

EXERCISE 7.1

Your Funding Areas

20 minutes

Step 1. Write your mission statement from Exercise 4.1 in Chapter Four.

Mission Statement:

Step 2. Write the total amount of money you've decided to give and the amount of time you plan to volunteer.

Total Giving Plan for _____ (year)

Financial donations: _____

Volunteering: _____

Step 3. Look at your mission statement. Think about concrete work and strategies that will make it a reality. It may help to look back at the work you did in Chapter Two on identifying your top priority interest areas (Exercise 2.3), though these may have changed as a result of the subsequent exercises. It will also help to review the exercises you did in Chapter Three: the characteristics of your past funding (Exercise 3.1) and your analysis of creating a better world (Exercises 3.2 and 3.3).

Now list no more than five areas of funding. Limiting yourself to five main areas, or fewer, perhaps three, will help to maintain focus and attention.

Areas of Funding

1. _____
2. _____
3. _____
4. _____
5. _____

EXERCISE 7.1 continued

Step 4. Now think about whether prioritizing your choices will make your strategy more effective. If so, rewrite your list in priority order.

Areas of Funding

1. _____
2. _____
3. _____
4. _____
5. _____

Step 5. From the total amount of money you've decided to donate, allocate a percentage to each area based on your assessment in Step 4 of the importance of each to your mission. Then translate each percentage into a dollar amount. For an example, see the sample giving plan for \$8,400 in Chapter Eight. The family's strongest interest is in civil rights, so they allocate 47 percent of their giving budget to civil rights groups. They're also concerned about death and dying and alternative medical and spiritual care, so 30 percent of their giving goes to organizations whose missions are in this area. Their final area of interest is educational opportunity and support, so they give 23 percent of their financial donations to literacy and other educational endeavors.

Final Areas of Funding (in priority order if applicable)

	Amount	Percentage
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____