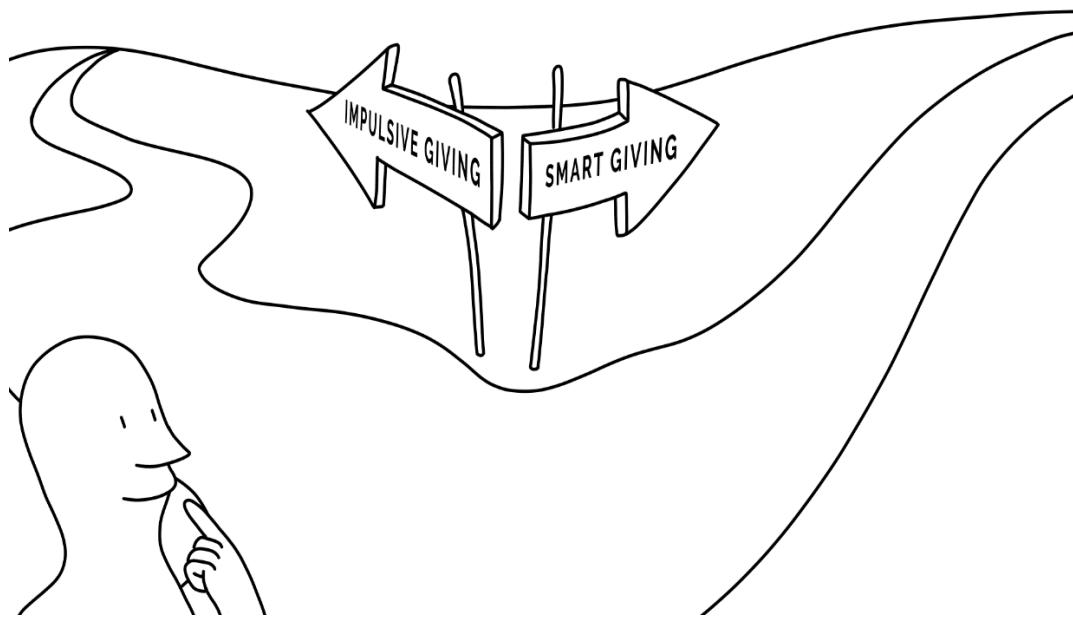


The Smart Donor Workbook



SMART DONORS
MAKE A DIFFERENCE

Worksheet for Module 1

Your Giving Roadmap

A. The 80/20 rule

Last year, the total dollar value of my charitable giving was: \$_____

My small, spontaneous gifts totaled approximately: \$_____

(Gifts under \$250 and money spent on sponsorships, "GoFundMe" requests, tickets to fundraising events, charity auctions, ad-hoc email or mail solicitations, etc.)

