



GET READY TO  
**BOOST YOUR  
GIVING IQ**



**FIDELITY** Charitable®  
Make more of a difference

# BOOST YOUR GIVING IQ

Recent research tells us that generosity is hardwired in our brains. But we aren't born knowing how to have the greatest impact with our giving. Fortunately, a few simple steps can help you make your charitable giving more satisfying, focused and effective. This booklet provides you with a 3-step guide, including worksheets that can help you create a personal giving plan.



## Create a mission statement.

When your giving has a clear purpose, driven by the issues most important to you, your philanthropy will feel more focused—and meaningful. Reflect on just a few short questions and discover your mission.



## Develop a giving action plan.

Once you've identified what is most important to you, it's time to decide how you can really make an impact on the causes you care about. Create a plan and map out the steps you will take to achieve your goals, in the short and long term.



## Research charities.

With more than 1.8 million nonprofits operating in the United States, how do you choose which organization to support? Use this series of questions to evaluate a nonprofit organization and ensure you're choosing the charities that best align with your mission.

# Discover your mission

Create a personal mission statement to guide your giving



**1** Reflect on what inspires you

**2** Determine where you will focus

**3** Discover your mission

A giving mission statement helps you focus your giving on what matters most to you. This worksheet walks you through the steps to create your giving mission statement, which will reflect your personal values and articulate your goals.

Want to create a joint or family mission statement? Complete the first two steps of the worksheet separately, and then discuss your answers together to develop a shared purpose in giving.

## 1. What inspires you to give?

Your values, experiences, and beliefs are what inform your giving. Before you create your statement, reflect on what inspires you to give.

What are some formative experiences in your life? How did they shape you?

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Who are the people who have been strong influences on you? What have they taught you?

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When you think about our world and society, what inspires or upsets you?

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What are some of your core values or principles?

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What motivates you to give?

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## 2. Where will you focus?

Your mission statement describes what you want to accomplish with your giving. Consider the following questions and how they will inform your mission.

**What issues do you want to affect? Why? How?**

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**What population do you want to focus on?**

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**What is your geographic scope?**

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**What is your vision or long-term goal for your giving?**

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## 3. Write your mission statement.

Drawing upon the values, interests, and motivations you described above, write a one-to-three sentence mission statement for your giving.

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### **Sample mission statements:**

To honor my mother's work as a Pre-K teacher, I will give to early childhood education programs in my state so all children arrive at kindergarten ready to learn.

I will help veterans successfully transition out of the military by funding programs that provide job support services.

# Create an action plan

## Plan your next steps to create impact with your giving

You've decided how you most want to make a difference with your giving. But how do you get started? This worksheet will help you create an achievable action plan to accomplish your giving goals, including identifying the immediate next steps to take.



### 1. Learn more

What will you need to know to make a difference? Check off all the action items you'd like to take on to better understand your target issue or area.

#### First steps:

- Develop a list of nonprofits doing work in your area of interest and research them online.
- Conduct online research about most effective approaches to solving the problems or serving the communities you care about.

#### Next steps:

- Call a nonprofit to learn more about what it does and what it needs.
- Connect with other donors who share your passion and ask them questions.
- Read information published by large foundations focused in your funding area
- Speak with experts on your issue or interest area.
- Attend events related to your issue or interest.
- Set up an online news search to stay current on your issue or interest area.
- Track ongoing conversations and key stakeholders on social media.
- Read information published by issue area affinity groups or associations.
- Talk to people closest to the problem or most impacted by your issue or interest area.
- Investigate whether a philanthropic advisor could assist with creating your plan.
- Join a donor network focused on this giving area.
- Other

## 2. Decide how you want to help

Your time, talents, skills, networks, and experiences can be valuable assets for your giving. Consider what you're willing or able to do in addition to providing any financial support.

### First steps:

- Create a list of the skills and expertise you bring to the table. Identify the skills you would—and wouldn't—like to use in your philanthropy.
- Commit to spending a specific amount of time each month on your philanthropy.
- Reach out to organizations to explore volunteer opportunities.

