



YOUR FINANCIAL JOURNEY COULD

CHANGE THE WORLD

A PHILANTHROPIC PLAN WORKBOOK

FOREWORD



TO GIVE AWAY MONEY IS AN EASY MATTER AND IN ANY MAN'S POWER. BUT TO DECIDE TO WHOM TO GIVE IT AND HOW LARGE AND WHEN, AND FOR WHAT PURPOSE AND HOW, IS NEITHER IN EVERY MAN'S POWER NOR AN EASY MATTER.

– Aristotle



WHAT DO YOU THINK ABOUT WHEN YOU HEAR “PHILANTHROPY”?

Your answer will likely be different from the next person. It is a word that conjures many different thoughts and feelings. At Longview, we would argue that it is a word with many different acceptable definitions because it is unique to who we are as individuals. Many of us have set out on our own philanthropic journey—whether intentional or not. Most of us can remember a time when we have given of ourselves, either in our time, talents or treasures. Regardless of where you are on that journey, intentionality will improve the end result.

What follows is a seven-step process to help you create your own personal philanthropic plan. This guide was created with a belief in three primary principles:



Identifying what motivates you creates purpose



Writing and clearly articulating goals brings focus and action



Reviewing and adjusting for successes and failures creates long term results

STEPS TO CREATE YOUR

PERSONAL PHILANTHROPIC PLAN



1



UNDERSTAND
YOUR CORE
VALUES

2



DISCOVER
YOUR
PASSIONS

3



IDENTIFY
YOUR
MOTIVATIONS

4



SEEK OUT
OPPORTUNITIES

5



SET
GOALS

6



CREATE AN
ACTION PLAN

7



REFLECT ON
PROGRESS



STEP | ONE

CORE VALUES

Place a check mark beside the values that are the most important to you.

- | | | |
|-------------------------------------|-------------------------------------|---|
| <input type="checkbox"/> ACCEPTANCE | <input type="checkbox"/> FAITH | <input type="checkbox"/> OPPORTUNITY |
| <input type="checkbox"/> AFFECTION | <input type="checkbox"/> FAMILY | <input type="checkbox"/> PASSION |
| <input type="checkbox"/> BRAVERY | <input type="checkbox"/> GENEROSITY | <input type="checkbox"/> PEACE |
| <input type="checkbox"/> COMMUNITY | <input type="checkbox"/> GRATITUDE | <input type="checkbox"/> PRESERVATION |
| <input type="checkbox"/> COMPASSION | <input type="checkbox"/> HEALING | <input type="checkbox"/> RESPECT |
| <input type="checkbox"/> COURAGE | <input type="checkbox"/> HONESTY | <input type="checkbox"/> RESPONSIBILITY |
| <input type="checkbox"/> CREATIVITY | <input type="checkbox"/> HUMILITY | <input type="checkbox"/> SERVICE |
| <input type="checkbox"/> CURIOSITY | <input type="checkbox"/> INNOVATION | <input type="checkbox"/> STEWARDSHIP |
| <input type="checkbox"/> DIGNITY | <input type="checkbox"/> INTEGRITY | <input type="checkbox"/> TRUST |
| <input type="checkbox"/> DIVERSITY | <input type="checkbox"/> JOY | <input type="checkbox"/> TRUTH |
| <input type="checkbox"/> EMPATHY | <input type="checkbox"/> JUSTICE | <input type="checkbox"/> WISDOM |
| <input type="checkbox"/> EQUALITY | <input type="checkbox"/> KNOWLEDGE | <input type="checkbox"/> OTHER: |
| <input type="checkbox"/> EXCELLENCE | <input type="checkbox"/> LOVE | <input type="checkbox"/> OTHER: |
| <input type="checkbox"/> EXCITEMENT | <input type="checkbox"/> LOYALTY | <input type="checkbox"/> OTHER: |

From the values you have selected above, list your top 3-5 choices in the fields below.

● _____	● _____
● _____	● _____
● _____	



STEP | TWO

PASSIONS

Place a check mark beside the passions with which you most identify.