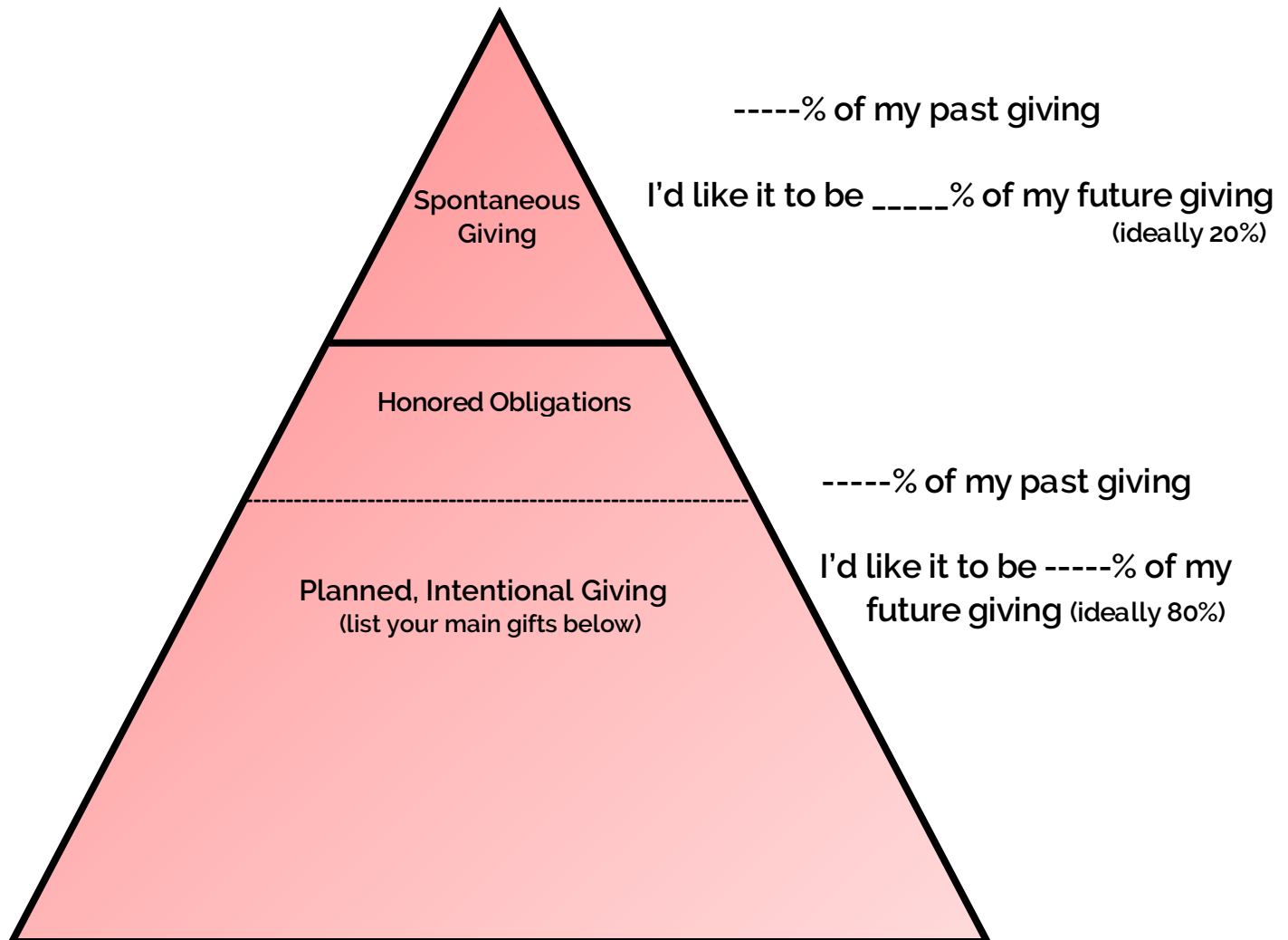
My honored obligations totaled: \$_____

(Gifts to your religious organization, alma mater and other institutions made primarily out of a sense of obligation – you may not have these)

My planned, intentional gifts totaled: \$_____

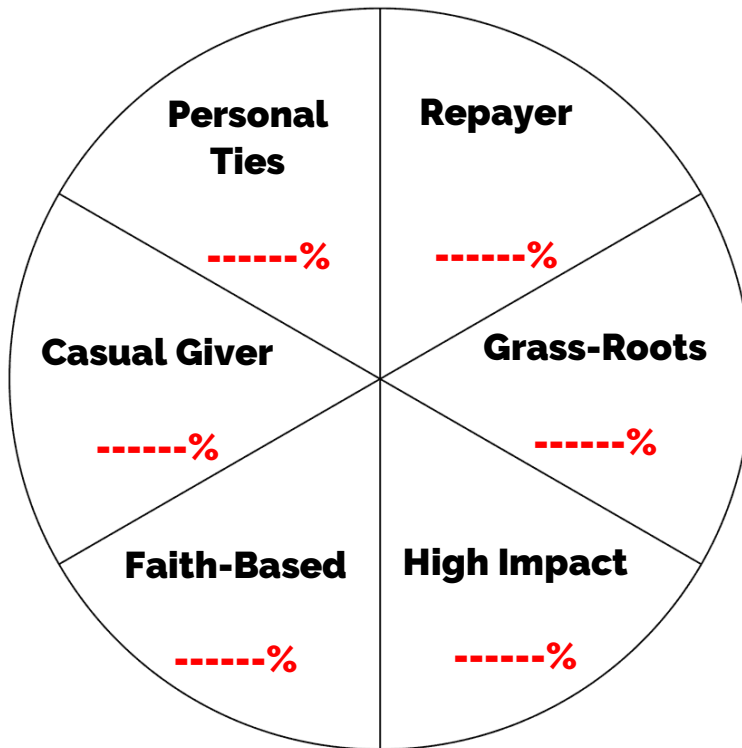
(Any gift that was planned ahead and purposeful, rather than only made out of a sense of obligation)

