

EXERCISE 8.1

Your Giving Plan

30 minutes or more

The plan you create should cover one year, starting now. Once you have a plan drafted, try it out for the whole twelve months and then evaluate and refine as necessary. Use a copy of the blank Giving Plan (Worksheet 8.1) that follows to do this exercise.

Step 1. *Transfer the answers to Exercise 7.1 in Chapter Seven to your draft Giving Plan, including your mission statement, the total amount of money you've decided to give, and your areas of funding and volunteering.*

If there are other areas you want to include, such as gifts to family and friends and tickets to fundraising events and dinners, add them here. You may also want to include a miscellaneous category, where you give yourself room to make spontaneous or whimsical gifts, and where you can respond to good work and urgent needs that may require a quick reaction. There are moments in history when we are simply called to consider different approaches or engage in spontaneous acts of heartfelt (inspired) giving. These are instances when timing and societal change converge. For example, if violence were to break out in your city or town, you might want to make a donation to help support conflict resolution efforts, or volunteer some hours if you have skills that could help.

Step 2. *On the basis of the research you did in Chapter Seven, where possible, designate specific groups you want to give to. If you haven't decided on all the groups you may want to include in a particular funding area, place a question mark where you need more information (see the sample individual giving plan for \$2,500 in this chapter). The goals of the groups you choose should help accomplish your own giving mission. Think here about the balance of small, medium, and large organizations and the distribution of local, statewide, regional, national, and international groups.*

This one step will immediately help you to deal with the many requests that come in the mail or on the phone. If a request would fit in this column, consider it. If it doesn't but it still speaks to one of your values, consider whether you want to give to it through your miscellaneous whimsy category. If neither is the case, throw it away.

Step 3. *Indicate dollar amounts you will give to each group.* If there's more than one group you want to give to in a given area, think about how you want to distribute the amount of money you've allocated to this area among the groups you've listed. There are some strategic points to consider for each organization: Would your dollars be most effective to the organization in a large or small gift? If you can do so, making a large gift of \$250 to \$5,000 may be crucial to the survival of some fledgling organizations. A local group may do more with \$100 than a national organization can do with \$500. For some colleges and high schools with multi-million-dollar capital campaigns, alumni participation at any level may be more important than the size of the gift.

Experiment with different amounts and give yourself permission to make mistakes with gifts. If you learn that something you did wasn't right, you'll find out more clearly what does suit you.

Step 4. *Decide how much time you want to volunteer in each area.* In the column for Volunteer Hours, write in a number of hours per week or month you would like to donate as a volunteer for particular groups. Your volunteer time may also go to organizations you do not support financially. (Add these to the list of groups within each area of funding.)

Also, decide if you're going to volunteer on a regular basis—say, a weekly stint answering phones or attending a monthly board meeting—or a seasonal basis—say, planning a fundraising event or helping write grant proposals at certain times of the year.

Step 5. *Decide on your funding cycles.* When are you going to make your funding decisions and write your checks: will you do it once, twice, or four times a year; in the spring, the fall, at the New Year, on your birthday? Or will you decide whenever asked? In choosing your cycles you might consider times of the year you have a tight cash flow, tax time, heavy request times, and times when dinners and events seem to cluster. Once you've decided when you'll give, give yourself permission not to make any gifts outside of your giving cycles. Write the date of your funding cycles at the top of the column, and then write in when you plan to write a check or otherwise give to a group.

Step 6. *Add any relevant notes.* Use the notes column to record names of contacts, previous gifts you made to this group, or other information pertinent to your gifts of money and time. This might include information such as whether the gift is to an organization with local, regional, national, or international reach, which strategy the work is focusing on, and other choices you have made.