



A PERSONAL WORKBOOK

Your pathway to thoughtful giving and philanthropy.

“It is more difficult to give money away intelligently than it is to earn it in the first place”

Andrew Carnegie, American Philanthropist

The actions of local people can truly transform lives, but we do know that it can be really hard for individuals to give well into communities.

Every person has a giving journey

Every person has a giving journey, which usually starts with giving to what they know, or to what they, or the people close to them, have experienced. Over time this can change, we see many instances where people who draw closer to their communities can shift their perspectives, and this can lead to more thoughtful and informed giving. It's a fulfilling shift that can change people, and it can certainly change communities.

The philanthropic landscape is always evolving, so it's important to nurture your natural curiosity and adopt a learning mindset, which will empower your practice for more effective giving.





Your giving workbook

We have created this giving workbook to help you to explore the journey of thoughtful and informed giving. The journey will involve investigating your passions, your values, your options for giving into your community and areas of interest.

However you decide to express your giving is going to be personal to you, and we hope that the process you are about to work through will help you to make it even more meaningful and impactful, as well.

Whether you are simply learning about the work of Clutha Foundation or are ready to take the next step to establish your own fund, the guidance of this workbook will help you to reflect deeply upon why you give and help you to embark on a pathway of thoughtful and informed giving into your community.

Please note this workbook can be kept private to help you sharpen your focus, or it can be a lasting resource for Clutha Foundation, so that their staff and local trustees can represent your interests long into the future. You may also want those impacted by your giving to know more about you, or you could choose to remain completely anonymous; whatever you choose to do, we are honoured to be on this journey with you.

Your giving story

Every person has a unique giving story. Reflecting on your story to date by using this workbook, can help you reflect on your motivations for giving and help you create a roadmap for your future impact. It can also serve as a way for successive generations to understand your intentions.

This process, and the concept of giving for the very long term, may even influence the way that you think about structuring your giving.

The process of working through this workbook may help you to:

- Live your life more intentionally.
- Clarify what is important to you and your family.
- Ensure your wishes are understood and appropriately represented throughout generations.
- Provide a foundation for financial planning and life transition.
- Enhance your family relationships.
- Inspire intergenerational involvement.
- Provide a cherished community gift and a way to be remembered for family and future generations.

Anything you write in the following pages is yours to keep, and can remain completely confidential if you wish, so please write freely.

When you have completed the exercises, you will have the opportunity to choose how much or how little is shared with family members and/or Clutha Foundation.

Your legacy journey need not stop at the end of this workbook. If you are interested in exploring further, Clutha Foundation advisors are available to discuss and guide your giving into the future.



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Share your story

These important details of your life will help to guide your giving plans as well as assist our advisors to help identify your interests and your pathways for giving.

Title:

Full name:

Address:

Date of Birth:

Birthplace:

If you weren't born or raised locally, what brought you here?

Other places you've lived:

Parent's names:

Educational institution and courses (secondary/tertiary):

Career fields:

Memberships:

Religious affiliations:

Children's names and DOBs:

Personal interests (hobbies, cultural interests, other activities)

Start your giving journey.

Have you ever stepped back and analysed your giving history?

Yes

No

We would like to help you to explore your giving and reasons you choose to donate to great causes.

What inspires you to give?

Have you given your time/been a volunteer for a local cause? If yes, why?

Where do you currently focus your giving?

Take a moment to think about how you’ve given in recent years. List the organisations you have supported in the past 5 years and why:

| Organisation | Reason for support | Frequency | Impact area |
|----------------|---------------------------|-----------|---------------|
| Local foodbank | Local poverty concerns me | Annually | Food security |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Which giving experience do you think gave you the most fulfilment? Why?

Which giving experience do you think gave you the least satisfaction? Why?

Live your meaningful life.

We would like to help you realise the power of your giving and the possibilities to change your local community. Take time to reflect on the issues that matter most to you.

The most fulfilling giving experiences often stem from causes that deeply resonate with your values.

Do you want to affect change in your local community and find it hard to know where to start?

Yes

No

If you could solve a problem, what would it be?

Have you seen an opportunity that is underfunded, or ignored?


If you were to accomplish one thing with your giving, which would become your legacy, what would that be?

Rather than specific charities, what broader cause areas are you interested in supporting (for example: giving to support education, the environment, or to tackle inequality)?

Broad cause areas are listed in the section “identify your areas of interest”

Does your giving align with your interests or concerns?

Any further thoughts?

A photograph of two people riding horses on a sandy beach. They are seen from behind, moving away from the camera towards a large, grassy cliff in the distance. The sky is overcast and grey. The person on the left is wearing a dark jacket and a wide-brimmed hat, riding a light brown horse. The person on the right is wearing a dark jacket and a helmet, riding a dark brown horse. The beach is wide and sandy, with some dark patches of seaweed or rocks visible in the foreground.

Picture your legacy.

How do you want to be remembered?

What do you want your community to remember about you?

What do you want your family and loved ones to remember about you?

Consider your values

Values are fundamental beliefs that guide people in determining what is important to them, and personal values often guide how people give. From the list below, indicate the values that resonate with you and add any others you think of at the end.