How close to the 80/20 rule are you now? What could you change in the future?



B. What sort of donor am I?

Fill in the percentages that best describe your style of giving last year – everyone is a mix!



Repayer: I supported organizations that had an impact on me or a loved one (alma mater, hospital, summer camp, hospice...)

Casual Giver: I gave to well-known charities (because it isn't very complicated)

Faith-Based: I gave to my place of religion or only to organizations that fit with my religious beliefs

Grass-Roots: I gave to local charities or to small organizations where I felt my gift made a bigger difference

Personal Ties: I gave to organization run by people I know or when I was asked to give by family or friends

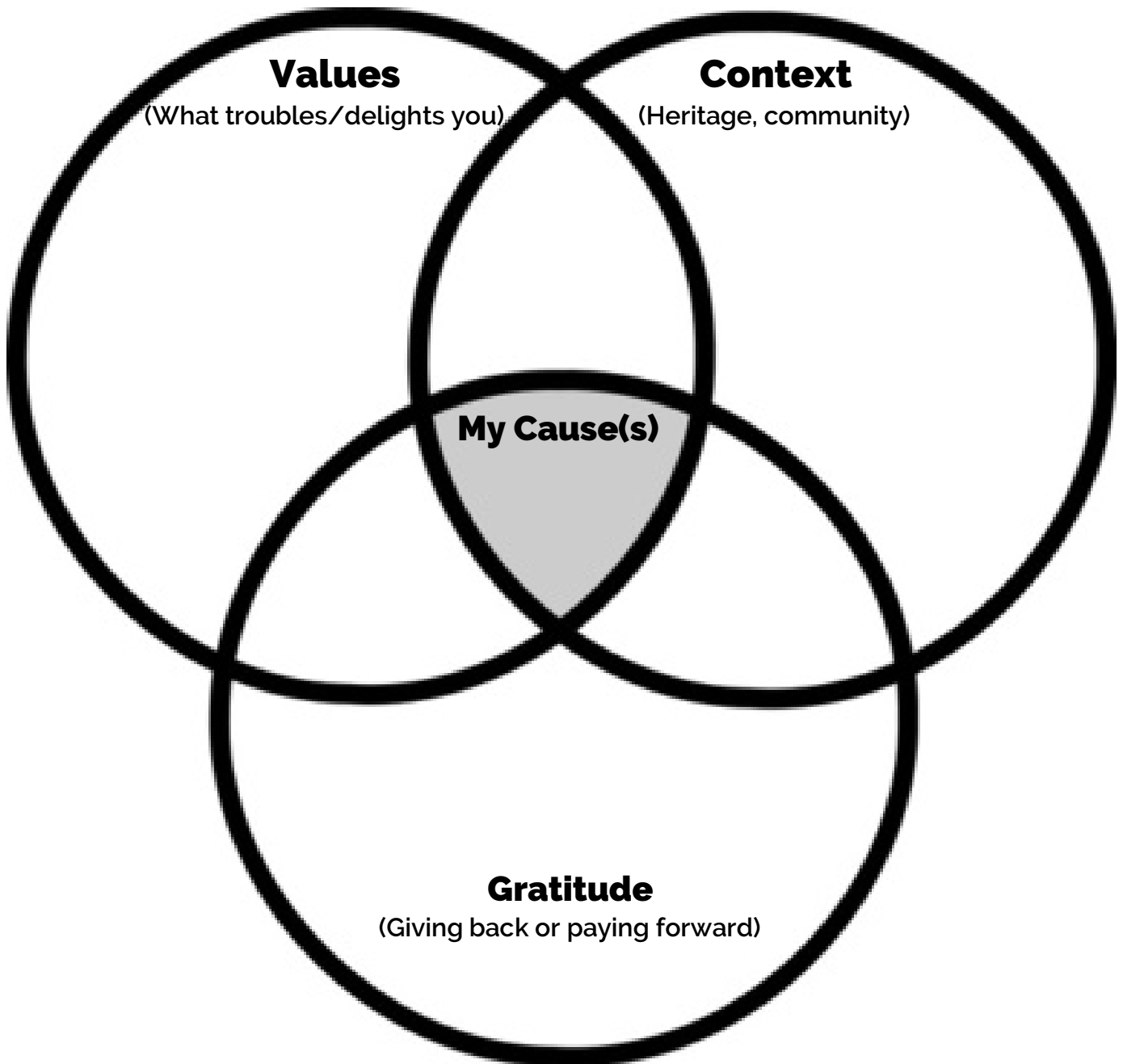
High Impact: I supported overlooked causes, I gave to organizations I felt were doing the most good.