### Next steps:

- Invite others in your network to an event to learn more about an issue.
- Make an introduction between the nonprofit and a contact who could help them.
- Commit to serve on a board or committee, lead or participate in a volunteer project, or take on another regular volunteer role.
- Host a fundraiser or advocacy event.
- Approach a nonprofit about initiating a project.
- Attend a public meeting or event to advocate.
- Write a letter to the editor, a lawmaker, or other influencer to raise awareness.
- Notify a nonprofit that you are willing to be an advocate on its behalf.
- Talk with friends about how they connect with causes they care about.
- Other

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### 3. Allocate your financial resources

How will you fund your giving? Consider how you can best use your financial resources to achieve philanthropic impact.

#### First steps:

- Create a budget for giving on a monthly or annual basis.
- Create target short- and long-term donation amounts and frequency.
- Discuss giving goals with your family or partner.
- Evaluate whether the current charities you support align with your mission, and if necessary, reallocate funds to align with priorities.
- Discuss charitable giving with your advisor, and say you'd like to incorporate into your financial or legacy plan.

#### Next steps:

- Explore options for including charitable giving in a legacy plan.
- Investigate corporate matching-gift options at your workplace.
- Make a charity a beneficiary of your will or estate plan.
- Investigate whether a giving vehicle such as a charitable annuity or donor-advised fund could be right for you.
- Take steps to set up a charitable giving vehicle.
- Speak with someone who works in fundraising at one of your target nonprofits to determine what you can achieve at various levels of donation.
- Identify a "stretch gift" you'd like to make and put it in your budget.
- Explore options to create a prize or challenge grant, or create other leverage with your gifts.
- Pool your resources with others, such as family members or through a giving circle, to have a greater impact with your giving.
- Look into aligning your personal investment strategy with your philanthropic strategy.
- Other

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## 4. Commit to your action plan

You've identified the action steps you'd like to take to achieve your charitable mission. Now, choose the steps from the list above that you'd like to prioritize this year and write them below.

### **This year, I will...**

1. \_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

Next, choose one to three steps from the list above that you can commit to doing in the next three months and write them below.

### **Within the next three months, I will...**

1. \_\_\_\_\_

\_\_\_\_\_

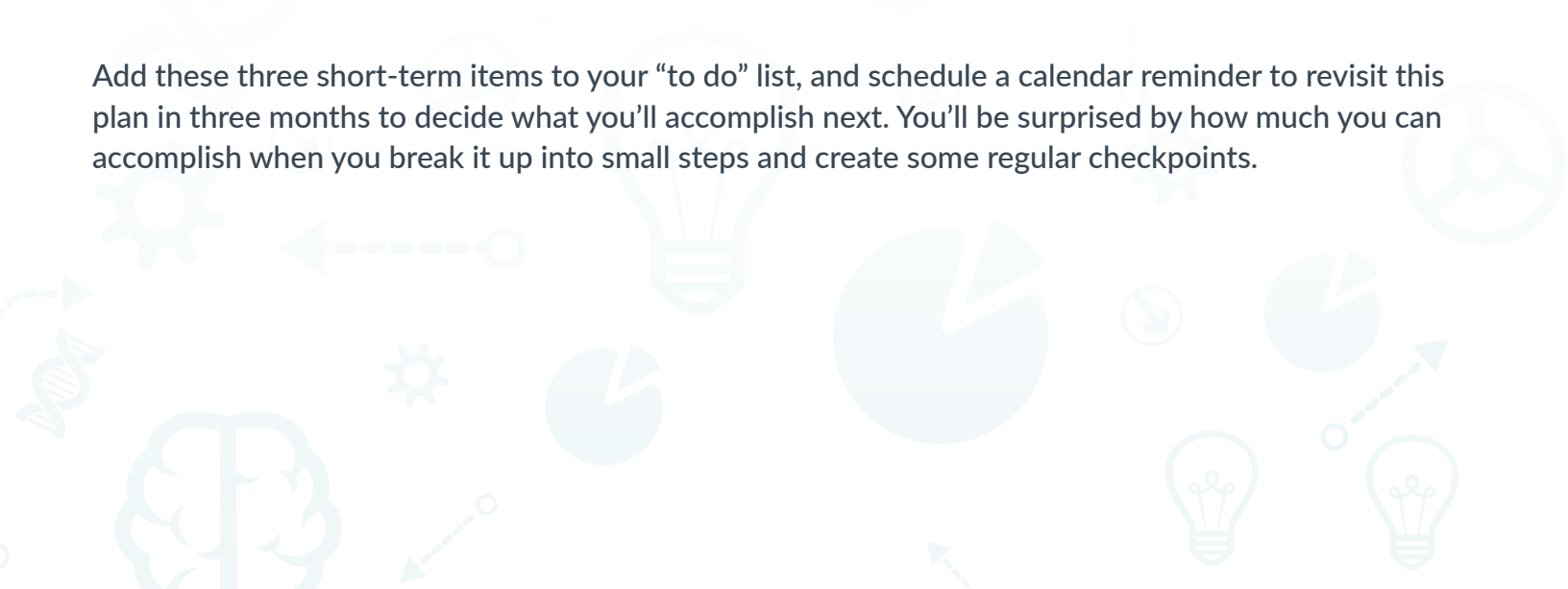
2. \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_

