

# Create your charitable plan

## Phase 1: Preparation

Determine your values and establish your personal mission statement with **the five P's of values-based philanthropy: People, Places, Problems, Pathways, Philosophies.**

### People:

What is the specific demographic you want to impact with your giving (e.g., school-age children, young women, elderly)?

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### Places:

Where do you want your giving to make a difference (e.g., locally in your community, a large city, a country)?

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### Problems:

Can you narrow down your interest area to a specific problem (e.g., access to clean water, gender and income inequality)?

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### Pathways:

What process do you want to use to effect change (e.g., advocacy, education, direct service)?

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### Philosophies:

What philosophical viewpoints inform your decision making (e.g., inclusion, religion, intersectionality)?

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### Craft your personal mission statement:

Philanthropy is an extension of your values and belief system. Consider: What is the purpose of your wealth? Why do you want to give to charity? How do you want to be remembered? What impact do you hope to achieve with your giving legacy?

### Draft your mission statement below:

### Resources:

Philanthropy can be about your time, talent, and treasure. What does that look like to you? How do you want to experience your philanthropy?

**Time:** How can you give of your time through volunteering, advocacy, or mentoring?

**Talent:** How can you tap into skills from your personal or professional life to make a difference for a charity?

**Treasure:** How will you financially support your chosen charities?

## Create your giving tools and set benchmarks:

To understand and document your giving goals and set appropriate benchmarks, take time to consider your short- and long-term capabilities, your financial resources and tax needs, and the most effective model of giving.

### Short-term (3–5 years)

*Example: Volunteer with X organization as a family once a month.*

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### Mid-term (6–10 years)

*Example: Increase quarterly giving from donor-advised fund to \$X.*

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### Long-term (10+ years)

*Example: Fund a significant capital improvement through a large, multi-year grant to X charity.*

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## Determine who will be involved and how you will measure success:

Do you want your heirs to continue your giving legacy? If so, how? How and when will you communicate to them?

How will you monitor commitment to your mission over time? How will you measure success?

How often will you review the plan (e.g., semi-annually, annually)?

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## Phase 2: Execution

Now that you have identified the cause areas you want to impact, you can create a specific granting plan and identify organizations that match your core values.

### Personal issues and causes:

- 1.
- 2.
- 3.
- 4.

### Family issues and causes:

- 1.
- 2.
- 3.
- 4.

### Financial planning:

**Granting tools:** *(Check all that apply)*

- Direct giving    Donor-advised fund    Private foundation    Personal fundraising    Pooled giving

### Granting cadence:

- Monthly    Quarterly    Semi-annually    Annually

### Yearly giving goals:

Year one (20\_\_\_\_):

Year two (20\_\_\_\_):

Year three (20\_\_\_\_):

Year four (20\_\_\_\_):

Year five (20\_\_\_\_):

\$\_\_\_\_\_ or %\_\_\_\_\_ saved each year for future giving

## Candidates for charitable giving:

Use the worksheet to help evaluate and choose charitable organizations based on values.

1. In the *Candidates for charitable giving* spreadsheet on the next page, fill in the values you aim to share with the organizations you support in the [top blue row](#).
2. Use the GuideStar National Nonprofit Directory linked to your online account to find charitable candidates, if you don't already have them.
3. List charities in the [green column](#).
4. Rank each charity 1–10 based on the degree to which they share your values in their mission as well as their programs.
5. Sum each row in the gray column to determine the charities' alignment with your values."

### Sample Candidates for charitable granting spreadsheet:

		Shared values					TOTAL
		Equity	Governance	Environment	Financials	Board diversity	
Organizations	Charity A	6	8	5	9	7	35
	Charity B	9	8	6	9	9	41
	Charity C	10	6	9	9	8	52

Causes: *(List your causes from above here)*

Candidates for charitable giving: *(Rank each 1–10)*

		Shared values					TOTAL
Organizations							