Worksheet for Module 2

What Interests You? Choose your cause(s) and issue area(s)

A. Your Venn Diagram

Fill in the circles. What overlaps do you see?



B. Applying scale, solvability and neglectedness criteria to your chosen issue area

My Chosen Cause(s) _____

Ranking the issue(s) I care about within my chosen cause(s)

(Give a score between 1 and 5, with 5 being the highest)

Issue	Scale	SCORES	
		Solvability	Neglectedness
TOTAL			

Scale – How much good will result from solving this issue?

Solvability – What are the chances of success?

Neglectedness – How many resources are already being deployed?

So I will focus on _____

Worksheet for Module 3

Why is it happening? What Pathways to Change should you support?

A. Understanding your chosen issue within its ecosystem

Fill in this chart based on your knowledge and basic research about your chosen issue

Symptoms	
Root causes	
Possible intervention points	

B. Drawing a landscape map

Use this template to identify the players, stakeholders and outside influences in your chosen issue's ecosystem. Not all these categories will apply to your chosen issue area! Just ignore those that are not relevant... Reflect on the important relationships between the various players. **Then draw your own landscape map on the following page.**



My Landscape Map

Based on this landscape map, I am going to support the following solutions to my chosen issue(s):

Worksheet for Module 4

How to make change? What are the pathways to change?

Please fill out the following statement:

I wish to support organizations that engage in....

Rank each pathway to change from 1 to 5 (5 is highest)

SCORE

	SCORE
Responding to immediate needs	
Long term community-based solutions	
Grassroots programs	
Top down programs (research or model building)	
Policy based solutions – Advocacy	
Media and communications campaigns	
Impact investing	
Harnessing market forces for social good	
Capacity building	

Based on the solutions you identified in Module 3 and on the pathways to change that listed in the chart above, you are ready to develop a shortlist....

But first, watch Module 5 to learn about the American charitable sector.

Worksheet for Module 6

Measurement and Evaluation

Step 1: My Theory of Change

I would like to see this happen:

(Describe the **impact** you would like to see achieved)

Based on the gaps and leverage points I found mapping my issue in **Module 3**, and thinking about pathways to change in **Module 4**, I believe the following steps are needed to achieve this goal:

Ultimate **outcome**

Example: Positive change in the lives of vulnerable children and their families



This will happen if....

Intermediate **outcome**

Example: families become more resilient through improved health and saving money by eating less outside the home



This will happen if....

Intermediate **outcome**

Example: People have resources to feed their families more nutritious food at home



This will happen if...

Activity

Example: We teach low income households to efficiently cook meals from scratch using healthy, affordable ingredients

Step 2: My Shortlist

Name	Notes
A.	
B.	
C.	
D.	

Step 3: Who is achieving success?

