Organize your philanthropy by focusing on the issues that matter most to you.

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1.2

NARROW YOUR FOCUS AREAS

The simplest way to organize your philanthropy is to focus on several specific issues, rather than giving across many issues. While your philanthropic budget certainly can allow room for reactive and emergency giving (see Section 4: Structuring Your Giving), narrowing your focus areas for proactive giving helps prioritize your resources.

This is true even if your philanthropy is concerned with a particular community—for you cannot give to every possible cause. It is also true for donors who are motivated by the philosophy of effective altruism, which is concerned with alleviating the conditions of abject poverty and avoiding global catastrophes (see effectivealtruism.org for more information).

Continued on the following page.

ACTIVITIES

C  Look Back at Your Giving History
D  Select Your Issues
E  Craft Your Focus Statements
We have developed two activities to help you narrow your focus areas. Both activities help you reflect on issue areas and select a few to integrate into your initial giving plan.

1. **LOOK BACK AT YOUR GIVING HISTORY.**
   
   *Activity C* is for donors who have a significant history of giving. This activity will help you take stock of your past giving and determine trends and themes. From there, you can understand which issues you are most passionate about, assess how you have supported them in the past, and decide whether you would like to make adjustments.

2. **BEGIN WITH A CLEAN SLATE AND SELECT ISSUES WITHOUT RELYING ON PRECEDENT.**
   
   If you wish to start with a clean slate, *Activity D* will help you explore a range of potential issues and select those that align with your values and motivations.
Finally, effective philanthropists often narrow their focus even further by identifying a target population and location for each issue. For example, a philanthropist who selected “education” as an issue might narrow her focus area to adolescent girls’ math education on the South Side of Chicago. **Activity E** guides you through narrowing your focus to target populations and locations.

The Issue Card categories were selected from the National Taxonomy of Exempt Entities, developed by the IRS and the National Center for Charitable Statistics to classify nonprofit organizations.

nccs.urban.org/classification/national-taxonomy-exempt-entities
INSTRUCTIONS

Review your previous contributions and volunteer work over a given period of time to identify issues that are meaningful to you.
The following table reflects my giving history from __________________________ to __________________________

### GIFTS OVERVIEW

<table>
<thead>
<tr>
<th>ORGANIZATION / EVENT / PERSON</th>
<th>AMOUNT / FREQUENCY</th>
<th>IS THIS A ONE-TIME GIFT?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>American Red Cross</td>
<td>$25 / month</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
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<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Volunteering Overview

<table>
<thead>
<tr>
<th>Organization / Event</th>
<th>Time / Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Example</strong> American Society for the Prevention of Cruelty to Animals (ASPCA)</td>
<td>3 hours / week</td>
</tr>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
INSTRUCTIONS

Based on your giving history, answer the following questions.

Where did you give the most, in terms of both your financial resources and your time? Are there similarities among these recipients?

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...........................................................................................................................................................................
...........................................................................................................................................................................

Which issues prompted you to give the most, in terms of both your financial resources and your time? Did you concentrate your giving in any way (for instance, more time to one issue, more money to another)? Do those issues reflect what is most important to you today? You can select from the Issue Cards or write other issues on the blank Issue Cards, and then record them below.

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...........................................................................................................................................................................
...........................................................................................................................................................................
...........................................................................................................................................................................

Does your giving reflect your values? If yes, how? If no, why not?

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...........................................................................................................................................................................

Do you see any other themes or trends in your giving?

...........................................................................................................................................................................
...........................................................................................................................................................................
1.2

NARROW YOUR FOCUS AREAS

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Continued on the following page.
INSTRUCTIONS

The Issue Cards provide an overview of broad issue categories and include some blank cards for you to write in any other issues that might interest you—for example, a specific issue you already know you would like to fund. Read the Issue Cards and select the issues that you may be interested in supporting.
### Activity

#### Issue Cards

<table>
<thead>
<tr>
<th>Animal Related</th>
<th>Arts, Culture &amp; Humanities</th>
<th>Civil Rights &amp; Advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disaster Preparedness &amp; Relief</td>
<td>Education</td>
<td>Environment</td>
</tr>
<tr>
<td>Food &amp; Nutrition</td>
<td>Health</td>
<td>International Development</td>
</tr>
<tr>
<td>Law &amp; Society</td>
<td>Social Services</td>
<td>Other</td>
</tr>
<tr>
<td>Write In Your Own</td>
<td>Write In Your Own</td>
<td>Write In Your Own</td>
</tr>
</tbody>
</table>

**Instructions**

Review the front side of the Issue Cards that include the topics below. These cards provide an entry point into an issue. There are also three blank cards so that you can write in any specific causes that might be meaningful to you.
### Activity

**Issue Cards**

#### Instructions

For the Issue Cards selected, review the backside of the cards and circle any specific focus areas of interest (i.e. special education, cancer), or write in focus areas meaningful to you.

<table>
<thead>
<tr>
<th>Civil Liberties</th>
<th>Arts &amp; Culture</th>
<th>Animal Protection &amp; Welfare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civil Rights</td>
<td>Arts Services</td>
<td>Veterans Services</td>
</tr>
<tr>
<td>Democracy</td>
<td>Historical Organizations</td>
<td>Wildlife Preservation &amp; Protection</td>
</tr>
<tr>
<td>Intergroup &amp; Race Relations</td>
<td>Humanities</td>
<td>Zoos &amp; Aquariums</td>
</tr>
<tr>
<td>Voter Education &amp; Registration</td>
<td>Media &amp; Communications</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Museums</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Performing Arts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Visual Arts</td>
<td></td>
</tr>
<tr>
<td>Climate Change</td>
<td>Adult Education</td>
<td>Disaste Preparedness &amp; Relief Services</td>
</tr>
<tr>
<td>Environmental Education</td>
<td>Elementary &amp; Secondary Education</td>
<td>Search &amp; Rescue Squads</td>
</tr>
<tr>
<td>Natural Resources Conservation &amp; Protection</td>
<td>Graduate &amp; Professional Education</td>
<td></td>
</tr>
<tr>
<td>Pollution Abatement &amp; Control</td>
<td>Higher Education</td>
<td></td>
</tr>
<tr>
<td>Recycling Programs</td>
<td>Libraries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Special Education</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vocational &amp; Technical Education</td>
<td></td>
</tr>
<tr>
<td>International Human Rights</td>
<td>Diseases &amp; Conditions</td>
<td>Food Programs &amp; Security</td>
</tr>
<tr>
<td>International Peace &amp; Security</td>
<td>Hospitals &amp; Primary Healthcare</td>
<td>Nutrition</td>
</tr>
<tr>
<td></td>
<td>Medical Research</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mental Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Public Health</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rehabilitative Care</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Reproductive Health</td>
<td></td>
</tr>
<tr>
<td>Children &amp; Youth Services</td>
<td>Criminal Justice Reform</td>
<td></td>
</tr>
<tr>
<td>Fair Employment</td>
<td>Crime Prevention</td>
<td></td>
</tr>
<tr>
<td>Family Services &amp; Assistance</td>
<td>Law Enforcement</td>
<td></td>
</tr>
<tr>
<td>Housing &amp; Shelter</td>
<td>Legal Services</td>
<td></td>
</tr>
<tr>
<td>Labor Unions</td>
<td>Protection Against Abuse</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rehabilitation Services</td>
<td></td>
</tr>
</tbody>
</table>

**Write in your own**

- Climate Change
- Environmental Education
- Natural Resources Conservation & Protection
- Pollution Abatement & Control
- Recycling Programs
- Adult Education
- Elementary & Secondary Education
- Graduate & Professional Education
- Higher Education
- Libraries
- Special Education
- Vocational & Technical Education
- Diseases & Conditions
- Hospitals & Primary Healthcare
- Medical Research
- Mental Health
- Public Health
- Rehabilitative Care
- Reproductive Health
- Children & Youth Services
- Fair Employment
- Family Services & Assistance
- Housing & Shelter
- Labor Unions
- Criminal Justice Reform
- Crime Prevention
- Law Enforcement
- Legal Services
- Protection Against Abuse
- Rehabilitation Services
- International Human Rights
- International Peace & Security
- Fair Employment
- Family Services & Assistance
- Housing & Shelter
- Labor Unions
- Animal Protection & Welfare
- Veterinary Services
- Wildlife Preservation & Protection
- Zoos & Aquariums
- Arts & Culture
- Arts Services
- Historical Organizations
- Humanities
- Media & Communications
- Museums
- Performing Arts
- Visual Arts
- Disaster Preparedness & Relief Services
- Search & Rescue Squads
- Food Programs & Security
- Nutrition
- International Human Rights
- International Peace & Security
- Fair Employment
- Family Services & Assistance
- Housing & Shelter
- Labor Unions

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INSTRUCTIONS
Review the front side of the Issue Cards. Think about your personal interests, particularly segments of society you want to help, and their specific needs. Then select up to five cards that resonate most with you. Next, review the backs of your selected cards. Circle the focus areas you noted as being of interest (e.g. special education, cancer) or write in focus areas that are meaningful to you. Note any reflections you have in the space on the next page.
A focus statement frames your values and motivations and connects them with your philanthropic intentions. A strong focus statement can help guide your philanthropic plan. While you may want to have an overall giving statement the same way some nonprofits have vision and mission statements, we recommend also creating a separate focus statement for each issue, including the specific population and location you would like to serve.

**EXAMPLE**

*We aim to address education inequality for low-income secondary school students in Grand Rapids Public Schools because this aligns with our commitment to equity in public education.*

**INSTRUCTIONS**

Craft short statements that articulate your intention for how to address each of your selected focus areas.

If you don’t yet feel ready to articulate focus statements, you can return to them later in this toolkit or as you actually engage in giving, recognizing that they may change over time.

If you need additional inspiration, you can look online for various resources on crafting vision, mission, and focus statements. Feel free to borrow from statements that inspire you and rework them to make them your own.
INSTRUCTIONS
Complete the statement below, using your selected Value Cards and Issue Cards to identify the essential components. Craft focus statements for each of your focus areas in the space below.

We aim to address [WHAT] for [WHO] [WHERE] because this aligns with our commitment to [WHICH VALUES].

WHAT: What causes/issues do you want to address with your philanthropy (e.g., environment, education, animal-related)?

WHO: Who will benefit from your philanthropy (e.g., people experiencing homelessness, children from low-income backgrounds, abused animals)?

WHERE: Where, geographically, will you focus your philanthropy (e.g., a specific location, locally, statewide, nationally, globally)?

WHICH VALUES: Which values are driving your goal (e.g., respect, diversity, empathy)?

Example:
We aim to address EDUCATION INEQUALITY for LOW-INCOME SECONDARY SCHOOL STUDENTS in GRAND RAPIDS PUBLIC SCHOOLS because this aligns with our commitment to EQUITY IN PUBLIC EDUCATION.
Keep these four principles in mind:
  • Be specific.
  • Use simple language (avoid buzzwords).
  • Keep it concise.
  • Make it actionable.

1.
We aim to address ........................................................................................................
for ....................................................................................................................................
........................................................................................................................................
because this aligns with our commitment to ............................................................
........................................................................................................................................

2.
We aim to address ........................................................................................................
for ....................................................................................................................................
........................................................................................................................................
because this aligns with our commitment to ............................................................
........................................................................................................................................
3. We aim to address  .................................................................
for ...........................................................................................
..............................................................................................
because this aligns with our commitment to  ..........................
..............................................................................................

4. We aim to address  .................................................................
for ...........................................................................................
..............................................................................................
because this aligns with our commitment to  ..........................
..............................................................................................

5. We aim to address  .................................................................
for ...........................................................................................
..............................................................................................
because this aligns with our commitment to  ..........................
..............................................................................................

Additional workbooks from The Philanthropy Toolkit are available on the Forms and Resources page of NPT GivingPoint.