

Worksheet 1: What Resources for Social Impact?

What mix of resources do you want to dedicate for social impact? How will you use those resources to achieve your philanthropic purpose? Use this worksheet to help you—and/or others you'd like to involve—brainstorm the resources you're using currently and what you'd like to explore in the future.

Remember your “5 Ts” of resources to achieve social impact:



TIME

Hours available and frequency of your availability for volunteering and, if applicable, for administering a social impact vehicle



TALENT

Skills, knowledge, professional services, and creative energies



TIES

Relationships with other people, businesses, and organizations



TESTIMONY

Voice and reputation to educate and inspire others and advocate for a cause



TREASURE

Money, goods, stock and bonds, and other valuable assets

You might find that the uses of your resources are quite different across the four pathways for impact below. Effective philanthropists and funders will strive to create more focus and alignment in the uses of their resources over time.

1. Charitable Impact

(e.g., fundraising for a preservation organization; providing pro-bono graphic design to a youth center; donating retirement assets to a congregation; establishing a new donor-advised fund for your grandchildren)

Now: I'm currently using some or all my 5 Ts in these ways:

Near-term: In next two years, I'd like to change the amounts or uses of my 5 Ts in these ways:

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Long-term: In the future, I'd like to explore using my 5 Ts in these ways:

4. Direct and Peer-to-Peer Impact

(e.g., directly taking care of others, helping a neighbor fix a car; donating to a person in need through a crowdfunding campaign; participating in a mutual aid network, a giving circle, or a movement for change)

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