Authenticity

Acceptance

Acknowledgement

Collaboration

Commitment

Community

Compassion

Culture

Dignity

Diversity

Equality

Fairness

Faith

Generosity

Healing

Humility

Inclusion

Innovation

Integrity

Justice

Kindness

Learning

Loyalty

Reputation

Respect

Responsibility

Security

Self-reliance

Service

Spirituality

Tolerance

Truth

Other(s): did we miss any?

Giving categories and cause areas

You also may prefer to consider your priority areas in the following categories – mark those that are of interest to you:

ANIMALS & ECOSYSTEMS

Animal welfare & protection

Native wildlife protection/conservation

ARTS & CULTURE

Cultural preservation

Historical preservation

Literature

Performance

Visual arts

CIVIL RIGHTS & ADVOCACY

Strengthening civil society

Advancing equality

Progressing social justice

Government advocacy

COMMUNITY IMPROVEMENT

Strengthening neighbourhoods

Prevention of crime

Enhancing public spaces

EMERGENCY PREPAREDNESS & RELIEF

Preparing for emergencies

Creating resilient communities

DISEASES, DISORDERS & MEDICINE

Medical research

EDUCATION

Preschool and early years

Primary & Secondary

Tertiary Education

Scholarships

EMPLOYMENT

Job training & placement

Vocational counselling

ENVIRONMENTAL

Protecting native flora and fauna

Recycling

Natural resources & conservation

Sustainable environments

**FAITH-BASED
ORGANISATIONS
& RELIGION**

Honouring religious values

**FINANCIAL
LITERACY**

Budgeting services

Financial literacy

**FOOD,
AGRICULTURE &
NUTRITION**

Educational programmes

Foodbanks

Food security

**HEALTH &
WELLNESS**

Disabilities

Healthcare delivery

Mental health and wellbeing

Substance abuse

**HOUSING &
SHELTER**

Access and affordability

Homeless shelters

Senior support

**HUMAN
SERVICES**

Senior/age concern

Domestic and sexual harm

Children, youth & family services

TE AO MĀORI

Cultural knowledge

Cultural preservation

Supporting Māori aspirations to thrive

VOLUNTEERISM

Developing strong volunteer networks

**YOUTH
DEVELOPMENT**

Transition from school to work

Youth health and wellbeing services

**DID WE FORGET
ANYTHING?**

Write in any additional areas of interest here:

Identify your areas of interest.

The UN Sustainable Development Goals provide a useful framework when you are considering areas of interest that you want to affect with your giving.

Consider the 17 goals that have been identified to create a more sustainable world.

Which one(s) resonate with you?

Tick the goals that instantly draw you in (as many as you like):

1 NO POVERTY



2 ZERO HUNGER



3 GOOD HEALTH AND WELL-BEING



4 QUALITY EDUCATION



5 GENDER EQUALITY



6 CLEAN WATER AND SANITATION



7 AFFORDABLE AND CLEAN ENERGY



8 DECENT WORK AND ECONOMIC GROWTH



9 INDUSTRY, INNOVATION AND INFRASTRUCTURE



10 REDUCED INEQUALITIES



11 SUSTAINABLE CITIES AND COMMUNITIES



12 RESPONSIBLE CONSUMPTION AND PRODUCTION



13 CLIMATE ACTION



14 LIFE BELOW WATER



15 LIFE ON LAND



16 PEACE, JUSTICE AND STRONG INSTITUTIONS



17 PARTNERSHIPS FOR THE GOALS



Visit sdgs.un.org/goals for descriptions of each UN Sustainable Development Goal.

SDG interest can be an indicator for meaningful giving. Below are some examples of how broad SDG areas can drill down into impactful giving. Each community is different, and your local community foundation will be able to guide you, informing who is doing impactful work locally in your area of interest.

How do you use the SDGs as a framework? It can be as simple as the following
(note these are simplistic examples only):

2 ZERO HUNGER



Supporting zero hunger

Consider support for food security including food rescue/ community gardens/ school lunch programmes.

4 QUALITY EDUCATION



Quality education

Consider support for reading programmes/tertiary scholarships/financial literacy programmes/digital access.

5 GENDER EQUALITY



Gender equity

Consider support for LGBTQ groups/initiatives that support women and girls/women's giving circles and wider advocacy.

10 REDUCED INEQUALITIES



Reduced inequalities

Consider support for refugee groups/disability initiatives/ Pasifika led and Kaupapa Māori.

11 SUSTAINABLE CITIES AND COMMUNITIES



Sustainable cities and communities

Consider support for affordable housing/emergency preparedness/enhancing civic spaces/sustainable transport options.