- | | |
|--|---|
| <input type="checkbox"/> ANIMALS | <input type="checkbox"/> INTERNATIONAL POVERTY |
| <input type="checkbox"/> ADDICTION | <input type="checkbox"/> LAND PRESERVATION |
| <input type="checkbox"/> ARTS | <input type="checkbox"/> LITERACY |
| <input type="checkbox"/> BUSINESS DEVELOPMENT | <input type="checkbox"/> MEDICAL RESEARCH |
| <input type="checkbox"/> CHILDREN & YOUTH | <input type="checkbox"/> NATIONAL PARKS |
| <input type="checkbox"/> COMMUNITY DEVELOPMENT | <input type="checkbox"/> POVERTY |
| <input type="checkbox"/> DISASTER RELIEF | <input type="checkbox"/> PUBLIC POLICY/ADVOCACY |
| <input type="checkbox"/> DOMESTIC VIOLENCE | <input type="checkbox"/> RELIGION |
| <input type="checkbox"/> EDUCATION | <input type="checkbox"/> SCIENCE & TECHNOLOGY |
| <input type="checkbox"/> ENVIRONMENT | <input type="checkbox"/> SPIRITUAL DEVELOPMENT |
| <input type="checkbox"/> HEALTH | <input type="checkbox"/> SPORTS & RECREATION |
| <input type="checkbox"/> HOMELESS & HOUSING | <input type="checkbox"/> VETERANS |
| <input type="checkbox"/> HUMAN SERVICES | <input type="checkbox"/> WOMEN |
| <input type="checkbox"/> HUMAN RIGHTS | <input type="checkbox"/> OTHER: |

From the passions you have identified above, list your top 3 choices in the fields below.

● _____
● _____
● _____

These lists were compiled with influence from:
Gary, Tracy. (1998). *Inspired Philanthropy*. Jossey-Bass Publishers.



STEP | THREE

MOTIVATIONS

Next, we will link your core values and passions. Identifying your motive for giving and how you would prefer to approach giving is an essential step to creating impact.

Are there links between your core values and your passions?

WHO? Considering your core values and passions, is there a particular demographic you can help?

WHERE? Do you have the desire to make an impact locally, nationally, or globally?

WHAT? Is there a certain issue you want to address or legacy you want to leave?

WHY? What inspires you to give?

HOW? How do you feel you can make the most impact?

- ◇ Make a change through direct service.
- ◇ Advocate for causes that matter to you.
- ◇ Increase awareness around an issue.
- ◇ Use technology and innovation to solve issues.
- ◇ Fund scientific research.
- ◇ Support non-profits that increase quality of life.
- ◇ Other

Create a Giving Purpose Statement.

A giving purpose statement provides clarity around your giving mission and should be a filter for all philanthropic opportunities, allowing for your giving to be more impactful. Consider your core values, passions, and motivations.

Example: "I want to give a voice to those who have none. Therefore, I will focus my philanthropy on non-profits that serve and protect children and animals."



STEP | FOUR

OPPORTUNITIES

The next step is to seek out opportunities that match your giving statement. Consider what non-profits, government organizations, or other philanthropists are already doing. Are there opportunities for collaboration or areas not being addressed where you can assist? You may find that working through a local organization allows you to partner with other non-profits and philanthropists to accomplish similar goals.

We encourage you to consider the following resources for researching philanthropic opportunities that accomplish the goals you have identified:

LOCAL COMMUNITY FOUNDATION

You will find specialists who understand local giving opportunities and are working with many non-profits in your geographical area.

GUIDESTAR.ORG

Provides a variety of details about non-profits so that donors are able to make the best decision. Some examples of data available include: mission statements, financial data, and impact summaries. You will be able to search for any issue area and refine a search to ensure your donations match your goals and values.

CHARITYNAVIGATOR.ORG

Allows you to search for charities by category and filter by rating, size, scope of work, and program data.

