



colorado

engaging tomorrow's donors today

What does a "philanthropist" look like?



Building Your:
Personal Philanthropy Plan

www.mycoloradoproject.org

Our Mission: We connect Coloradans to the charities and causes they care about most.

Introduction

ABOUT MY COLORADO PROJECT

This guide is targeted for young givers (age 22-35) taking their first steps as philanthropists. We believe there is a growing community of young “everyday philanthropists” who want to improve the world and understand the importance and impact of making a difference one decision at a time.

We believe many donors are flying below the radar of traditional philanthropy and their contributions are not being tracked. While young people are giving, many are doing so in smaller amounts to a larger number of charities. Creating a Personal Philanthropy Plan will help you focus your giving and capture the total impact of your community investment.

We encourage young donors to use this guide in conjunction with our new online giving community, **My Colorado Project**. Rather than following the traditional fundraising method of only pursuing gifts from those with means, **My Colorado Project** offers young people the means to give. **My Colorado™** features financially accessible incremental giving plans (\$10–\$100 monthly deductions from your checking account) and an easy way to engage others in your cause by creating a giving group.

Visit www.mycoloradoproject.org to get involved in a local social media network focused on philanthropy and justice.

ABOUT COMMUNITY SHARES OF COLORADO

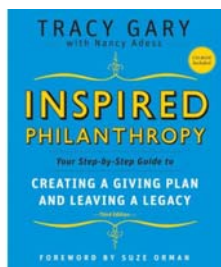
Community Shares was formed in 1986 as the “Alternative Fund” to provide financial resources to diverse organizations not traditionally included in highly promoted workplace fund drives. Using an incremental giving model through paycheck contributions and monthly electronic funds transfer, Community Shares democratizes philanthropy and offers accessible giving options to all who wish to make an impact.

Community Shares includes over 100 member nonprofit organizations dedicated to improving health and well being, conserving Colorado’s environment, working for a just society, promoting animal welfare, and fostering cultural understanding and the arts. Each organization has a unique mission, innovative service delivery, and a proven history of turning investment into achievement.

Visit www.cshares.org to learn more about Community Shares and incremental giving plans.

INSPIRED PHILANTHROPY™

The primary resource for this guide is the book, **Inspired Philanthropy: Your Step-By-Step Guide to Creating a Giving Plan**, written by Tracy Gary. The website, www.inspiredlegacies.org, includes more information about “inspired philanthropy,” planned giving, and helpful worksheets if you would like to create a more extensive giving plan.



COMMUNITY SHARES

1536 Wynkoop Street, Suite 202, Denver, CO 80202
No gifts or services over each donation—your donation is!

Community Shares

I authorize my employer to deduct from my pay:
\$ 20 per paycheck.

I am paid:
 weekly (x 52) every 2 weeks (x 26)
 twice a month (x 24) monthly (x 12)
Total annual pledge \$ 480
(Xpaycheck x # of paychecks/yr.)

I am enclosing my gift: \$ _____

Please make checks payable to Community Shares

check cash
 \$ _____ one-time credit card donation
 Visa MC Disc AmEx
Card # _____
Expiration date (MM/YY) _____

I prefer to designate to the following agencies:
5143-COLORADO PUBLIC RADIO; 51
or I prefer to designate to the Shares Fund (for

There are many ways of going forward, but only one way of standing still.

Why Plan?

What is a plan? The steps that lead to an outcome.

Why plan? To refine your purpose and establish a path to success.

Why plan your community investment? It feels good to give; it feels better to be a changemaker.

Whether it's spending a few hours volunteering, financially supporting a charity, or standing up for something you believe in, your every gift makes your community a better place. Most likely, you are already making a difference.

We are bombarded by opportunities to participate in transactional philanthropy due to cause related marketing opportunities and "one click activism" on the internet. However, community investment can be transformational when it is a living reflection of who you are.

