



A Note About SVP's Philanthropy Curriculum

Social Venture Partners' Philanthropy Curriculum has been designed to be delivered by any experienced facilitator. While a basic understanding of the content and audience will be helpful, the facilitator does not need to have extensive expertise on the topic.

The courses were designed by the instructional design team at [Endurance Learning](#) using best practices based on research about adult learning. They don't rely heavily on presentation, focusing instead on reflection, conversation and simulations to enhance the knowledge and skills of Partners and other participants. Each course was tested by partners and staff from across the network, both in-person and online.

The content is scalable, equally effective if delivered around a table to a group of 3 or 4 or as a more formal workshop with a group of 30 or 40. If you are delivering the content as an e-workshop, we recommend a tool like [zoom.us](#), that includes features such as whiteboards, breakout rooms, chatting and polling.

While the courses were originally designed with new SVP Partners in mind, long-time Partners and staff in the pilots shared their view that all Partners will benefit from the content. In fact, community partners and individual philanthropists of all kinds can benefit, and SVP encourages wide spread dissemination of all the information herein. It is an open source document.

If you have any questions regarding SVP's Philanthropy Development Curriculum, please contact Social Venture Partners International.

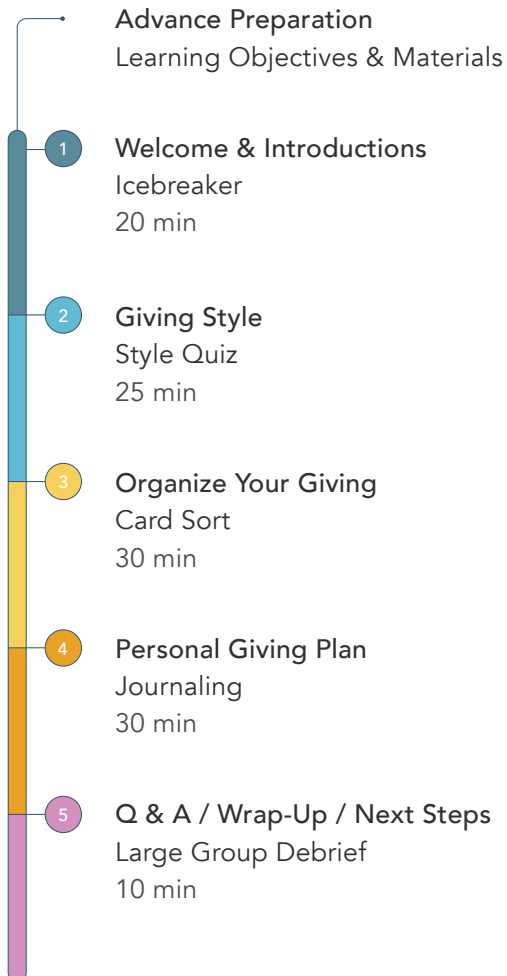


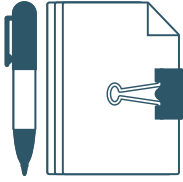


Personal Giving Values

Overview

Course Time: 2 Hours





Advance Preparation

Learning Objectives & Materials

Why this course?

Donors can make the greatest impact on the issues they care about by exploring their motivations for giving – dollars, time, skills, networks or influence – and by learning how to integrate their giving goals into other parts of their lives.

Learning Objectives

By the end of this course, participants will be able to...

1. Identify their personal giving style and evaluate their motivations
 2. Distribute philanthropic resources based on personal giving values
 3. Design a personal giving plan including time, dollars, skills, network, and influence
 4. Differentiate the ways that they can give and identify what they should consider when creating a giving plan
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Materials



Handouts

- A1. Giving Mission Statement (All Participants)
- A2. What is Your Giving Style? (All Participants)
- A2. Personal Giving Style (All Participants)
- A3. Nonprofit 1 (one copy)
- A3. Nonprofit 2 (one copy)
- A3. Nonprofit 3 (one copy)
- A3. Nonprofit 4 (one copy)
- A3. Nonprofit 5 (one copy)
- A3. Nonprofit 6 (one copy)
- A4. Deciding Where to Give (All Participants)
- A4. Personal Giving Plan (All Participants)





Advance Preparation: Learning Objectives & Materials



Other Materials

- Slide Show
- LCD Projector and Screen
- Laptop
- Index cards
- Markers
- Sticky Notes
- Flip Chart
- Pens



Welcome & Introductions

Technique: Icebreaker

20 Minutes



- Flip Chart
- Markers
- A1. Giving Mission Statement



Welcome

As participants enter the room, ask each to create a name tag for him or herself.

