



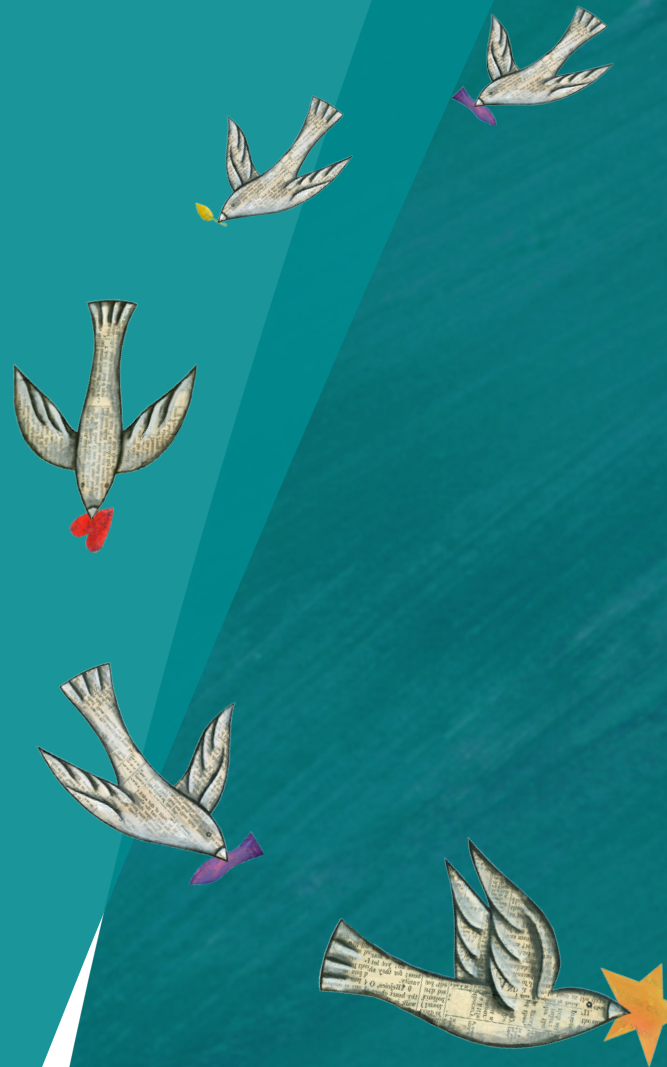
**inFaith**

COMMUNITY FOUNDATION®

Spreading Joy. Changing Lives.

# YOUR INFaITH GIVING PLAN

Set Your Course Well



## SPREADING JOY. CHANGING LIVES.

The things we hold dear—our faith, values and life experiences—are what motivate our giving. It is through giving that we have the chance to act upon the values and causes close to our heart.

The desire to do this well is the reason a thoughtful giving plan is so important. A plan allows you and generations to come to do this work with purpose and vision—and help achieve the change you want to see. It also provides InFaith Community Foundation with the insight needed to work on your behalf.

Through this plan you also have an opportunity to tell the story of what is central to what you believe and influence the arc of the world around us.

### HOW TO START

To begin, set aside time to give this process your full attention. This booklet will prompt you to focus and clarify your giving plans, and will help you articulate your beliefs and desires.

You may find it helpful to go through this process with your family or others who are involved with your plan for giving. Alternatively, InFaith staff can assist you with this process and help tailor a giving plan incorporating your values and interests.

**Step 1** Your Giving Goals: Questions to Jumpstart Your Giving (pages 3 - 4)

**Step 2** Reflecting on Your Journey (page 5)

**Step 3** Articulating Your Mission (page 6)

**Step 4** Acting on Your Mission (page 7)

**Step 5** Sharing Your Charitable Goals (page 8)

**Step 6** How InFaith Can Help (page 9)

**Step 7** Evaluation & Your Next Steps (page 10)

The questions on the following pages are designed to guide your process for creating a focused giving plan. InFaith staff can help you with this process and tailor a giving plan to your values and interests.