Some people may be able to connect the dots between their giving, volunteering, and activism and create a vague sketch of common themes and goals. Others are still working on articulating their passions, interests, and vision for a better world.

A plan will encourage you to prioritize values and issues, choose relevant action steps, and give you a sense of purpose and accomplishment. Planning in itself does not produce results. Use the plan to help break your large goals down into targeted projects and achievable aspirations.

BY COMPLETING THIS GUIDE YOU WILL:

- Distinguish what you think is important and learn to speak to your values.
- Identify how your values are manifested in everyday life and the issues you care about most.
- Live with a purpose you define in a personal mission statement.
- Assess your skills and unique talents so you can seek out high impact volunteering opportunities.
- Give intentionally by following a personal philanthropy plan.

No matter how long the journey to reach your goal, a plan allows you to stake road markers to track how far you've come and guide your direction.

"I plan everything! Looking back, why wouldn't I plan my community giving? I work in the nonprofit sector, regularly give to the charities and causes I care about, and support my friends' organizations when asked. I have some general guidelines but there are things in the world I want to change and I need to focus my giving."

"I am not a natural planner. I spent several years following Buddhism as a non-spiritual life practice. I do believe I can make a difference with my actions. While I'm alive and making an impact, a plan will help me live with purpose."

BIG CITY MOUNTAINEERS



First learn the meaning of
what you say, and then
speak.

Values

How you give is not just a reflection of your values, it is the living expression of who you are. Before planning your giving, take some time to consider what matters to you most. Start thinking about what ideals you believe have intrinsic meaning and worth. Choose your top 8 values and then narrow down to 2-4 values fundamental to your world outlook. Feel free to write in a value not listed.

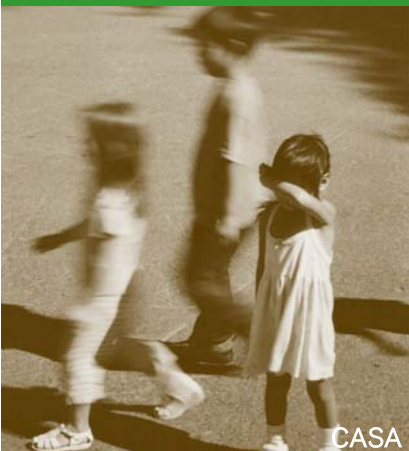
Acceptance	Grace	Openness
Awareness	Growth	Opportunity
Balance	Harmony	Patience
Beauty	Happiness	Peace
Bravery	Healing	Persistence
Challenge	Honesty	Practicality
Commitment	Honored Obligations	Preservation
Community	Humility	Reason
Compassion	Inclusivity	Reflection
Connection	Imagination	Respect
Conservation	Independence	Resourcefulness
Cooperation	Industrious	Responsibility
Courage	Innovation	Security
Creativity	Inspiration	Self-Reliance
Democracy	Interdependence	Service
Dependability	Integrity	Simplicity
Dignity	Inventiveness	Sincerity
Diversity	Investing	Solidarity
Efficiency	Joy	Success
Equality	Justice	Support
Empathy	Kindness	Spirituality
Enthusiasm	Knowledge	Stability
Excellence	Leadership	Sustainability
Fairness	Liberation	Teamwork
Faith	Logic	Transformation
Family	Love	Trust
Freedom	Loyalty	Truth
Frugality	Mindfulness	Unity
Generosity	Modesty	Vision
Giving	Neighborly	Wisdom

MY TOP VALUES

_____	_____
_____	_____
_____	_____
_____	_____

MY MOST IMPORTANT VALUES

_____	_____
_____	_____



On issues that seem important to you, stand up and be counted at any cost.

Issues

This page includes issue areas and populations that may speak to your passions. Consider specific issues that inspire you to get involved and make a difference.

What issues do we need to address to make the world a better place?

