

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

Exercise 10.1
Level of Engagement

List the groups in your giving plan from Worksheet 7.1 in Chapter Seven and indicate the level and nature of your engagement in each, based on the levels of engagement shown in Figure 10.1. For instance, you may be a donor, on the board, a volunteer, or a simple fan.

If there are groups you are engaged with that are not on your giving list, include them as well. Now star (*) or check (√) the organization(s) with which you might like to engage or participate more. Put a minus sign (–) by groups that you may want to step back from or with which you may be changing your engagement. Some of these may be groups or leaders you have supported for a long time, and you may be ready to seek new partnerships now.

Organization	Level of Engagement (1,2,3,4)	Nature of Engagement	Notes: Next Steps (If Any) and by When

Now, in the final column, note what action steps you will take for each of the groups you want to make a change with, based on your new considerations: state a goal, your next step, and the date by which you will take a step for greater or different engagement.