

AWE Partners

Portfolio of Giving Worksheet

Name:

Date:

Core Values:

Personal/Family Mission Statement:

Gifts/Talents/Skills/Knowledge to Share:

**You will want to complete the following form for each of the causes and organizations you support.

Cause/Issue to Address:

What is the scope of the problem?

What are the root causes?

What goals/outcomes/solutions are you seeking?

What are you funding?

What is your time horizon for addressing this issue?

How will you assess progress/outcomes?

Organizations to Support:

What are the most effective organizations addressing this issue?

Will you focus at the local, national, or international level?

Are there organizations that are collaborating/engaged in collective impact?

Who are your contact people within the organizations?

Level of Engagement:

What level of engagement do you want to have?

Will you contribute time/volunteer?

Will you share your talent/engagement and in what ways?

Donations:

Will you donate money and, if so, in what form?

Will you provide in-kind support?

Will the funding you provide be unrestricted or program specific?

Will you donate annually or make a multiple year donation?

Will you use a giving vehicle and, if so, which one?