Add these three short-term items to your "to do" list, and schedule a calendar reminder to revisit this plan in three months to decide what you'll accomplish next. You'll be surprised by how much you can accomplish when you break it up into small steps and create some regular checkpoints.





# Nine Questions You Should Ask Every Nonprofit

A guide to help you choose the right nonprofits



Learning more about the nonprofits you support will help you feel confident that you are choosing effective organizations—and that your support is really making a difference. This worksheet will help you have a brief conversation or email exchange with a nonprofit to uncover key information about the organizations you are considering supporting. It doesn't take a lot of time to reach out. And most nonprofits will not only be able to answer these questions easily, they will also welcome inquiries that help prospective or current donors learn more about what they do.

**Tip:** If you don't have a contact at the organization already, reach out to either the general number or email address listed on the website or to the number for the development team.

## Set the stage

Let them know who you are and your interest in supporting organizations that align with your target issue or interest area.

*Example: I'd really like to learn more about the work you do, and I wanted to speak to someone who can answer a few questions for me. It will take about 20 minutes. Would you be able to help, or is there someone on the development team I can speak with?*

## Learn about programs and goals

I'd like to start by asking a few questions about the work you do.

- What's your most successful program and why? Give me your best example of the way you've seen your organization's work make a difference?
- What are areas of opportunity for your organization? What could you do better?
- Do you have a strategic plan? What key things are you trying to accomplish in that plan?
- Is there anything that you wish more people knew about your organization or the issues you are trying to solve?

# Learn about resourcing and opportunities

Now I'd like to better understand how you are funded and what your greatest needs are.

- Where does most of your funding come from? What percentage of your budget comes from private donations, and what do private donations help you to do that your other sources of funding don't cover?
- What are your most urgent needs?
- What would make the greatest difference in helping your organization get better at what it does?

## Notes

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# Learn how they engage supporters

I'd like to wrap up by finding out a little more about how you involve your supporters.

- If I wanted to get to know the organization better, what are the best ways to learn more?
- How do you keep your supporters up to date about your work?

## Notes

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**Don't forget: Thank the organization for its time!**

## Go Deeper

The nine questions above provide a foundation for understanding a charity and its needs. As your level of support or involvement increases, you may want to ask some additional questions.

### Some ideas for future conversations:

- How do you measure and report on the effectiveness of your programs?  
Do you have any plans to change or improve your evaluation process?
- What are the main obstacles that stand between you and your mission, and how do you plan to overcome them?
- Do you regularly have the resources to cover your budget? Why or why not?
- How would you compare your programs and results to others working in the same field?
- What is your staff really good at? What are gaps?
- What are the steps you are taking to achieve your strategic goal?
- How do you work with peers who address similar issues?  
How do you mobilize others around your mission?
- How can I get more involved?

Fidelity Charitable is committed to providing you with resources to help you make giving as fulfilling as possible.

## Want to learn more about smart giving?

📄 **VISIT** [FidelityCharitable.org/smarter-giving](https://FidelityCharitable.org/smarter-giving)

☎ **CALL** 800.952.4438