Once you have all (or at least most) of the participants present, welcome the participants and introduce yourself.



Where We're Heading Today

Welcome to this workshop where we will talk about personal giving values. Over the next two hours, we will walk through a series of activities and discussions to gain a better understanding of personal giving values. We'll be exposed to content designed to help you:

1. Identify your personal giving style and evaluate your motivations
2. Distribute philanthropic resources based on personal giving values
3. Design a personal giving plan that includes time, dollars, skills, network, and influence
4. Differentiate the ways that you can give and identify what they should consider when creating a giving plan

What we are going to talk about today will be personal. We are going to talk about real finances and values. It is important to be as open as you can while we have these conversations, but you are welcome to share with the group at your own level of comfort. We have a lot to talk about today. Before we get started, let's take some time to find out who is in the room.



Distribute the handout A.1 Giving Mission Statement.



Introduce Yourself

This handout has some very basic directions on a giving mission statement. Please take a few minutes to read through the directions and briefly write a giving mission statement one to three sentences long. In organizations, mission statements are used to state purpose, determine scope, identify values, and state intent. Your mission statement should similarly reflect your personal giving.

It doesn't need to be perfect, just a simple statement that articulates your goals and how you plan to achieve them.



Missing Giving Statement Example

Give participants five minutes to write their mission statement. After five minutes ask the participants to answer the following questions (you should model this first before you ask participants to turn to a partner):

1. What is your name?
2. What keeps you busy during the day?
3. What is your giving mission statement?



Participants will struggle a bit with this activity. Make sure to give them ample time to write their statement. Keep in mind, this is a first draft for them.

Thank you for sharing your mission statements. Please hang on to your statement, will be looking at this again towards the end of the session. Now that we have started talking about giving, let's talk about what you can give.

We have various reasons for giving and are charitable in different ways. What are the types of resources that can be donated?



Using a Flip Chart, write the answers that you hear.





Charitable Resources

The resources we will talk about today are time, money, skills, network, and influence.

Network and influence are similar, but there is a subtle and important difference. On the screen we have a definition of what we mean by each of those resources.

During today's session we will talk about various ways to give your resources

To help us do that, it is important to understand first what motivates us to donate our resources, and what our giving style is.



Giving Style

Technique: Style Quiz

25 Minutes



- Flip Chart
- Markers
- A2. What is your Giving Style
- A2. Personal Giving Style Quiz



Quiz Time

How many of you have taken a personality-style quiz in a magazine like Cosmopolitan? Those who have know that they are fun little quizzes meant to give you some insight on your style or behavior. These quizzes tell you in which Hogwarts house the sorting hat would put you, or what book you should be reading this fall.

Today, we are going to take a quiz to find out what your giving style is. This quiz should be thought of as a general overview of your style and motivation. It is meant to be fun, just like a Cosmo quiz. This quiz is not scientific by any stretch of the imagination, but the information you find at the end of the quiz is indeed based in scholarly articles.

Hand out A2. *What is your Giving Style* to participants. The quiz should take seven minutes to complete. Once everyone is complete, discuss scoring.

To find your giving style, we need to find your giving score. Use the second page of your handout to find your score. Add your total score at the bottom of each column. Once that is complete, we will discuss your style.

As the participants work on scoring, hand out the Giving Style sheet. Make sure everyone has time to complete scoring. Be sure to help anyone struggling with the instructions.

Hand out A2. *Personal Giving Style Quiz Results*.



