

Step 3: Create Your GIVING Plan



Turn your reflections into action and build upon a plan that fits your life.

You've defined your giving mission and explored local organizations that align with your values. Now it's time to turn your intentions into action. Whether you're planning to give a little, a lot, or simply become more informed and involved, this worksheet helps you take the next steps in a way that feels achievable and grounded in your personal goals.

Learn More About the Issues You Care About

[GivingMatters.com](https://givingmatters.com) is a great place to start, but you don't have to stop there. Here are ways to deepen your knowledge and build your confidence as a giver.

Choose what fits your style:

- ☐ Explore nonprofit profiles on [GivingMatters.com](https://givingmatters.com)
- ☐ Use the Impact Map to learn what's happening near you
- ☐ Read stories, blogs, or reports from organizations working in your interest area
- ☐ Follow a few nonprofits on social media or sign up for their emails
- ☐ Attend a public event, community conversation, or local fundraiser
- ☐ Talk to someone directly impacted by the issue you care about
- ☐ Join a donor learning group or giving circle
- ☐ Other: _____

Decide How You Want to Help

Philanthropy isn't just about money. Your time, skills, and relationships are valuable.

How might you support nonprofits in ways that are meaningful to you?

Consider:

- ☐ Share a nonprofit's story with your network
- ☐ Join a board or advisory committee
- ☐ Invite a friend to learn more about an issue together
- ☐ Offer professional skills (e.g., marketing, finance, design, legal help)
- ☐ Help fundraise or host an awareness event
- ☐ Talk with friends or coworkers about the causes you care about
- ☐ Other: _____

CONTINUE TO NEXT PAGE





Allocate Your Financial Resources

Your giving doesn't have to be large to be intentional. Set a goal that works for your life, and revisit it when your circumstances or priorities shift.

Ways to start:

- ☐ Set a monthly or annual giving amount
- ☐ Choose 1-3 nonprofits that align with your mission and plan to give regularly or set up recurring gifts
- ☐ Revisit your past giving and consider shifting to align with your goals
- ☐ Talk with your partner or family about shared giving priorities
- ☐ Check for workplace matching gifts or employer-sponsored giving programs
- ☐ Explore giving through your estate plan, retirement accounts, or a donor-advised fund.
- ☐ Other: _____

Commit to Your Plan

Now pick the actions that feel right for you, big or small.

This year, I will...

1. _____
2. _____
3. _____

In the next 3 months, I will...

1. _____
2. _____
3. _____

Tip: Add these to your calendar or planner now. Revisit your plan in a few months and celebrate your progress!

Want More Guidance?

- Talk to a staff member at CFMT at <mailto:givingback@cfmt.org>
- Explore donor resources on GivingMatters.com
- Follow GivingMatters.com on  