# **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

Choose what fits your style:

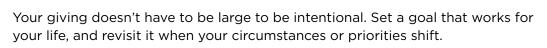
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<u>GivingMatters.com</u> is a great place to start, but you don't have to stop there. Here are ways to deepen your knowledge and build your confidence as a giver.

Explore nonprofit profiles on <u>GivingMatters.com</u>		
Use the Impact Map to learn what's happening near you		
$\hfill\Box$ Read stories, blogs, or reports from organizations working in your interest area		
$\square$ Follow a few nonprofits on social media or sign up for their emails		
Attend a public event, community conversation, or local fundraiser		
$\square$ 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		
☐ Jin 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:		



## Allocate Your Financial Resources





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 <u>donor-advised fund</u> .		
Other:		
Commit to Your Plan		
Now pick the actions that feel right for you, big or small.		
This year, I will	In the next 3 months, I will	
1	1	
2	2	

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

3. \_\_\_\_\_

#### Want More Guidance?

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



