card or electronic funds transfer achieve the same result.
- Having a giving plan and sticking to it.

YOUR RELATIONSHIP WITH THE ORGANIZATIONS YOU SUPPORT:

The Charitable Fund Drive offers donors the ability to be acknowledged by the recipient organization(s). However, you do have the option to remain anonymous. To do so, check the box under the line requesting your name and address.

Giving anonymously may be important to you and the campaign will respect your choice. However, if you are interested in learning more about the issues or organizations you support, receiving updates from the organizations you support can be an easy way to see how they are putting community support to work.

You may also want to consider offering your time and talents as well as your money. Your participation as a volunteer makes a vital contribution to society and you'll find that it holds many benefits to you as well: skill building, social involvement, education, and personal satisfaction.

Issue Areas and Populations

As part of the Charitable Fund Drive, there are organizations addressing the following issues or populations. This is not an exhaustive list, there may be other issues or populations that are important to you.

AIDS	Girls
Animals	Healthcare
Anti-Racism	Homelessness & Housing
Art & Art Institutions	Human Rights
Boys	Immigrant & Refugee Rights and Services
Child Abuse	Legal Aid
Children	Medical Research
Civil Rights	Native & Indigenous People's Rights
Community Development	Philanthropy and Volunteerism
Community Gardens	Poverty
Conservation	Prison Reform
Corporate Responsibility	Public Policy/Advocacy
Disability Rights	Reproductive Rights
Disaster Relief	Seniors
Drug and Alcohol Abuse	Spiritual Development
Domestic Violence	Sports
Economic Justice	Sustainable Development
Education	Women's Rights
Environment	Youth Development
Environmental Justice	
Gay, Lesbian, Bisexual, Transexual, Transgender	

What are your top three issues?

- 1.
- 2.
- 3.

Values

A list to help you begin to identify your personal values.

Acceptance	Family	Opportunity
Accountability	Fun	Peace
Beauty	Good will	Preservation
Challenge	Global view	Respect
Collaboration	Harmony	Responsibility
Commitment	Healing	Service
Communication	Honesty	Simplicity
Community	Honor	Stewardship
Compassion	Independence	Transformation
Cooperation	Integrity	Trust
Courage	Interdependence	Truth
Creativity	Innovation	Wisdom
Democracy	Joy	
Dignity	Justice	
Diversity	Knowledge	
Equality	Love	
Faith	Meaning	
Fairness	Merit	

What are your top three values?

- 1.
- 2.
- 3.

OTHER RESOURCES FOR PROSPECTIVE DONORS:

Inspired Philanthropy, Creating a Giving Plan, A Workbook by Tracy Gary, Melissa Kohner, Nancy Adess, Chardon Press

Donor Bill of Rights (below)

The Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits. It has been endorsed by numerous organizations.

The Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.