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A Workbook For Your Charitable Giving

Giving Guide

THE COMMUNITY FOUNDATION MARTIN ST. LUCIE
The Giving Guide

will lead you through exercises that help you:

- Consider Your Charitable Motivations
- Reviewing Your Past Giving
- Record Your Values
- Identifying Your Interest Areas
- Define Your Community
- Set Your Giving Guidelines
- Establish Your Specifics
- Document Your Absolutes
- Formulate Your Giving Plans
Giving happens in many forms. You can donate your time and talents through volunteering, or you can use your financial resources to support causes you care about. Look back at your past giving to determine if your giving aligns with your interests or if you want to change course.

What organizations do you support and how do you support them?

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

What was your most meaningful or rewarding charitable investment or volunteer experience?

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

What was your most disappointing charitable moment?

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
CONSIDER YOUR CHARITABLE MOTIVATIONS

Take a moment to think about the following questions. Add any thoughts that might direct your charitable investments.

How would you improve the world?

What makes you happy?

What makes you sad?

Do you want to help today, focusing on immediate needs?

Do you want to address root causes and seek long-term solutions?

What do you believe is the best use of your charitable dollars?

What results do you want your charitable investments to achieve?
Record YOUR VALUES

What do you value most?
Start by circling values that resonate with your core principles and crossing out those that have little influence on your life.

Acceptance | Democracy
Access | Dignity
Acknowledgement | Diplomacy
Activity | Discipline
Beauty | Diversity
Change | Education
Collaboration | Empathy
Commitment | Empowerment
Communication | Energy
Community | Entrepreneurship
Compassion | Equity
Competition | Excellence
Conservation | Expertise
Courage | Fairness
Creativity | Faith

Family | Freedom
Generosity | Happiness
Harmony | Healing
Honesty | Humility
Inclusion | Independence
Innovation | Integrity
Involvement | Joy
Justice | Knowledge
Leadership | Love
Loyalty | Merit
Movement | Opportunity
Passion | Patriotism
Peace | Personal Growth
Preservation | Pride
Privacy | Respect
Responsibility | Security
Self-Expression | Self-Reliance
Service | Simplicity
Stability | Stewardship
Sustainability | Tolerance
Transformation | Truth
Versatility | Wisdom

Of the values you circled, which three hold the greatest impact or meaning to you? Feel free to add values that were not listed on the previous page.

________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
Identify Your INTEREST AREAS

Arts & Culture
  Literary
  Performance
  Visual

Animal-Related
  Animal Protection & Welfare
  Wildlife Protection
  Zoos & Aquariums

Civil Rights & Advocacy

Community Improvement

Crime & Legal-Related

Diseases, Disorders & Medicine
  Medical Research

Disaster Preparedness & Relief

Education
  Preschool
  Elementary & Secondary
  Higher Education

Employment
  Job Training & Placement
  Vocational Counseling

Environment
  Botanical
  Natural Resources & Conservation
  Recycling
  Water

Food, Agriculture & Nutrition
  Agriculture Programs
  Food Banks & Pantries
  Meal Delivery

Health
  Health Care Delivery
  Mental Health & Crisis Intervention
  Substance Abuse

Housing & Shelter
  Home Improvement & Repairs
  Homeless Shelters
  Senior Housing
  Subsidized Housing

Human Services
  Aging
  Children, Youth & Family Services
  Domestic Violence

International Affairs & National Security

Philanthropy & Volunteerism

Recreation & Sports

Religion-Related

Science & Technology
  Astronomy
  Biological & Life Sciences
  Chemistry
  Computer Science
  Engineering & Technology
  Marine Science & Oceanography
  Physical & Earth Sciences

Youth Development
  Youth Centers
  Service Clubs

Find the interest areas that matter most to you. Start by circling areas you like and crossing out areas that do not interest you. Then, try to narrow your focus to three areas.
Consider the community or communities you want to support. This could mean a geographic area or a population, for example, individuals with disabilities, religious groups, the elderly, or causes related to animals. Are there specific cultures or regions you care about? Circle or list specific countries, populations or community groups.
DEFINE YOUR Giving Guidelines

You may consider dividing your giving, allocating percentages for each area. Or, you may prefer to set guidelines for others who may participate in your giving.

FAMILY EXAMPLE

- 50% allocated by parents
- 25% allocated by child 1
- 25% allocated by child 2

CORPORATE EXAMPLE

- 75% allocated by executive team
- 25% reserved for employee matching gifts
COMMUNITY
Set aside money for ongoing charitable obligations to religious institutions, alma maters and other organizations you wish to regularly support.

PASSIONS AND PRIORITIES
Focus your giving on one or two organizations for maximum impact.

IMPULSE
Reserve some funds so you can say yes to friends who ask for your support, or answer a particularly moving request.

Use this graph to illustrate your own giving guidelines.

*The “50/30/20” Rule for Fullled Giving: Jason Franklin, Ph.D.*
You may want to identify specific causes or organizations you feel strongly about supporting.

**EXAMPLES**

We believe in the importance of public education, at both K through 12 and higher education levels. We support the School District Education Foundation and the State University.

We are interested in visual and performing arts. We wish to support the Museum and the Orchestra.
You can choose to outline more stringent rules for your giving.

**EXAMPLES**

We will only support programs benefitting our metro area.

Under no circumstances will we support organizations that:
After looking back at your previous responses, you may wish to formalize a giving plan or mission statement to clarify your goals and priorities. Or, you can use this section to simply record your thoughts on giving.

SOME QUESTIONS TO PONDER:

Did anything surprise you?

Do you plan to make any changes after completing this Giving Guide?

Is there anything you would like to share with future generations?

Did a mission statement emerge?

EXAMPLES

MISSION STATEMENT

We seek to improve literacy levels in our community. We do this by supporting adult and child literacy programs through donations and volunteering to tutor youth and adults.
Think of this Giving Guide as a living document. You can come back periodically and make updates as you evolve in your giving, and it can serve as a reminder or motivation as you make your charitable decisions.

If you want assistance carrying out your giving plans, we can help organize and maximize your charitable gifts through a charitable giving account, also known as a donor-advised fund. Charitable giving accounts allow you to maximize your giving, simplify your donations and give to the causes you love.
Leave a personal legacy that lasts forever
Since 1988

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Contact us to learn more.

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