Abuse	Electoral Reform	Personal Responsibility
Access to Service	Faith-Based Service	Philanthropy
Ageism	Family Welfare	Pollution
Animal Welfare	GLBT Issues	Poverty
Art Institutions	Gender Identity	Prison Reform
Arts	Genocide	Public Policy
Biodiversity	Gun Control	Racial Justice
Child Welfare	Fitness	Recreation
Child Care	Health	Refugee Services
Civic Engagement	Healthcare	Religion
Civil Rights	Health Research	Renewable Energy
Classism	Historic Preservation	Reproductive Rights
Computer Literacy	Homelessness	Safety
Conflict Resolution	Housing	Science & Technology
Consumer Rights	Human Rights	Semitism
Corporate Responsibility	Hunger	Sex Workers
Crisis Shelters	Hygiene	Sexuality
Cultural Heritage	Immigration Rights	Slavery
Death and Dying	International Development	Social Justice
Demilitarization	Job Placement	Spiritual Development
Dental Care	Land Preservation	Sports & Recreation
Disability Rights	Legal Aid	Substance Abuse
Disaster Relief	Literacy	Sustainable Development
Discrimination	Media	Transportation
Domestic Violence	Medical Research	Urban Planning
Ecology Protection	Mental Health	Veteran Issues
Economic Justice	Mentoring	Volunteerism
Education	Music	Voter Rights
Education Reform	Native Peoples' Issues	Wage Equality
Employment Training	Nutrition	Water Quality
Environmental Conservation	Open Space	Women's Issues
Environmental Justice	Peace	Youth Development

MY TOP ISSUES

_____	_____
_____	_____
_____	_____
_____	_____

MY MOST IMPORTANT ISSUES

_____	_____
_____	_____



We learn and grow and are transformed not so much by what we do but by why and how we do it.

Mission

MY MOST IMPORTANT VALUES

MY MOST IMPORTANT ISSUES

Try to identify the relationship between your top values and issues.

Example: My top values are honesty, courage, and interdependence and my most important issues are civic engagement, philanthropy and equal rights. The relationship I see is that I believe we have a shared responsibility to stand up for what we believe in and every person is important and unique.

DESCRIBE THE RELATIONSHIP BETWEEN YOUR VALUES AND ISSUES:

Nonprofit organizations use Mission Statements to guide their work. According to www.MissionStatements.com, "A mission statement defines in a paragraph or so any entity's reason for existence. Any entity that attempts to operate without a mission statement runs the risk of wandering through the world without having the ability to verify that it is on its intended course."

As an individual changemaker, creating a personal mission statement will give you a touchstone to compare how your giving is lining up with your intention and goals. A mission statement should be no more than a few sentences—the shorter and clearer the better! According to **Inspired Philanthropy**, it should include 1) a reference to your values, 2) what you think would address the issues you care about, and 3) what you are going to do to create change.

Example: I believe every person has the potential to improve the world and I will inspire philanthropy and influence others to recognize their changemaking power. I will develop an online social media site for sharing information and organizing giving groups.

YOUR PERSONAL MISSION STATEMENT:



THE GATHERING PLACE

When you let your own light shine,
you unconsciously give permission
to others to do the same.

My Skills

We all have skills but we might not recognize how our skills may be valuable to a nonprofit organization. In our recent survey, over 70% of young people said they wanted to make an in-kind donation of their skills to a nonprofit organization.

IDENTIFY YOUR UNIQUE TALENTS AND SKILLS. HOW CAN YOU HELP?

