

What, Where, When, and How: A Mini Guide to Making A Giving Plan

What is a giving plan?

Giving plans and budgets are both guides for how and where you allocate financial resources. They should be a reflection of your values. A giving plan is a time bound map of how much and where you plan to move funds. Creating a giving plan is a way to check in with your heart, mind, and finances, then make a concrete path forward. Making a giving plan allows you to act with more intentionality and to notice if your current use of resources is in -or out- of alignment with your values. Giving plans can take many shapes - yours might be very detailed with lots of explanation, or a spreadsheet with very few words. Do what works for you. **You can make a copy of this doc to write directly onto it or start a separate doc/journal page!**

Where to start?

If you aren't already clear on your finances, that can be a helpful place to start. You can use these questions as a guide...

Section 1: Assets

1. How much money do I have in my checking account(s)? _____
2. How much money do I have in my savings account(s)? _____
3. How much money do I have invested, if any? _____
4. Add the first three lines: How much money do I have DIRECT access to? (This means money that you can use/move right now) _____
5. How much money, if any, do I have INDIRECT, limited, or restricted access to? (This might be money you have to go through family to use/move, for example)

6. Do I have access to any OTHER major assets, such as property? If so, what is their approximate total worth? _____

Section 2: \$ Flow

7. How much money did I make through work in the last year or do I expect to make this year? _____

8. If I have stocks, how much do I make off of them each year? To estimate this, you can multiply your assets that are held in the stock market by .07 = _____
9. How much money, if any, did I receive in gifts from my family or others last year?

10. How much money or other assets, if any, will I likely inherit, and, if I know, by when?

11. How much money do I spend each month/year? _____
12. How much money do I save each year? _____
13. How much money did I give/redistribute last year? _____

Section 3: Math time

14. What percentage of my earnings am I giving? _____
15. What percentage of my total DIRECT assets (\$ you have direct access to) am I currently giving? $(\text{[amt you gave last year]} / \text{[DIRECT access assets]} \times 100)$

16. What percentage of my total assets am I currently giving? $(\text{[amt you gave last year]} / \text{[DIRECT + INDIRECT + OTHER assets]} \times 100)$ _____

Reflections:

How does it feel to write out these numbers? Are you proud of your current giving? If not, at what percentage would you feel proud? What dollar amount does that percentage translate to?

When setting up the giving plan, use these prompts:

I am making a plan for _____ amount of time.

I am planning to move _____ amount of money in that time.

I am making this plan because I care about ...

This is one way I'm investing in ...

I want to focus this round of giving on organizations working on these issues...

The organization(s)/groups I plan to give to are:

If I need to help researching where to give I can reach out to _____.

If I need support following through on my plan I can reach out to _____.

In addition to funding I would like to contribute _____.

How to do it:

~Set aside dedicated, focused time to work on making a giving plan. If you get stuck, try just getting started: go online and make a donation somewhere. Nowhere is perfect and there's no one right way. Start moving money and learn from the doing.

~If you are giving larger amounts (generally speaking, over 10k but depending on the size of a group or organization, could be less) reach out beforehand to let them know how much you'll be sending, ask when the best time of year is to receive it and the best way to make the donation.

~You don't have to do it alone. Reach out to others in RG to make giving plans together. You can also ask people who don't come from wealth to support making the giving plan, and offer to compensate them for their time.

Templates (make a copy if helpful):

[Spreadsheet with tabs for calculated income, giving and tracking](#)

[Template for dividing into buckets](#)

[Template for giving from different sources](#)

[Giving plan tracker template](#)

[Template for monthly giving](#)

Giving Plan Examples:

Redistributing under 50K:

[Jansyn](#)

Living and giving off income:

[Jason](#)

Monthly Giving:

[Pierce](#)

Redistributing over 50K, High Net Wealth:

[Marissa](#)

[Katrina](#)

[Rachel](#)

Additional Resources:

[Social Justice Community Foundations, Rapid Response Funds, and Intermediaries](#)

[Best and Worst Donor Practices](#)

[Social Change Giving Plan Workbook](#) (2010)