

# YOUR PATH OF PHILANTHROPY

A WORKBOOK FOR YOUR CHARITABLE GIVING





# INTRODUCTION

At Stark Community Foundation, we are here to help you on your personal path of philanthropy. This customized workbook is designed to ask you important questions that will help guide your charitable giving and shape your legacy. Feel free to complete this book all at once or go at your own pace.



# SHARE YOUR STORY



These important details of your life will guide your philanthropic plans as well as assist Foundation staff to identify your interests and path to giving.

Name:

---

Address:

---

Date of Birth:

Birthplace:

---

If you're not native to Stark County, what brought you here?

---

---

Other places you've lived:

---

---

Parents' Names:

---

Education (High School, College, etc.):

---

---

Military Service:

---

Employment History/Career Fields:

---

---

---

Civic Memberships:

---

Religious Affiliations:

---

Children's Names and DOBs:

---

---

---

Personal Interests (Hobbies, Cultural Interests, Other Activities):

---

---

---

---

---

# START YOUR GIVING JOURNEY



Have you ever taken a step back and analyzed your giving history? We would like to help you recognize your philanthropic patterns and reasons you chose to donate your hard-earned money to great causes.

Why do you give? (In just a few words, tell us what inspires you to give back.)

Take a moment and think about how you've given back in recent years.

Have you volunteered your time and skills or donated money to support causes you care about?

List the organizations you've supported in the past and tell us why.

Where do you focus your philanthropy?

- I support one cause and give to that organization every year.
- I have a few specific interests or targeted geographic areas that I support.
- I am passionate about many causes and different locations.
- I am spontaneous with giving and donate as issues arise.
- Other:

Organization

Reason for Support

Frequency

Program Area

*\*ABC Library*

*I'm a former educator*

*Annually*

*Children's literacy*

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

*\*The first row is an example.*

Then, ★ which giving experience gave you the most gratification.

Then, ✕ which giving experience gave you the least satisfaction.



# LIVE YOUR GENEROUS LIFE

Not only do the organizations you donated to appreciate your generosity — our community is a better place because you care. The staff at Stark Community Foundation would like to help you realize the power of your giving and the possibilities to change the world in the future.

## How do you choose what organizations and projects to support?

- I make all giving decisions based on my own interests.
- Family members identify organizations and projects.
- We review information sent from organizations and choose which projects match our goals and interests.
- We develop guidelines for our philanthropy and allow organizations to apply for funding through a request for proposal process.
- Other:

---

---

---

## If you could solve a problem, what would it be?

---

---

---

---



## What has been your MOST meaningful act of generosity?

---

---

---

---

## What has been your LEAST meaningful act of generosity?

---

---

---

---

## With whom do you discuss your giving decisions?

---

---



# PICTURE YOUR LEGACY

Do you want to bring positive change to the world? Do you want to show others that someone cares? Leaving your philanthropic legacy is not only beneficial for your family, it is needed to provide an example to all.

What do you want your community to remember about you?

---



---



---

What do you want your family and loved ones to remember about you?

---



---



---

Remember the 'Picture Your Legacy' cards we gave you? Please take a few minutes and complete the brief exercise by choosing three images that instinctively speak to you and that represent how you aspire to fund, operate, invest or be in the world. Then, write what these images evoke or immediately bring to your mind.

## Image

*\*Kids picking fresh vegetables*

- 1.
- 2.
- 3.

## Significance

*Hands-on education*

*\*The first row is an example.*

# RECORD YOUR VALUES

Values play a major role in how we live our lives. What are your values? Circle any that apply.

- |                  |              |                 |
|------------------|--------------|-----------------|
| Acceptance       | Faith        | Personal Growth |
| Access           | Family       | Preservation    |
| Acknowledgment   | Freedom      | Pride           |
| Change           | Generosity   | Privacy         |
| Collaboration    | Happiness    | Respect         |
| Commitment       | Healing      | Responsibility  |
| Communication    | Honesty      | Security        |
| Community        | Humility     | Self-expression |
| Compassion       | Independence | Self-reliance   |
| Conservation     | Innovation   | Service         |
| Creativity       | Integrity    | Simplicity      |
| Democracy        | Involvement  | Stability       |
| Dignity          | Joy          | Tolerance       |
| Diversity        | Justice      | Transformation  |
| Education        | Knowledge    | Truth           |
| Empathy          | Leadership   | Wisdom          |
| Entrepreneurship | Loyalty      | Other(s): _____ |
| Equality         | Merit        | _____           |
| Excellence       | Opportunity  | _____           |
| Expertise        | Passion      |                 |
| Fairness         | Peace        |                 |

**NOW, ★ YOUR TOP 5.**

# IDENTIFY YOUR AREAS OF INTEREST

Peruse the list below and circle the areas that pique your interest.

## ADULT EDUCATION & LITERACY

### ANIMALS

- Animal Welfare & Protection
- Wildlife Protection
- Zoos & Aquariums

### ARTS, CULTURE & HUMANITIES

- Historical Preservation
- Literary
- Performance
- Visual

### CIVIL RIGHTS & ADVOCACY

- Civic Engagement
- Equal Rights
- Public Policy & Advocacy

### COMMUNITY IMPROVEMENT

- Neighborhoods
- Public Spaces

### CRIME PREVENTION & LEGAL SERVICES

### DISASTER PREPAREDNESS & RELIEF

### DISEASES, DISORDERS & MEDICINE

- Medical Research

### ECONOMIC DEVELOPMENT

### EDUCATION

- Elementary & Secondary
- Higher Education
- Preschool
- Scholarships
- Specialized Tutoring

