

# Creating A Giving Plan

The act of generosity and giving is a powerful way to participate in changing the world. Your money, time, attention, energy, skills and possessions can all contribute to saving lives and make an impact or help to effect positive change.

Generosity is also an important expression of your values and an opportunity to put your values into action. Being intentional about where you give and how much you give away each year will help you maximize an opportunity to create change in the world in a way that aligns with your values.

It's important to ask yourself, How can I individually, and as a society, filter more of my resources (time, energy, money etc) to bettering the world?

Many of us can afford to give far more than we are giving, or can curb our spending on things we don't need in order to give more.

While many of us give based on reaction or a sense of duty or obligation, a better place to give from is in an intentional and thoughtful way that is in alignment with the causes that we are truly passionate about and value.

There are so many people, organisations, causes and communities that are deserving of our support. Whilst we can't help everyone, we can certainly make a real difference to some.

When we create a giving plan, we make our generosity structured and have a process to give in a more meaningful, purposeful and impactful way.

To begin you need to know what you can give, why you're giving and how you're going to give and then strategically match your resources with your values.

This worksheet will help you design an intentional giving plan.

## STEP 1: WORK OUT WHAT YOU CAN AFFORD AND WOULD LIKE TO GIVE

### Giving Money

1. How much money (and what percentage of your income) did you give away last year?
2. Honestly ask yourself: Can I afford to give more than I am currently giving?  
If so, what holds you back from giving more?  
How can you overcome this obstacle?
3. What percentage of your income will you donate this year?  
Use the following chart as a guide.  
Find your income level and then look across until you see the percentage of your income that makes sense to you

	2%	3%	5%	10%	15%	20%
\$30,000	\$600	\$900	\$1,500	\$2,000	\$4,500	\$6,000
\$40,000	\$800	\$1,200	\$2,000	\$4,000	\$6,000	\$8,000
\$50,000	\$1,000	\$1,500	\$2,500	\$5,000	\$7,500	\$10,000
\$60,000	\$1,200	\$1,800	\$3,000	\$6,000	\$9,000	\$12,000
\$75,000	\$1,500	\$2,225	\$3,750	\$7,500	\$11,250	\$15,000
\$100,000	\$2,000	\$3,000	\$5,000	\$10,000	\$15,000	\$20,000
\$250,000	\$5,000	\$7,500	\$12,500	\$25,000	\$37,000	\$50,000

\* The amounts are listed in pre-tax dollars but you can choose to calculate post-tax figures.

4. Fill in the blank:

*This year, I commit to giving away \$\_\_\_\_\_ to the people and causes that I value and support.*

### Giving Time and skills

1. How much of your time did you give away last year?
2. Honestly ask yourself: Can I afford to volunteer or give more of my time than I am currently giving?  
If so, what holds you back from giving more?  
How can you overcome this obstacle?
3. What percentage of your time will you volunteer this year?
4. Fill in the blank.

*This year, I commit to donating \_\_\_\_\_ of my time per week/fortnight/ month/quarter/year to the people and causes that I value and support.*

# Giving Possessions

1. Did you give away or donate clothing or unwanted possessions last year?
2. Honestly ask yourself: Do I have unwanted items that I could give away?  
If so, what holds you back from giving more?  
How can you overcome this obstacle?
3. How often would you like to donate items to charity this year?
4. Complete this sentence

*This year, I commit to donating my clothing or possessions on a monthly/quarterly/yearly basis to the people and causes that I value and support.*

## STEP 2: SET YOUR PRIORITIES

Start by considering the causes that are most important to you. The following questions may help you reflect: What about our world makes you angry? What inspires you? What keeps you up at night? What are the most important things that you think need to change in order to improve our society and our world? If you could wave a magic wand and make a difference in the world - what would you change? How would the world be different?

To help you we've provide a list of just some of the deserving causes and issues, you may come up with others that hold importance for you:

- Ageism
- AIDS
- Animal Rights / Protection
- Aboriginal Community Development and Support
- Anti-Racism
- Arts & Culture
- Boys + Young Men
- Catholic Charities
- Civil Rights
- Children
- Environmental Care
- Gender Pay Gap
- Girls + Young Women
- Healthcare & Medical
- Homelessness / Housing
- Human Rights
- Immigration
- LGBT Rights
- Literacy
- Legal Aid

- Disability Support
- Disaster Relief
- Domestic Violence
- Drug & Alcohol Support
- Economic Justice
- Economic Self-Sustainability
- Education
- Elder Care / Seniors
- Employment / Training / Jobs
- Prison Reform
- Public Policy / Advocacy
- Peace / Conflict Resolution
- Parks & Land Preservation
- Poverty
- Refugee Rights / Settlement
- Women's Rights
- Youth Development
- Other:

**STEP 3: WORK OUT THE REGIONS YOU'D LIKE TO SUPPORT**

We can choose to support certain regions or communities. Factors such as relationship, geography, religion and perceived level of need impact our decisions on who to help. For example, you may prioritize supporting members of your own community and also supporting those in greatest need in a country far away where hunger and poverty are big issues.

Take a moment to consider not only the causes you want to support, but also which communities you prioritize.

<i>Local / Community</i>	<i>National</i>	<i>International</i>
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**STEP 3: GET CLEAR ON THE ISSUES & LOCATIONS**

Using your answers to the above questions, list the 3 to 5 issues and communities you will support this year.

- 1.
- 2.
- 3
- 4.

#### STEP 4: RESEARCH / FIND ORGANIZATIONS TO SUPPORT

Now that you know what issues and locations or regions you'd like to support it's time to decide where to give your money. First though, it's important to articulate your vision for what you hope your money will help accomplish and the strategies you believe will help to achieve this vision.

For each issue / community you listed in the question above, what do you hope your money will help to accomplish? Can you identify people or organizations that you can support that share your vision and strategy for change? If you don't know how to find these organizations, use social media, reach out to friends, family, teachers and others to ask for suggestions

Be sure to get clear on how you would like to effect change. For example, there are a number of organizations addressing aspects of poverty. Which type will you choose to support? I.e. those charities that cook meals for people without food, or empower homeless people to get jobs or provide education and support programs or combat poverty through advocacy and policy setting.

<i>Cause/Community Person or Organisation that Supports my Vision for Change and why</i>	

#### STEP 5: DIVIDE IT UP

Use the chart below to divide your money across the communities, causes and organizations you listed.

Consider whether you want to divide your money so that many organizations receive a small amount, or if you would rather give larger amounts to a smaller number of organizations.

And remember to leave an amount for spontaneous giving opportunities that may crop up.

<i>Cause/Community</i>	<i>Element of Giving</i> <i>(money/time/donation etc)</i>	<i>Amount to donate</i>

### **STEP 6: START GIVING**

Congratulations on creating a thoughtful and intentional giving plan.

You might like to discuss your giving plan with family and friends and ask them about their giving priorities.