

## Giving Checklist

This Giving Checklist is a set of the tasks to consider tackling when ramping up your philanthropic giving. Despite the linear format of the checklist, the path you will take to getting more serious about your philanthropy is an individual—and often highly iterative—process. Choose which tasks make sense for your philanthropic journey. (You may decide to add more tasks later, or even re-do tasks when you are at a different stage of your journey.)

It will be helpful to know which legal giving structure(s) you have decided to use for your giving, as this decision will have implications for some of these tasks. (Read our [FAQ on legal structures](#) if you would like more guidance in this area.) You will also want to think through if and how you are seeking to involve your family in your philanthropy. (You may find the information [here](#) on family and philanthropy helpful.)

| Tasks | Will I need to do this? | Will I do this myself? |
|-------|-------------------------|------------------------|
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### What are my values and beliefs?

| Define and codify your values and beliefs   |  |  |
|---|--|--|
| Think through your values and beliefs.  |  |  |
| Write down these values and beliefs, likely in the form of a <a href="#">mission statement or statement of donor intent</a> . |  |  |
| Establish areas of strategic interest.  |  |  |
| Decide, in broad brushstrokes, what portion of your philanthropy will focus explicitly on results.                            |  |  |
| Think about the changes you envision resulting from your philanthropy.  |  |  |
| Decide whether to spend all your resources <a href="#">while living or give beyond your lifetime</a> .                        |  |  |

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|-------|-------------------------|------------------------|
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What is success and how can it be achieved?  
 What am I accountable for?

**Define the issues**

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| Define what “success” is for your philanthropy.  |  |  |
| Identify what needs to happen so your goal(s) can be met.  |  |  |
| Clarify the assumptions on which your strategy rests, including scouring other work in your field of interest. |  |  |
| Identify barriers to achieving your desired success.   |  |  |
| Develop an investment model that directs your resources to achieving your desired success.                     |  |  |
| Look into the work other funders are doing that may complement your own.                                       |  |  |

**Test the approach**

|   |  |  |
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| Pilot your investments in small ways.   |  |  |
| Set target milestones for these pilot investments.                                |  |  |
| Assess what actually happened vs. what you thought would occur.                   |  |  |
| Explore the risks and opportunities for your strategy, now that you’ve tested it. |  |  |

**Act and refine**

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| “Swing for the fences” and consider how your results change your approach. |  |  |
| Consider communicating changes in your strategy to others.                 |  |  |

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What will it take to get the job done?

| <b>Establish a governance structure</b>  |  |  |
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| Develop and regularly revisit bylaws and policies.   |  |  |
| Define desired role of the board.  |  |  |
| Decide on a leadership structure—including committee roles—for your board.   |  |  |
| Recruit members for the board of directors.  |  |  |
| <b>Secure advice</b>   |  |  |
| Get the right people, in the right roles, to help you pursue your strategy. (This may be through unpaid advisors, or paid consultants, contractors, or staff members.) |  |  |
| Ensure that staff, trustees, and volunteers understand their roles and decision-making responsibilities.   |  |  |
| Comply with tax and legal regulations.   |  |  |
| Understand tax implications.   |  |  |
| Access regulatory and legal support.   |  |  |
| Conduct ongoing compliance reporting.  |  |  |
| Coordinate the board of directors.   |  |  |
| <b>Manage finances and investments</b>   |  |  |
| Determine your asset management strategy.  |  |  |
| Set up IT and HR systems.  |  |  |
| Deliver funding to your chosen grantees.   |  |  |
| Perform financial management and reporting.  |  |  |

| Tasks  | Will I need to do this? | Will I do this myself? |
|--|-------------------------|------------------------|
| <b>Communicate externally</b>                    |                         |                        |
| Outline your public philanthropic message.       |                         |                        |
| Decide on stakeholders with whom to communicate. |                         |                        |
| Define key elements of your philanthropic brand. |                         |                        |
| Conduct public relations.                        |                         |                        |

### How do I work with grantees?

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| <b>Select and invest in grantees</b>   |  |  |
| Source <b>organizations</b> to find a set that you might want to support.                            |  |  |
| Screen <b>organizations</b> —through research and due diligence—to determine fit with your strategy. |  |  |
| <b>Structure investments</b> ; determine amount, time, and mechanism.                                |  |  |
| Select organizations for funding.  |  |  |
| Support <b>grantees</b> by providing access to strategic or technical support.                       |  |  |
| Sustain <b>grantee relationships</b> , evaluating continued fit with your goals.                     |  |  |
| When necessary, <b>end relationships</b> with grantees as thoughtfully as you began them.            |  |  |

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|-------|-------------------------|------------------------|
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Am I getting better?

**Monitor your own performance as a grantmaker**

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| Determine how you can most effectively track your progress (including, for example, gathering anonymous feedback from grantees). |  |  |
| Establish the baseline (how you are doing today) and appropriate goals.  |  |  |
| Collect data.  |  |  |
| Use data to assess progress toward goals and identify improvements to your approach.   |  |  |
| Implement improvements.  |  |  |
| As appropriate, communicate results and improvements to grantees and others who supplied data.                                   |  |  |

**Monitor grantee performance**

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| Work with grantees to understand what they will hold themselves accountable for achieving and how.       |  |  |
| Understand how grantees measure their progress, what metrics they use, and what they will report to you. |  |  |
| Consider ways to support grantees in data collection.  |  |  |
| As grantees collect data, ask them to share implications: Which changes will they make as a result?      |  |  |
| As grantees' programs evolve, discuss when external evaluations would be of most value to them.          |  |  |

## Other tasks

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### SOURCES USED FOR THIS ARTICLE:

- [About Giving Circles](#), Giving Circles Network.
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