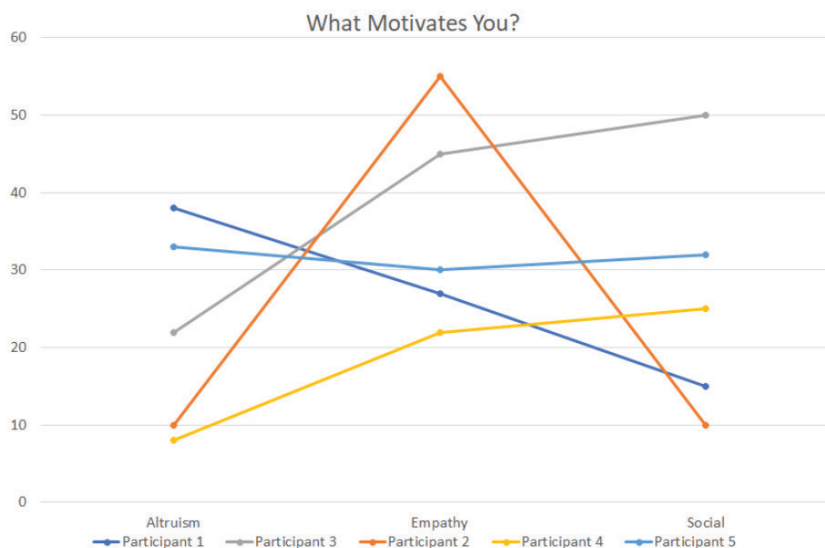
Now that we have our scores let's discuss style. I am passing around a sheet with each of your styles. Please take a few minutes to review your style along with the other styles on the sheet.

Give participants three minutes to review the giving style sheet. As they do, use a flip chart to draw a graph with **Altruism**, **Empathy**, and **Social** on the X axis and **0-60** on the Y axis in increments of 10.

That was fun! While not completely scientific, the three types of giving in this quiz are loosely based on [Rushton's altruistic](#) self report altruism scale and [Penner's subscale](#). Did anyone have the same score in more than one column? Because these are all altruistic behaviors, it is possible you are motivated in more than one way. Consider each definition applicable to your giving style. All of the traits are a spectrum of altruistic giving motivations.

If we plot this on a graph you may see some major differences in our giving motivators. In fact, it would be interesting to put this on a graph.

Have participants use different color markers to plot their results. It should look something like this.



Those of you with a bigger difference in your plot ranges may relate more toward that kind of giving. Those with a flatter line may be motivated by all types of giving.

It should be noted that these are all forms of altruistic motivators, we are not talking about other reasons to give like social status. Some lines may be fairly flat, which can show that people are motivated in several ways.



What is important here is the reflection on their own giving motivation. With that in mind, start the debrief.

Allow time for discussion. Make sure to spend at least five minutes on this conversation. You are talking about what motivates people to give and what considerations to make when regard other's giving. Make sure people have time to talk.

You need to be aware that people are coming from different perspectives and motivations.

Whether you're getting advice from a planner or talking with someone in this room or what motivates people to give of themselves at the nonprofits we're working with (remember - giving isn't just money, and the people working at these organizations are giving A LOT... and what's motivating them may be very different)

People's motivations for giving can be complex and depending on a variety of factors, people may be motivated more or less.

Once again, this quiz should be thought of like a Cosmo quiz: informational, and not perfect science. This activity was an act of self reflection. It important to think about what motivates us to give as we evaluate our personal giving values.

Why do you think it's important to have a better understanding of the motivating factors behind your giving?

Allow time for discussion.

Alright, we are all motivated to give. Now, let's work on organizing our giving.



Organize Your Giving

Techniques: Card Sort

30 Minutes



- Flip Chart,
- Markers
- Sticky Notes
- A3. Nonprofits 1-6



Organize Your Giving

Now that we have talked about what motivates us to give, let's talk about how to plan your giving so that it aligns with what motivates you. In the beginning of this module, we talked about resources we can give.

Does anyone remember what those are?

The correct answer is:

- Time
- Dollars
- Skills
- Network
- Influence

Great. Now that we know the various ways in which we can give and we've discussed some of the motivations we may have to give, let's organize our giving.



A.3 Nonprofit1-6 should be hung around the room. Whenever possible, print the nonprofit profiles on large paper for better visuals during the debrief. Participants will do a gallery walk to review the organizations.