Your Name(s): \_\_\_\_\_ Date: \_\_\_\_\_

Your Donor Advised Fund Name: \_\_\_\_\_

## CONTACT US

At InFaith Community Foundation, we're here to serve you and your giving interests. To learn more, contact:

[inFaithFound.org](http://inFaithFound.org) 625 FOURTH AVENUE SOUTH, SUITE 1500, MINNEAPOLIS, MN 55415

[p 800.365.4172](tel:800.365.4172) [f 612.844.4109](tel:612.844.4109)



## YOUR GIVING GOALS: QUESTIONS TO JUMPSTART YOUR GIVING

*These questions are from InFaith's one-page worksheet titled "Your Giving Goals: Questions to Jumpstart Your Giving."*

Think of this worksheet as a starting point, a scratchpad for approaching your giving through InFaith Community Foundation. If you wish, invite family and friends in the discussion. Once completed, please send a copy to InFaith for your donor advised fund documents, so we can better understand your giving goals and ensure your intentions are met. For a more in-depth tool to explore your giving interests, contact InFaith for a copy of Set Your Course Well: Your InFaith Giving Plan.

**REASONS YOU GIVE.** Imagine you're telling your friends or family why you give — what would you share with them?

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**ABOUT YOUR PASSIONS.** What are you passionate about? What makes your heart soar? \_\_\_\_\_

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**DREAM FOR TOMORROW.** If you could change one thing about what the world looks like in the future, what would it be? \_\_\_\_\_

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**ABOUT THE NEEDS AROUND US.** What current local, national or global issues and needs concern you the most?

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**YOUR GUIDING VALUES.** What values are important to you? Which do you want expressed through your giving?

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**YOUR FAITH.** How does your faith influence your giving?

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*(continued, over)*

# YOUR GIVING GOALS: QUESTIONS TO JUMPSTART YOUR GIVING

*continued*

**WHERE THE GOOD WORK HAPPENS.** Think of an organization you admire. What do you like about what they do? \_\_\_\_\_

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**GETTING SPECIFIC.** How do you want your benefiting charity(ies) to use your gift? Do you want to support general operating expenses, address a specific need or target a geographical area? \_\_\_\_\_

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**THE BIG PICTURE.** Look at the answers you provided on this worksheet. What patterns do you see? What do your answers tell you about your motivation and focus for giving? \_\_\_\_\_

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*The questions on this page and the previous (pages 3 & 4) are pulled from InFaith's one-page worksheet titled "Your Giving Goals: An Easy Way to Get Started." Should you wish to have a copy of this document, please visit [inFaithFound.org/generationsgive](http://inFaithFound.org/generationsgive), or call 800-365-4172.*

## REFLECTING ON YOUR JOURNEY

Some people find it easier to identify causes, interests or issues from a list. What of the following do you care about supporting through your giving most? Check all that apply.

### Faith-based Programs & Ministries

- My church
- Church body support
- Ecumenical efforts
- Global ministries
- Multicultural ministries
- Children and youth ministries
- Senior ministries
- Prison ministries
- Campus ministries
- Maritime/Armed services ministries
- Outdoor ministries (camps, etc.)
- Media ministries (TV, radio, websites, etc.)
- Faith-based nursing homes/long-term care facilities
- Parish nurse programs
- Bible translation
- Church administration
- Pastoral continuing education
- Lay ministry/lay leadership
- Worship
- Building/facilities/capital preservation

### Education

- Preschools
- K-12 schools
- Colleges and universities
- Seminaries
- Scholarship support
- Extension/adult learning

### Disaster Relief

- U.S. disaster relief
- International disaster relief

### Environmental Issues

- Pollution/global warming
- Natural resources/conservation
- Animal protection/endangered species
- Zoos/aquariums

### Health Issues & Services

- Hospitals
- Medical research
- Alcohol/substance abuse
- Health and spirituality
- Specific diseases (please describe):

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### Social Issues & Services

- Crime prevention
- Domestic violence/child abuse
- Legal services/legal aid
- Economically disadvantaged populations
- Employment/jobs
- Food/nutrition/hunger
- Immigrants/refugee services
- Homelessness/housing
- Child care/early development
- Seniors/elderly
- Persons with disabilities
- Other human services (please describe):

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### Arts, Culture & Humanities

- Libraries
- Museums
- Historic preservation
- Music
- Theater
- Dance
- Arts education
- TV, radio, film

### Other

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



## ACTING ON YOUR MISSION

Consider how you want your donor advised fund to operate. The nuts and bolts of your giving plan will help ensure you achieve your charitable goals.

