

PHILANTHROPIC ADVISING

RESOURCES FOR PLANNING

The Community Foundation works with you using the tools in this workbook to align your giving with your vision for a better community and world.



COMMUNITY FOUNDATION
OF WESTERN MASSACHUSETTS

My Philanthropic Values

What motivates my giving? What matters to me when I give?

Circle all the words that represent what is important to you in giving or volunteering.

Obligation to give back	Prestige, Recognition	Challenge	Using my Talent or Experience	Control	Competition
Healing	Supporting Underfunded Needs	Being a Good Steward	Giving to Lead a Simpler, Meaningful Life	Approval	Service
Intellectual Stimulation	Independence	Giving During Lifetime	Working with my Hands	Getting Outdoors	Leadership
Working with Children	Variety, Social Stimulation	Passion	Education of Next Generation	Working with numbers	Trust
Inspiration	Pursuing Social Justice or Equality	Joy	Want my gift to be large for the organization	Impact	Influencing Others
Setting an Example for my Family	Being a Patron of the Arts	Respect	Collaboration Teamwork	Helping Local Community	Leverage my Donations
Anonymity	Building a Legacy	Innovation	Seeing Outcomes, Impact	Being a Caregiver or Mentor	Working with Technology
Travel	Giving because of an Inspirational Leader	Giving from the Heart, not for Results	Personal or Professional Relationships	Faith in action	Helping Global Community

Identify the top three giving values that matter most to me:

- 1.
- 2.
- 3.

My Philanthropic Causes

What do I care about? What issues keep me up at night?

It is critical for your philanthropic plan to identify the change you want to see in your community or our world.

Using the Picture your Legacy card deck or iphone app you can view and respond to images that correspond with your interest areas. (done in person in our planning sessions)

Or, on the following page, you can review the taxonomic tree of philanthropy to help you identify and consider the specific issue areas you may have in your philanthropy.

You may never have donated to these issue areas; the list is simply meant to provide inspiration and to give you a chance to recognize what holds meaning for you among the possible things you could support with your time and gifts.

Identify the top three philanthropic issues/interest areas that matter most to me:

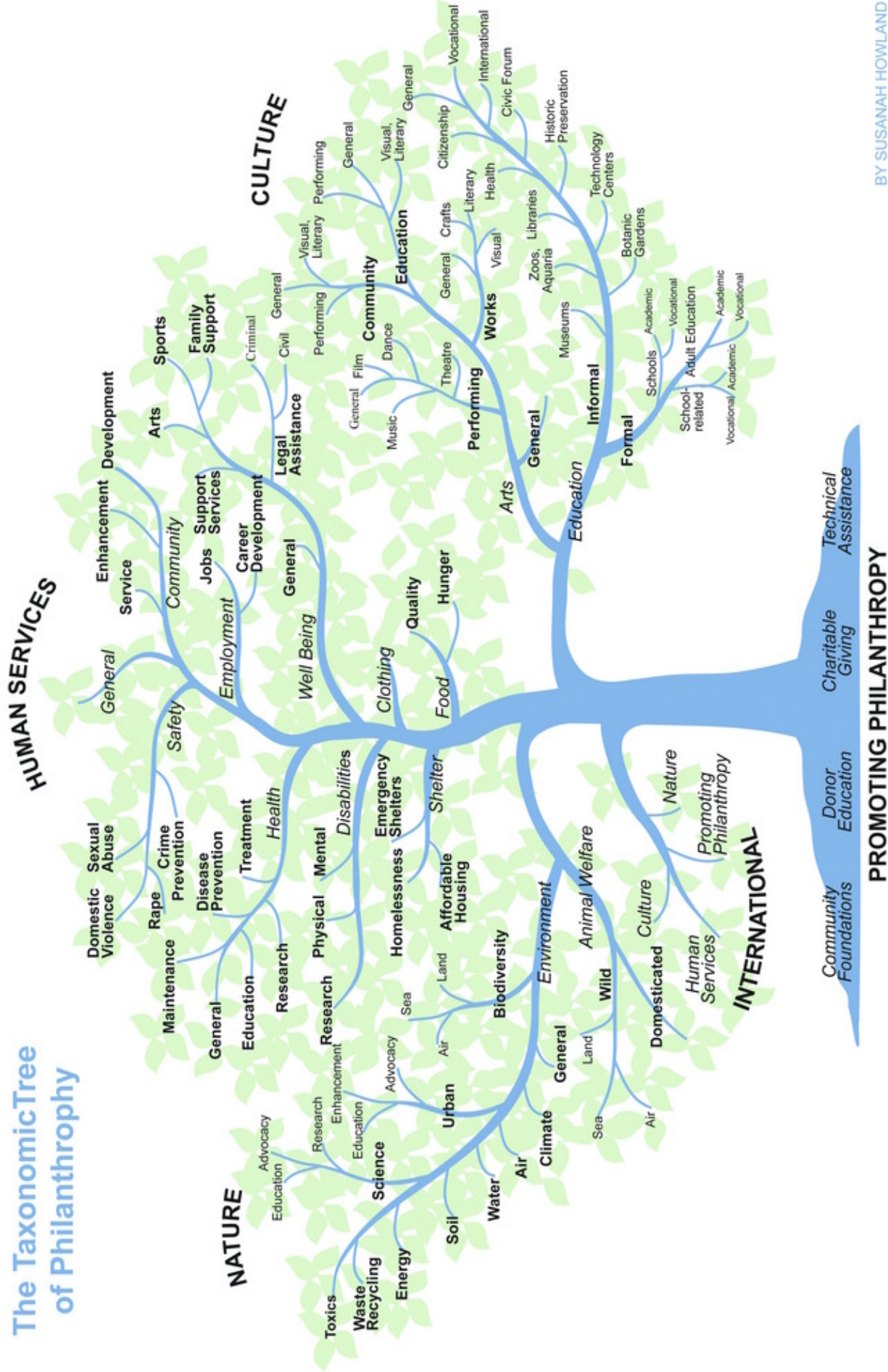
- 1.
- 2.
- 3.

