

Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
 www.inspiredphilanthropy.com

Worksheet 10.1

Inspired Philanthropist's Checklist

Action	Applies to Me	I Aspire to
Know my values and what or who inspires my giving		
Create a giving plan and budget and give throughout the year		
Have a vision of the effect I want to have		
Do my homework and meet leaders and groups		
Coordinate my financial plan, my giving plan, and my estate plan for consideration of my legacy goals		
Align my giving, investing, and volunteering with my values		
Evaluate agencies and leaders I intend to invest in		
Increase my giving annually as inflation adds to the cost of nonprofits' work		
Look for models and solutions beyond and within my local community		
Stay committed as a donor for more than three years		
Never leave home without my address book		
Mentor other donors		
Work for lasting change by seeking the root causes of poverty and other social ills		
Seek transformative, system-shifting solutions		
Be an early donor to a funding campaign and give again at the end to help the campaign meet its goals		

Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
 www.inspiredphilanthropy.com

Worksheet 10.1

Inspired Philanthropist's Checklist, Cont'd

Action	Applies to Me	I Aspire to
Communicate well; respond to requests		
Be respectful of staff members' and volunteers' time		
Be sensitive about the inherent power differential I have as donor		
Give before I am asked		
Have conscious transitions or closures with organizations		
Open doors and encourage new partnerships		
Bring other funders to the table		
Offer time and expertise as well as money		
Offer leadership on committees and boards		
Ask for money on behalf of organizations and leaders I support		
Ask what is needed from leaders and practitioners who may be more involved than I am		