1. If you have more than one organization or cause you'd like to support, share the percentage of your giving:

ORGANIZATIONS YOU'D WISH TO SUPPORT	PERCENT OF YOUR GIVING
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

2. Are you interested in providing funding for a charity's general operating expenses?

Yes  No

3. Are you interested in providing capital support (such as building construction or renovations)?

Yes  No

4. Are you interested in providing support for specific projects or programs of a charity or nonprofit?

Yes  No

5. Where do you wish to give?

Locally  Nationally  Globally

6. Are you interested in providing:

Ongoing support to charities  
 Making one-time gifts to charities

7. Your giving would be best described as:

One major grant each year  
 A few larger grants each year  
 Several smaller grants each year  
 A combination of large and small grants

8. What information do you need to help you decide which organizations/projects to support?

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## SHARING YOUR CHARITABLE GOALS

Besides providing InFaith Community Foundation with information about your charitable goals, there are likely others who you will want to inform about your wishes, including family members, children, grandchildren and friends. Sharing your giving plan allows others to help you live out your desires and fosters a broader awareness for giving.

1. Make a list of people who should know about your giving plans.

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2. Do you want them involved in the decision making? If so, how?

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3. If others are involved in the decision making, how will you get their input into the process? (We strongly encourage personal meetings, although letters, email exchanges or phone conversations may also work for you.)

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## WE'RE HERE TO SERVE YOU

InFaith Community Foundation's donor services department is here to help make the most of your giving plans. Contact us for help to:

- Recommend new grants from your fund, check the status of a grant request, or request that a grant be expedited;
- Create or refine your giving goals;
- Update your Fund Agreement with new beneficiaries, advisors or contingencies;
- Research charities that match your charitable goals and values;
- Follow-up with charities on how grant support was used;
- Discuss unique grantmaking scenarios (i.e., international grants),
- Schedule a personal visit or phone review of your charitable fund; or,
- Connect you to a gift planner to make additional gifts to your fund.

**Contact us** at 800-365-4172 or email [contact@inFaithFound.org](mailto:contact@inFaithFound.org).

## LEARN MORE ABOUT CHARITIES

### **Charity Navigator** - [CharityNavigator.org](http://CharityNavigator.org)

Charity Navigator is America's leading evaluator of charities. Their rating system examines two broad areas of a charity's financial health - how responsibly it functions day-to-day and how well positioned it is to sustain its programs over time. Each charity is then awarded an overall rating of zero to four stars.

### **GuideStar** - [GuideStar.org](http://GuideStar.org)

With free registration you can view information on all 1.8 million nonprofits listed with GuideStar, and all are formally registered with the IRS or have proven they meet all IRS criteria for exempt organizations.

### **Charities Review Council:** [SmartGivers.org](http://SmartGivers.org)

Visit this website to take a closer look at charities before making your important social investment.



## LOOPING BACK ON YOUR GOOD THINKING

Your preferences for giving will likely evolve over time. We encourage you to set a time to revisit this document and contact us to make sure your giving remains aligned with your charitable goals. It's a great time to determine whether your goals are still relevant and to examine the patterns and impact of your giving. Put a reminder on your calendar today for a day three-to-five years from now.

## THANK YOU FOR DOING THIS IMPORTANT WORK

Through this document, you have articulated your values and wishes for your charitable giving. Your responses to questions also provide InFaith with valuable insight so we can assist you with your giving. Once you have completed this booklet, please send it to InFaith:

InFaith Community Foundation  
625 Fourth Avenue South, Suite 1500  
Minneapolis, Minnesota 55415

Phone: 800-365-4172  
Fax: 612-844-4109  
[inFaithFound.org](http://inFaithFound.org)

InFaith will return the original booklet to you and keep a copy on file as record of your giving intentions.

## VISION

Throughout our community and by God's grace, we will achieve effective, positive and lasting change.

## MISSION

To serve our donors with integrity as together we change lives and spread joy by sharing our blessings with the world.

## VALUES

As a Christian organization, our work reflects our service, stewardship, collaboration, possibilities and results.

## WE OFFER

- Donor advised funds, giving circles, collaborative funds and organizational endowments
- Full range of giving options, from simple to complex
- Flexibility to give to any charity
- Maximum tax benefits based on when and how you give
- Donor-centered services including online access and family giving resources
- Mission-based investments for charitable assets

InFaith Community Foundation is committed to environmental stewardship, printing on paper made from 100% post-consumer fiber using Green-e Certified renewable energy and meeting Forest Stewardship Council standards.

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