- _____ I like to take photos and can help a nonprofit build its digital library.
- _____ I have a valuable professional skill (bookkeeping, IT support, graphic design, writing) and could donate my time to a nonprofit.
- _____ I love animals and could walk shelter animals during my lunch break or on weekends.
- _____ I like to talk to people and could help a nonprofit by volunteering at an information booth at a festival or fair.
- _____ I can help an organization with search engine optimization.
- _____ I don't mind asking people to donate money to causes I believe in.
- _____ I'm willing to go door-to-door to encourage people to vote.
- _____ I like to roll up my sleeves and get work done—I can help a nonprofit on a building, landscaping, or cleaning project.
- _____ I can support community-owned art and media projects.
- _____ I use social media sites like My Space and Facebook and can ask my friends to get involved with causes.
- _____ I like to cook and can help a shelter prepare meals for its clients.
- _____ I enjoy planning events and hosting parties.
- _____ I can translate documents into other languages.
- _____ I enjoy talking with people and can be a supportive listener for people who are feeling lonely.
- _____ I have a large network of people and could connect a nonprofit to the "right" person for a project.
- _____ I can collect pledges and do a run, hike, or bike trip for charity.
- _____ I like kids and could be a positive mentor.
- _____ I have 10-key or typing skills and could complete data entry projects.
- _____ I can be careful with my shopping dollars and try to support businesses that share my values.

_____ Other: _____

_____ Other: _____

_____ Other: _____



THORNE ECOLOGICAL INSTITUTE

Our actions are our only possessions.

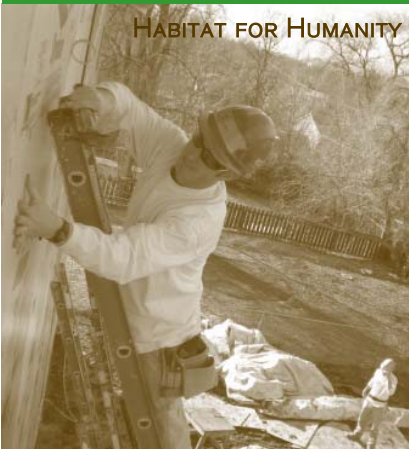
Volunteering

Volunteering with a nonprofit organization is a reciprocal relationship. Both parties should benefit and both parties are accountable to each other.

Metro Volunteers shared their list of volunteer rights and responsibilities.

THE VOLUNTEER'S RIGHTS AND RESPONSIBILITIES

It is your right:	It is your responsibility:
1. To be assigned a task that is worthwhile and challenging.	Not to take more responsibility than you can handle.
2. To receive the orientation, training, and supervision needed to do the job.	To meet time commitments or to provide notice so alternative arrangements can be made.
3. To feel your efforts have real purpose and contribute to the organization's mission.	To perform the task assigned to you to the best of your ability.
4. To receive useful feedback and evaluation on the volunteer work you perform.	To provide input on ways your tasks might be better performed.
5. To be treated with respect and as an equal partner within the organization.	To follow organizational policies and procedures.
6. To be trusted with confidential information needed to carry out your assignment.	To respect those confidences entrusted to you.
7. To be kept informed about relevant matters within the organization.	To be open-minded and respectful toward opinions shared with you.
8. To expect that your time will not be wasted due to poor planning or poor coordination by the organization.	To notify the organization in advance of absences or schedule changes that may affect them.
9. To ask any questions that will clarify a task or assignment.	To accept reasonable tasks without complaint.
10. To give an organization input or advice on how to better accommodate the needs of their future volunteers.	To communicate and work with others in the organization if the task calls for it.



VOLUNTEER OPPORTUNITY POSTINGS:

Metro Volunteers

www.metrovolunteers.org

Volunteer Connection of Boulder County

www.volunteerconnection.net

VolunteerMatch

www.volunteermatch.org

If you have much, give of your wealth; if you have little, give of your heart.

How Much?

Especially in your first years as a giver, you may not know how much of your financial resources you can share with others. Financial contributions are personal and many of us have an emotional reaction to discussing money.

Knowing your relative wealth may inspire you to set goals for your annual charitable giving. For people looking for more some guidelines around wealth and giving, here are a few facts on wealth from **Inspired Philanthropy**:

According to the 2000 Census, pretax household incomes distribute as follows:

- 29.3% of the population make less than \$25,000.
- 13.3% of the population make \$25,000-\$35,000.
- 16.4% of the population make \$35,000-\$50,000.
- 20.1% of the population make \$50,000-\$75,000.
- 11% of the population make \$75,000-\$100,000.
- 8.7% of the population make \$100,000 or more.
 - 4.6% of the population make more than \$119,540
 - 1% of the population make more than \$330,000 annually and have a net worth of \$2.5 million or more. (a.k.a, “the top 1%”)
- Worldwide, the average annual income per capita is \$800.