Please score these criteria from 1 to 5 (5 is highest).

TEST 1

Criteria

Names on my Short List	1	2	3	4	5	Total
A.						
B.						
C.						
D.						

Criteria

- 1** – Has the charity clearly defined success?
- 2** – Is it measuring the right things?
- 3** – Is it evaluating its data properly?
- 4** – Is it learning from the findings?
- 5** – Is it clearly communicating results to donors?

The highest score for Test 1 is _____

Worksheet for Module 7

Who is making the most difference? Finalizing your selection

A. Are those central to the problems closest to their solutions?

Please attribute a score from 1 to 5 (5 is highest) to answer the question:

“Are all programs based on the input and feedback of the people being served?”

Test 2

My Short List	Score
A.	
B.	
C.	
D.	

Note: Some smaller charities do a great job listening to the voices of those they seek to help but fail to communicate this to outside audiences. If such a charity is on your shortlist, attribute your score based on your personal knowledge.

The highest score for Test 2 is: _____

Before continuing, please watch the two virtual site visits.

Virtual Site Visits

1. "Watershed Management – The Case of the Confusing Names"

The Urban Organization

The story: Restoring an urban river revitalized an entire neighborhood

Mission: To support and promote the continued restoration and preservation of 19 miles of river and 50 square miles of land as environmental, cultural and economic asset.

Programs: Environmental and Science Education, Bike safety programs, Water Quality Monitoring and Fish Health, Recreation Programs

Staff and Budget: 11 staff, \$1.2 million budget (60% government, 30% private foundations, 10% individuals -most give under \$250). CEO present for 11 years.

The Rural Organization

The Story: 14 towns were united to preserve a pristine watershed

Mission: To preserve and protect the 300 square miles and seven rivers of the Wood-Pawcatucket Watershed for our natural and human communities

Programs: Educating and informing (residents, visitors, public officials), Rehabilitation and Resiliency (wetlands restoration, water quality monitoring)

Staff and Budget: 2 staff, \$25,000 budget (45% government funding, 30% private foundations, 25% individuals (a membership is \$35). CEO present for 11 years.

2. "Large, Medium, Small – Supporting Heart Health"

Large: The American Heart Association - \$933 million

Medium: South County Hospital (Cardiopulmonary Rehabilitation Center) - \$1.3 million

Small: Healthy Bodies Healthy Minds (Obesity Prevention and Education) - \$600,000

B. Selecting a high performing organization

Please attribute a score from 1 to 5 (5 is highest)

Test 3

My Short List of Charities

	A	B	C	D
Measuring Success				
What does success mean to the organization?				
Is it measuring impact?				
Is it differentiating between outputs and outcomes?				
Is its theory of change properly articulated?				
Planning for the Future				
Are future plans aligned with the mission?				
Organizational Strength				
Do you feel the organization is strong?				
With good community support?				
Does it recognize and seek to solve its weaknesses?				
Funding				
Is the funding stable?				
Is there a wide base of donors?				
Do donors appear to be engaged?				
Is board active in fundraising?				
TOTAL				