Ask the participants to create two sets of sticky notes with the five types of resources: Time, Dollars, Skills, Network, Influence, for a total of 10 sticky notes. It will be easiest if each participant has their own color sticky notes. Once they have reviewed the organizations, ask them to distribute their resources across the organizations as they see fit.

To make the most of our gifts, it is important to be strategic. In this activity, I want you to review the needs of these six organizations by walking around the room, and then decide where to put your resources. Once you decide, place your resources - sticky notes - on the organization profile.

Give the participants 10 minutes to walk around the room and distribute their resources. Once they have placed all of the sticky notes, ask them to work in small groups to reflect on their decision making.



Giving Plan Review

Now please take some time to walk around the room and take a look at how everyone distributed their resources. Once you are done, sit down with your group and discuss why you chose to distribute your resources the way you did.

Give the groups 10 minutes to discuss in small groups. Once complete, bring the room back together with the following large group debrief.





Giving Plan Reflections

- How did having information about a variety of different organizations help you determine where to give?
- Did any of you have a difficult time making decisions?

Allow the groups five minutes to do a small group debrief. After the small group debrief, proceed to the large group debrief, in which you would make note of trends or interesting placements.

This activity was all about being more strategic about your personal giving. How do you think your giving style played into this activity?

Now that we've had a chance to take a look at a variety of organizations and think strategically about how we might give to these fictional organizations, let's bring the discussion into our real lives.



Personal Giving Plan

Techniques: Journaling

30 Minutes



- A4. Personal Giving Plan
- A4. Deciding Where to Give
- Pen



Personal Giving Plan

Distribute A4. Personal Giving Plan worksheet.

I am passing around a personal giving plan worksheet. As you work through this, think about your past giving, how you are motivated to give, how you focus your giving, the outcomes you hope to achieve, and your level of involvement. At the end of this document, you once again have an opportunity to write your giving mission statement. As you write that, think about what we have talked about today. We reflected on our giving style, talked about how we interact with others' styles of giving, and looked at distributing our own resources. Use this worksheet to reflect on what you learned about yourself and others today and then rewrite your giving mission statement.

Allow 15 minutes for participants to work on the Personal Giving Plan. They may not have all of the information they need to fill out everything. Assure them that is okay, they can bring the plan home with them and finish the information.

What were some significant changes you saw in your giving mission statement?



Facilitate discussion on changes in the statement. Changes may include:

- Awareness in giving style
- Reflection on motivation to give
- Giving intentionally



Some participants may not have major changes to their first statement. That is good too! Encourage those participants to discuss how they came up with a good statement in the first place. Also note that this statement is dynamic and it likely will change over time.

Now that we have taken a look at giving style, resource distribution, and mission statements we have a general idea of your personal giving values. Let's look at a resource that can help determine where to give.

We had an activity earlier in which you were given fairly detailed information about a variety of different organizations. Now I am handing around a document that can help you to do your own research across sectors in order to be more strategic in your own decisions. Please keep in mind that this is simply a guide. You may have other resources that help you make your giving decision.

Pass around A4. Deciding Where to Give.

Please take a few minutes to review this document.

Allow three minutes for review. Then move to the wrap-up.



Q&A / Wrap-Up / Next Steps

Techniques: Large Group Debrief

10 Minutes



Resources

During this wrap-up, you will review the intention of this course and provide additional resources for participants.

Today's session had some fun elements like the quiz, but in the end, it was really about being more intentional and strategic as you look to make the greatest impact with your giving.

What are some ways the greater awareness around your giving style or some of the questions you reflected on in your personal giving plan may impact your giving as you look to the future? Take a few minutes in small groups to discuss.

After a few minutes of small group discussion, ask a representative from each group to share what came up in their discussions.

You can make the greatest impact on the issues you care about by exploring your motivations for giving and by learning how to integrate giving goals into other parts of your life. As we worked through our session today, we hope this introduction to personal giving values started you thinking not only about personal giving but also about how it impacts your family, work, and investments.

There is a lot of information about giving practices. This training worked from many sources. Of those sources, we think [Fidelity Charitable](#) and [Charity Navigator](#) will be the most important for you to visit as a follow-up to this course.

Please take your resources with you as you leave today.



Thank You!