On average, Americans give away only 2% of their income to charity. Many religions encourage “tithing”, which literally means one-tenth, and call for people to give 10% of their income for the good of humanity.

There is no “best” way to decide how to choose the amount of your charitable contributions. Some feel it is best to build more wealth before giving so they can make larger gifts in the future. Some choose to give a set percentage of their income and allow their philanthropy to grow over time.

At Community Shares, we encourage each person to choose an amount that is personally significant.

GIVING AS A PERCENTAGE OF SALARY

Gross Salary	1%	3%	5%	10%
\$24,000	\$240	\$720	\$1,200	\$2,400
\$30,000	\$300	\$900	\$1,500	\$3,000
\$35,000	\$350	\$1,050	\$1,750	\$3,500
\$40,000	\$400	\$1,200	\$2,000	\$4,000
\$50,000	\$500	\$1,500	\$2,500	\$5,000
\$60,000	\$600	\$1,800	\$3,000	\$6,000
\$75,000	\$750	\$2,250	\$3,750	\$7,500



CHILDREN'S OUTREACH PROJECT

I get up every morning determined to both change the world and have one hell of a good time. Sometimes this makes planning my day difficult.

My Plan

MY MISSION STATEMENT:

MY SKILLS:

I WILL SUPPORT OR LEARN MORE ABOUT THESE COMMUNITY ORGANIZATIONS:

I AM GOING TO LEARN MORE ABOUT THE NONPROFIT ORGANIZATIONS BY:

- | | |
|--|--|
| <input type="checkbox"/> Visiting websites. | <input type="checkbox"/> Requesting site visits. |
| <input type="checkbox"/> Signing up for newsletters. | <input type="checkbox"/> Volunteering. |
| <input type="checkbox"/> Going to events. | <input type="checkbox"/> Doing phone interviews. |

MY VOLUNTEERING AND IN-KIND SERVICE GOALS FOR THE YEAR:

By _____ (date) , I will _____

By _____ (date) , I will _____

By _____ (date) , I will _____

COLORADO YOUTH PROGRAM



Rather than simply changing the world,
one should aspire to make a positive
change with each action they commit.

My Plan

MY FINANCIAL GIVING GOAL FOR THE YEAR IS:

- Financial gifts totaling \$_____.
- Financial gifts of _____% of my pre-tax income totaling \$_____.
- Financial gifts of _____% of my post-tax income totaling \$_____.
- I would like to get _____ people to join me in making a financial donation to a cause.
- My fundraising goal is \$_____.

I PLAN TO DISTRIBUTE MY PERSONAL GIVING AS FOLLOWS:

CORE GIVING RECIPIENTS	TOTAL BUDGET \$	TOTAL PER GROUP \$	TARGET DATE FOR GIFT	METHOD OF GIVING*
	%	\$		
	%	\$		
	%	\$		
	%	\$		
TOTAL CORE GIVING	100%	\$		

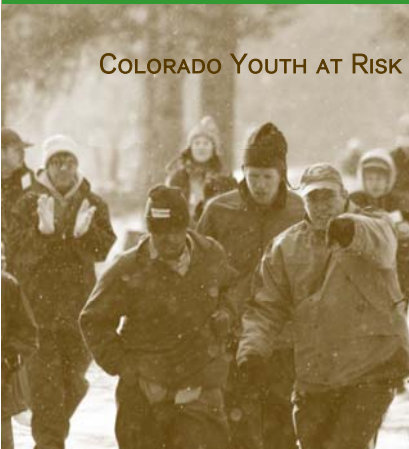
TRACKING NON-PLAN GIVING:

SPONTANEOUS GIVING RECIPIENTS	AMOUNT OF GIFT \$	WHO ASKED FOR GIFT?	METHOD OF GIVING	CONSIDER GIVING AGAIN?
	\$			Y N
	\$			Y N
	\$			Y N
	\$			Y N
	\$			Y N
	\$			Y N
TOTAL SPONTANEOUS GIVING	\$			

* Method of Giving indicates cash, check, charge, EFT, or paycheck contributions.