The charity with the highest score is: _____

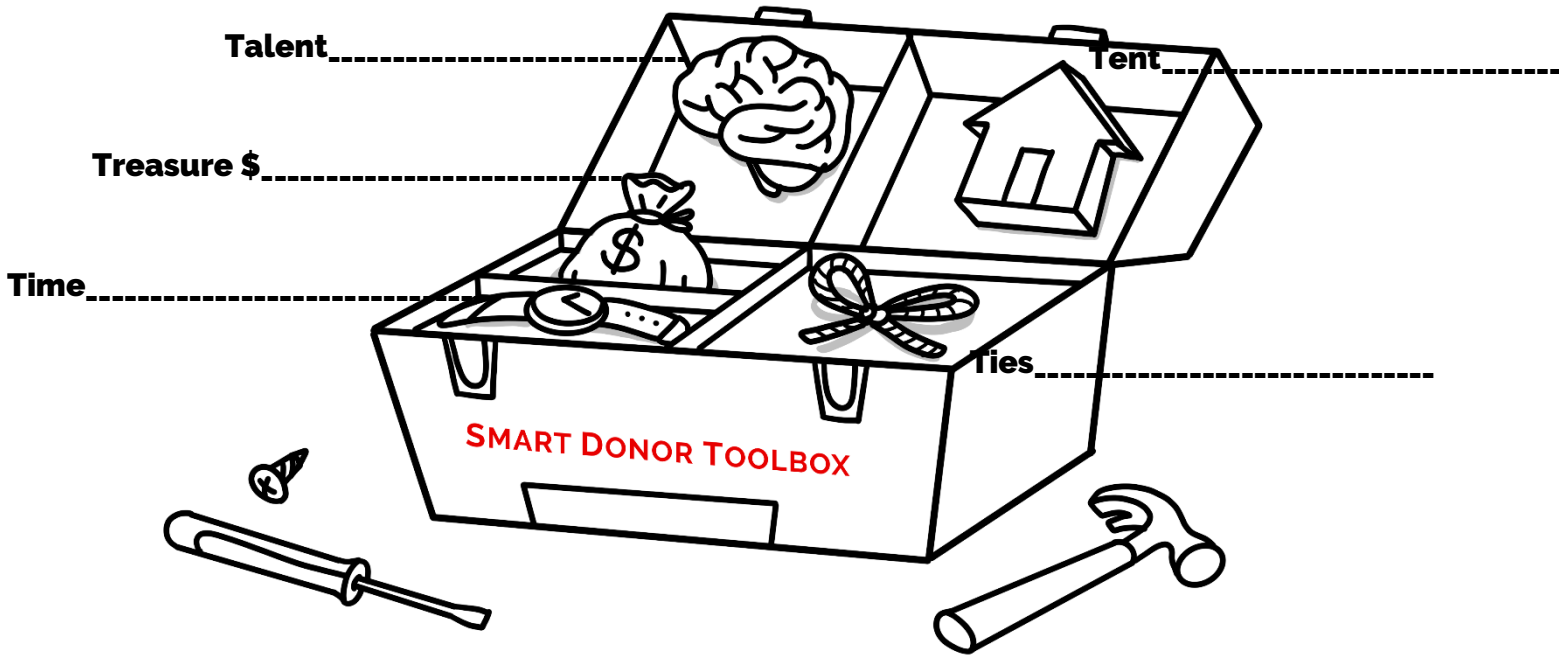
Total Score:

My Short List of Charities	Test 1	Test 2	Test 3	TOTAL

My final selection is _____

My Engagement

Fill in your Smart Donor Toolbox



My financial support will go towards:

___% to General Operating Support

___% to Capacity Building

___% to one or more specific programs_____

___% to a capital campaign or building endowment

In the future, I hope to see the following:

	After one year	After three years
Outputs		
Outcomes		
Impact		

Vocab Alerts from the Modules

501(C)3 – An entity granted tax-exempt status by the IRS because it furthers a social cause and provides a public benefit.

Activities – Processes or events needed to carry out a program (what must be done to achieve intended results)

Collective Impact Approach – Tackling complex problems to foster systemic changes and population-level outcomes

Community Foundation – A grantmaking organization dedicated to improving the lives of people in a defined local geographic area

Donor Advised Fund – An investment account administered by a public charity

Giving Circle – A group of donors who pool their money, learn together about a cause, and decide collectively how the money will be donated

Impact – A significant positive change that addresses a pressing social or environmental challenge (over and above what would have happened without intervention)

Mission – Why an organization exists (goal of its operations, services it provides, primary customers, geography)

Outcomes – Benefits for participants during and after the program (difference the program makes)

Outputs – Units of service or products (how much is done for how many people)

Private Foundation – A charitable organization set up by individuals or families to accumulate capital in a tax efficient manner, then deploy it for charitable purposes

Qualitative Data – Approximates or characterizes but does not measure

Quantitative Data – Expresses a certain quantity, amount or range (Qualitative data describes whereas quantitative data defines)

Theory of Change – How change can or will occur in a particular context

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