

Inspired Philanthropy:
Your Step by Step Guide to Creating a Giving Plan and Leaving a Legacy
www.inspiredphilanthropy.com

Worksheet 7.3
Giving Intention

Name of organization: _____

Date of gift: _____ Amount of gift: \$ _____

With this gift/donation, I want to participate in

- _____ The spirit of generosity and faith
- _____ Supporting someone I trust or respect
- _____ Sustaining the mission of an organization I believe in
- _____ Working with other donors or nonprofit leaders
- _____ Increasing the financial capacity of an organization
- _____ Helping to leverage more resources through a challenge gift
- _____ Advancing leadership capacity within an organization through money or time given expressly for trainings or expansion
- _____ Providing support for direct services to constituents
- _____ Helping to provide specific outreach or support to a targeted population or a specific geographic area
- _____ Assisting to ensure that the issues being addressed by this organization or leaders get media or PR exposure
- _____ Providing tangible goods (clothes, computers, desks, food)
- _____ Ensuring public policy or advocacy linkages
- _____ Designating money for research or documentation
- _____ Helping a group or community do better planning, visioning, or collaborating
- _____ Contributing to public education options
- _____ Funding an artistic presentation, interpretation, or expression
- _____ Attaining visibility or recognition for our family or business
- _____ Other:

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Giving Intention, Cont'd

For gifts of more than \$5,000 Name of organization: _____

1. The organization and I have set detailed goals or agreed on the expected impact of my gift:
_____ Yes _____ No

Comments or notes:

2. At the time of my gift I specified how and if I wanted to be recognized.

_____ I was specific with _____ (person's name) at
_____ (name of organization) about my wish to remain
anonymous; we spoke on _____ (date) in person/phone/in writing (attach letter
to file).

_____ I do not wish to remain anonymous.

Comments or notes:

3. I spoke with _____ (person's name) in the
organization on _____ (date) about reports I do and do not want to receive on
the organization's work.

Example: "I spoke with Niki Newago on July 16th about the fact that I only wish to receive the
annual report and one call or visit a year."

Comments or notes: