

# Create an action plan

## Plan your next steps to create impact with your giving

You've decided how you most want to make a difference with your giving. But how do you get started? This worksheet will help you create an achievable action plan to accomplish your giving goals, including identifying the immediate next steps to take.



### 1. Learn more

What will you need to know to make a difference? Check off all the action items you'd like to take on to better understand your target issue or area.

#### First steps:

- Develop a list of nonprofits doing work in your area of interest and research them online.
- Conduct online research about most effective approaches to solving the problems or serving the communities you care about.

#### Next steps:

- Call a nonprofit to learn more about what it does and what it needs.
- Connect with other donors who share your passion and ask them questions.
- Read information published by large foundations focused in your funding area.
- Speak with experts on your issue or interest area.
- Attend events related to your issue or interest.
- Set up an online news search to stay current on your issue or interest area.
- Track ongoing conversations and key stakeholders on social media.
- Read information published by issue area affinity groups or associations.
- Talk to people closest to the problem or most impacted by your issue or interest area.
- Investigate whether a philanthropic advisor could assist with creating your plan.
- Join a donor network focused on this giving area.
- Other \_\_\_\_\_



## 2. Decide how you want to help

Your time, talents, skills, networks, and experiences can be valuable assets for your giving. Consider what you're willing or able to do in addition to providing any financial support.

### First steps:

- Create a list of the skills and expertise you bring to the table. Identify the skills you would—and wouldn't—like to use in your philanthropy.
- Commit to spending a specific amount of time each month on your philanthropy.
- Reach out to organizations to explore volunteer opportunities.

### Next steps:

- Invite others in your network to an event to learn more about an issue.
- Make an introduction between the nonprofit and a contact who could help them.
- Commit to serve on a board or committee, lead or participate in a volunteer project, or take on another regular volunteer role.
- Host a fundraiser or advocacy event.
- Approach a nonprofit about initiating a project.
- Attend a public meeting or event to advocate.
- Write a letter to the editor, a lawmaker, or other influencer to raise awareness.
- Notify a nonprofit that you are willing to be an advocate on its behalf.
- Talk with friends about how they connect with causes they care about.
- Other \_\_\_\_\_

---

---

---

### 3. Allocate your financial resources

How will you fund your giving? Consider how you can best use your financial resources to achieve philanthropic impact.

#### First steps:

- Create a budget for giving on a monthly or annual basis.
- Create target short- and long-term donation amounts and frequency.
- Discuss giving goals with your family or partner.
- Evaluate whether the current charities you support align with your mission, and if necessary, reallocate funds to align with priorities.
- Discuss charitable giving with your advisor, and say you'd like to incorporate into your financial or legacy plan.

#### Next steps:

- Explore options for including charitable giving in a legacy plan.
- Investigate corporate matching-gift options at your workplace.
- Make a charity a beneficiary of your will or estate plan.
- Investigate whether a giving vehicle such as a charitable annuity or donor-advised fund could be right for you.
- Take steps to set up a charitable giving vehicle.
- Speak with someone who works in fundraising at one of your target nonprofits to determine what you can achieve at various levels of donation.
- Identify a "stretch gift" you'd like to make and put it in your budget.
- Explore options to create a prize or challenge grant, or create other leverage with your gifts.
- Pool your resources with others, such as family members or through a giving circle, to have a greater impact with your giving.
- Look into aligning your personal investment strategy with your philanthropic strategy.
- Other \_\_\_\_\_

---

---

---



## 4. Commit to your action plan

You've identified the action steps you'd like to take to achieve your charitable mission.

Now, choose the steps from the list above that you'd like to prioritize this year and write them below.

### This year, I will...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Next, choose one to three steps from the list above that you can commit to doing in the next three months and write them below.

### Within the next three months, I will...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Add these three short-term items to your "to do" list, and schedule a calendar reminder to revisit this plan in three months to decide what you'll accomplish next. You'll be surprised by how much you can accomplish when you break it up into small steps and create some regular checkpoints.

Date created \_\_\_\_\_ Review \_\_\_\_\_

Fidelity Charitable is the brand name for the Fidelity Investments® Charitable Gift Fund, an independent public charity with a donor-advised fund program. Various Fidelity companies provide services to Fidelity Charitable. The Fidelity Charitable name and logo, and Fidelity are registered service marks of FMR LLC, used by Fidelity Charitable under license.

734597.2.0