GREATNONPROFITS.ORG

Will help you find non-profits in cities across the United States. If you are interested in giving locally, this website allows you to filter by issue area for a list of opportunities in your city and surrounding areas.

CHARITYWATCH.ORG

Focuses on how a charity uses donations and advocates for their donors. They provide a list of top-rated charities, along with relevant options for donations involving current world needs.

YOUR LOCAL CHAMBER OF COMMERCE

Check with your local Chamber for volunteer and giving opportunities.



**GREAT PHILANTHROPY IS
DISTINGUISHED NOT BY THE
SHEER SIZE OF THE GIFT
OR GRANT, BUT BY WHAT IT
ACCOMPLISHES.**

— Tierney and Fleishman,
[Give Smart](#)





STEP | FIVE

GOALS

It is now time to bring steps one through four together to determine the specific goals you want to achieve and what success looks like for you.

What is the end goal?

Look ahead to the next few years. Target one to three goals. Then, break those goals down further into one to three attainable, 12-month, or shorter-term goals. The more specific the goal, the more likely you are to succeed with measurable results.

Example: In three years, Sally wants to have created a sustainable after-school education program focused on empowering high school girls by teaching them leadership skills. She breaks down her three-year goals as follows:

- ◆ **Year 1**
Work with the local Community Foundation to find sources of funding. Identify at least five large sources of funding and develop a budget.
- ◆ **Year 2**
Create leadership-focused curriculum. Identify at least two staff members and four volunteers.
- ◆ **Year 3**
Train and implement. Complete the year with at least one graduating class of ten high school girls.

BE VERY INTENTIONAL IN YOUR DECISION ABOUT WHERE YOU GIVE YOUR TIME, MONEY AND TALENTS, SET EXPECTATIONS OF SUCCESS AND HOLD YOURSELF ACCOUNTABLE FOR THOSE SUCCESSES.

What are the boundaries of your resources?

Consider your willingness to give of your time, talents, and treasures. Create a budget around each of these areas.

Example: Sally decides to create the following budget for her philanthropic resources: 10% of her time, 10% of her talents and 10% of her treasures.

What is the time horizon for achieving the goal?

It is important to acknowledge a time frame in which you feel the goal should be accomplished. This can be a tool to monitor the success of your giving. If you feel progress is not being made, it may be time to reassess the goal or expectations.

Example: Sally has identified her three-year goal and further broken that down into 12-month goals. After the first year, she feels there is a greater need to teach financial literacy skills than leadership skills; therefore, she changes her attention toward the greater need.



STEP | SIX

ACTION PLAN

On this page, you will carry over your previously listed core values, passions and giving purpose. Use the blanks provided to fill in the specified goal with time horizon and budget, talent or time commitment.

ACTION PLAN FOR THE YEAR OF _____ ●

STEP 1 | CORE VALUES

● _____

_____ ●

STEP 2 | PASSIONS

● _____

_____ ●

STEP 3 | GIVING PURPOSE

● _____

STEP 4 AND 5 | 12 MONTH GOALS

Goal 1 _____ ●
Time Horizon _____ ●
Budget/Talent/Time _____ ●
Goal 2 _____ ●
Time Horizon _____ ●
Budget/Talent/Time _____ ●
Goal 3 _____ ●
Time Horizon _____ ●
Budget/Talent/Time _____ ●

STEP | SEVEN

REFLECTION



Monitoring the plan on at least an annual basis ensures that you are on track to fulfilling your giving purpose. This is a tool to hold yourself responsible for achieving philanthropic goals you have set and for determining if your current approach is the most effective way to achieve goals. As part of your reflection, interview the non-profits with which you work and refer to the list of resources in Step Four to ensure that the non-profits you've aligned yourself with are meeting the needs and goals you've identified and using their resources wisely.

Did I accomplish my previous year's goals?

● _____

What were the successes?

● _____

What were the challenges?

● _____

Should there be changes based on the successes/challenges?

● _____
_____ ●



READY TO MAKE AN IMPACT?

LET US HELP!

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