Is there a link between my top three giving values and my top three issues/interest areas?

Example – My top giving values are joy, justice and innovation, and I care about funding health, women and girls. I think that healthy women and girls are the entrepreneurs of tomorrow and that they often are victims of injustice worldwide, so we should fund healthcare for women and entrepreneurship for women and education for girls to foster innovation.

What is the connection between your values and your issues? (fill in some thoughts on this below)

The Taxonomic Tree of Philanthropy



Giving Questions (adapted from Minnesota Giving Guide and Bolder Giving)

How much? When? With whom? How will I feel about it? There are many general questions you will need to answer as you make giving decisions and these considerations will impact planning.

- What is my giving style? The majority of my giving is ...

<i>Proactive</i>	<i>or</i>	<i>Reactive</i>
<i>Is unrestricted</i>	<i>or</i>	<i>Seeks a specific impact</i>
<i>Well thought out in advance</i>	<i>or</i>	<i>Result of an emotional response</i>
<i>Result of being asked</i>	<i>or</i>	<i>Result of personal research</i>
<i>Receives public recognition</i>	<i>or</i>	<i>Is anonymous</i>
- What is your vision for change? What do you wish to accomplish with your giving?
- If you are part of a couple, how do you work together, or not, on your giving?
- How much money do you want to commit to your philanthropy during your lifetime? After your death?
- Do you want to involve others in your giving plan, either inside or outside your family? If so, who? Who would be your team of advisors? Legal, philanthropic, financial?
- Are there time-sensitive tax considerations influencing your giving decision?
- Would you like your charitable giving to be part of your retirement or estate planning? If so, in what ways?
- What is your favorite, most satisfying gift to charity?
- What was your worst giving experience?
- What is your best volunteer experience?
- What is your worst volunteer experience?

My Philanthropic Activity and Resources

Before our first philanthropic planning meeting, just be ready to review the answers to the following questions. This is a lot of information, but it is important to have a clear, full understanding of the resources (both time and money) you are currently are deploying and those you plan to deploy towards your charitable ambitions so we can reflect that in your plan.

MONEY

1. How much did you give to charity according to your two most recent tax return?
2. What percentage of your AGI is this amount?
3. List all causes to which you donated in the past two years on a separate sheet. (If you use a Donor Advised Fund with the CFWM, we will provide this data for you. If you give outside your Donor Advised Fund, be prepared to talk about that in the planning meeting.)
4. List any pledges you currently are fulfilling.
5. List any new organizations to which you are considering a donation in the near future?
6. Do you have a legacy gift or charitable provision in your will or estate plans? What is it?
7. What charitable funds or foundations do you have?
8. What are major gifts you have made in the past? Please describe.
9. What resources do you use to make giving decisions?

TIME

1. Can you estimate how much volunteer time do you give each year to nonprofits?
2. List board involvement (current and/or past).
3. Do you plan to change your volunteer involvement? Is it OK as is?