OTHER GOALS:

- I would like to get _____ people to complete a volunteer project with me.
- I would like to get _____ people to come to a fundraising event with me.
- I would like to volunteer on a political campaign.
- I would like to create a budget and closely track my spending to identify ways I can be a more responsible consumer.



To come to be you must have a vision of Being, a Dream, a Purpose, a Principle. You will become what your vision is.

Evaluation

PERSONAL PHILANTHROPY PLAN EVALUATION

CREATED A PERSONAL MISSION STATEMENT Y N

IDENTIFIED RECIPIENTS FOR MY COMMUNITY SUPPORT Y N

USED MY UNIQUE SKILLS ON A VOLUNTEER OR IN-KIND PROJECT Y N

CREATED A COMMUNITY GIVING BUDGET Y N

MET PERSONAL GIVING GOAL Y N

MET FUNDRAISING GOAL Y N

ORGANIZED OR PARTICIPATED IN A GROUP VOLUNTEER PROJECT Y N

HOW DID YOUR GIVING BUDGET, PLANNED AND SPONTANEOUS, REFLECT YOUR ACTUAL GIVING FOR THE YEAR?

HOW WILL THE MATCHES AND DIFFERENCES EFFECT YOUR NEXT GIVING BUDGET?

DESCRIBE HOW YOUR ACTIONS OVER THE COURSE OF THE YEAR REFLECTED YOUR COMMITMENT TO YOUR MOST IMPORTANT VALUES AND ISSUES:

IS THERE ANYTHING YOU STILL WANT TO ACCOMPLISH RELATED TO YOUR PLAN?

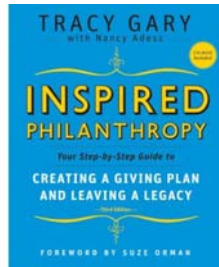


THORNE ECOLOGICAL INSTITUTE

A man travels the world in
search of what he needs and
then returns home to find it.

Resources

RESOURCES



A great “next step resource” is the book, **Inspired Philanthropy: Your Step-By-Step Guide to Creating a Giving Plan**, written by Tracy Gary. The website, www.inspiredlegacies.org, includes more information about “inspired philanthropy”, planned giving, and helpful worksheets if you would like to create a more extensive giving plan.

My Colorado Project

Visit our online community giving network to start your own giving fund.
www.mycoloradoproject.org

Community Shares of Colorado

Learn more about the state’s most innovative community giving fund.
www.cshares.org

Denver Young Nonprofit Professionals Network

Connect with young people in the nonprofit sector for cost-accessible professional development and a support network.
www.ynpndever.org

Metro Volunteers

Denver’s home for volunteer opportunities and board leadership.
www.metrovolunteers.org

Volunteer Connection of Boulder County

Provider of individual and corporate volunteer projects.
www.volunteerconnection.net

OUR OTHER GIVING AND INNOVATOR WEBSITES

www.changemakers.net

Open sourcing social solutions.

www.firstgiving.com

Complete a one-time giving drive for your favorite 501(c)(3).

www.kiva.org

Seminal innovator of micro financing projects funded by teams of individuals.

www.volunteermatch.org

Online site for searching for volunteer opportunities in your region. Search by distance or keyword.

www.mobileaccord.com

Offers text message fundraising to nonprofit organizations regardless of size.

LONGMONT HUMANE SOCIETY





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Published by Community Shares of Colorado
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www.mycoloradoproject.org

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