### EMPLOYMENT

- Job Training & Placement
- Vocational Counseling

### ENVIRONMENTAL

- Botanical
- Natural Resources & Conservation
- Recycling
- Water

### FAITH-BASED ORGANIZATIONS & RELIGION

### FINANCIAL LITERACY

### FOOD, AGRICULTURE & NUTRITION

- Agriculture Programs
- Food Pantries & Foodbanks
- Hot Meal Programs
- Meal Delivery

### HEALTH & WELLNESS

- Disability
- Health Care Delivery
- Mental Health & Crisis Intervention
- Substance Abuse

### HOUSING & SHELTER

- Affordability
- Home Improvement & Repairs
- Homeless Shelters
- Senior Housing
- Subsidized Housing

### HUMAN SERVICES

- Accessibility
- Aging
- Children, Youth & Family Services
- Domestic Violence

### INTERNATIONAL AFFAIRS & NATIONAL SECURITY

### MARINE SCIENCE & OCEANOGRAPHY

### PARKS & RECREATION

### PHILANTHROPY & VOLUNTEERISM

### PHYSICAL & EARTH SCIENCE

### SCIENCE & TECHNOLOGY

- Astronomy
- Biological & Life Sciences
- Chemistry
- Computer Sciences
- Engineering & Technology

### YOUTH DEVELOPMENT

- After-School Programs
- Early Childhood
- Service Clubs
- Youth Centers

### DID WE FORGET ANYTHING?

WRITE IN ADDITIONAL AREAS OF INTEREST:

---



---



---



---



---



**TRY TO NARROW YOUR LIST  
DOWN TO YOUR TOP 5:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# SET YOUR GIVING GUIDELINES

Will you divide your giving into percentages that match your identified areas of interest?  
Or, will you allocate a portion of money for your family members to support their favorite causes?

Example of Areas of Interest

- 50% food pantries and foodbanks
- 30% domestic violence
- 20% current issues



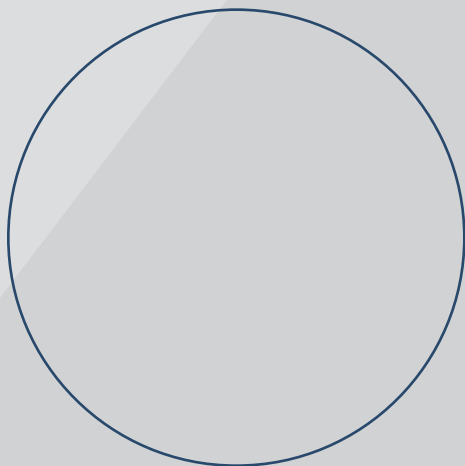
Example of Shared Family Interests

- 50% parents allocate
- 25% child #1
- 25% child #2

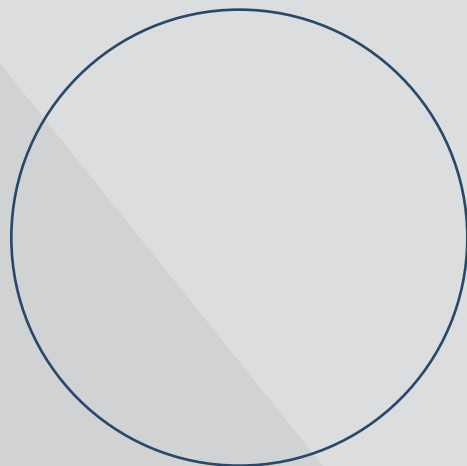


Use these charts below to illustrate your own giving guidelines.

AREAS OF INTEREST



SHARED FAMILY INTERESTS



# DEFINE YOUR ABSOLUTES

Are you only willing to support organizations within your areas of interest?  Yes  No

Will you give to causes outside of your community?  Yes  No

Ask yourself, what are your absolutes?

Example: I will only support animal rescue and adoption programs.

Under no circumstances will we support organizations outside of ABC Township.

---

---

---

---

---

---

---

---



# SEE YOUR GIVING IN ACTION

We want your charitable giving to have as much impact as possible. Seeing your generosity's power can come in many forms. How would you like to see your gifts in action? Check all that interest you.

- I would like to see the impact of my gift through a detailed written report along with pictures documenting the success of the organization.
- I would like to hear a simple testimonial from a client or staff member of the organization demonstrating the impact of my gift.
- I would like to have a conversation with the programmatic staff of the organization or perhaps the Executive Director.
- I would like to see firsthand the difference I am making with my generosity through a site visit.
- Other:

---

---

---

---



# CREATE YOUR GIVING PLAN

After you've completed these unique giving exercises, look back at your responses and start crafting your giving plan or mission statement that details your charitable goals.

*Example: Our fund seeks to improve the quality of life for disabled individuals in ABC Township.*

*We accomplish this by supporting therapeutic programs and agencies that provide independent living assistance.*

---

---

---

---

---

---

---

---

Now that you've completed *Your Path of Philanthropy*, please return your workbook to Stark Community Foundation.

A member of our Advancement Team will follow up to schedule a time to review your responses and provide guidance on how you can be more strategic in your giving. We can also connect you with causes within your areas of interest and provide analysis on what your gifts accomplished.

**Stark Community Foundation**  
donorservices@starkcf.org  
330-454-3426  
400 Market Avenue N, Suite 200  
Canton, Ohio 44702

*Your workbook responses will only be shared with Foundation staff and with successors named in your Fund Agreement.*

We are here to help you  
every step of the way on

# YOUR PERSONAL PATH OF PHILANTHROPY



400 Market Avenue N, Suite 200  
Canton, Ohio 44702-2107

© 2017 Stark Community Foundation