13 CLIMATE ACTION



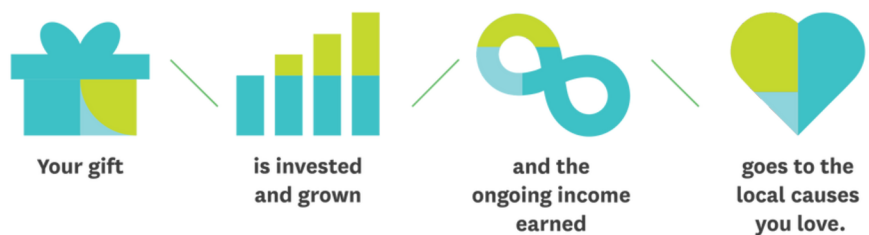
Climate action

Consider support for local environmental groups/zero waste/advocacy/Kaupapa Māori-led solutions

Local action for global goals is a powerful way to think about how you play your part in creating a thriving and more sustainable world.

Understanding giving in perpetuity.

One of the unique aspects of giving through Clutha Foundation is that you can set up a fund to give in perpetuity.

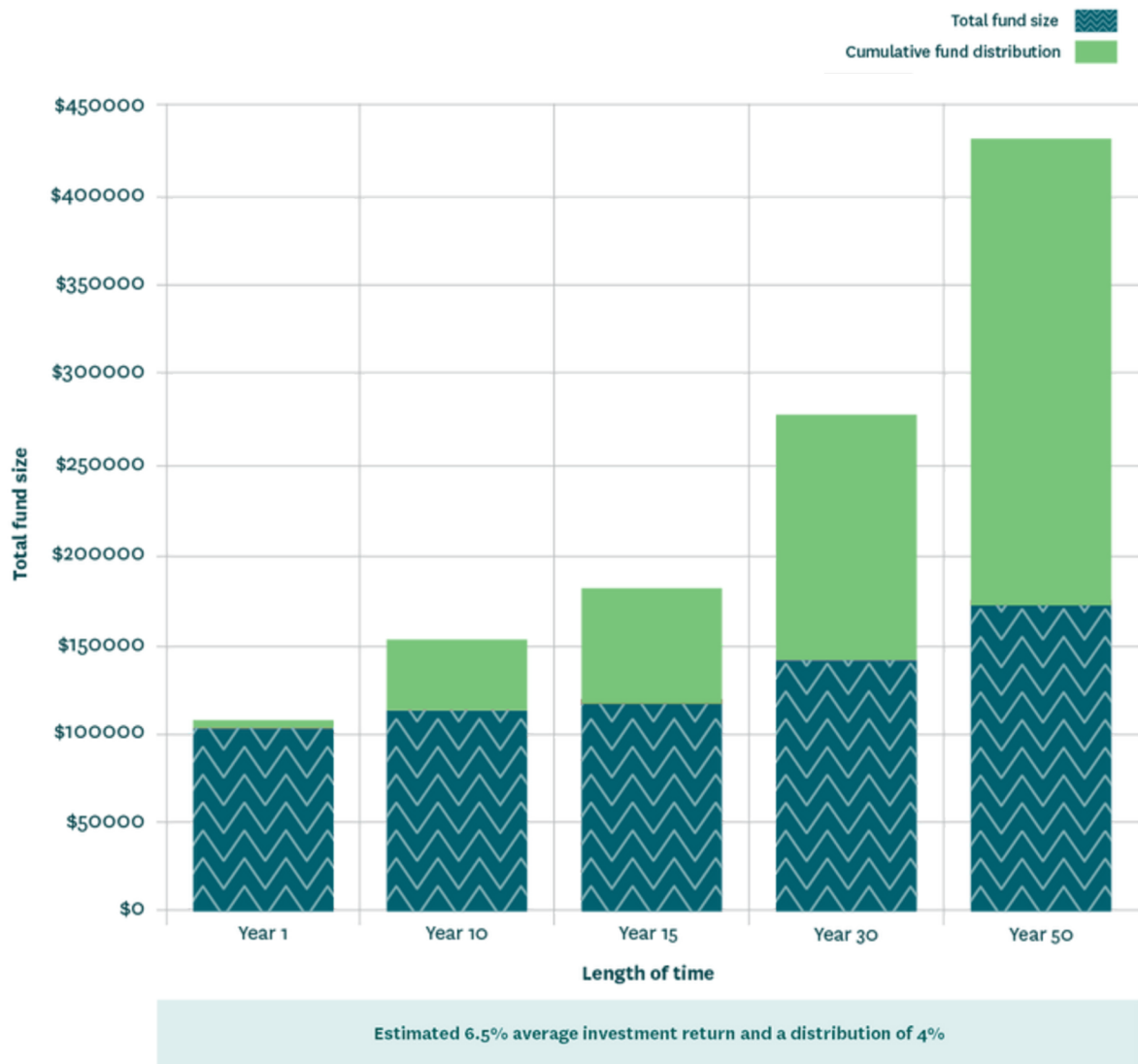


Most people have never considered giving in this way, when you give in perpetuity your gift is professionally invested. The income earned will be paid out to cause areas of your choice each and every year, forever.

It's a great way to support your community for the long term. You can set up your own fund through your local community foundation. See how an endowment fund works at communityfoundations.org.nz/fund-calculator



Below is an example of how an endowment fund gifts and grows over its first 50 years:



There's no doubt that giving in perpetuity can influence how you decide to give. If you decide to explore an endowment fund, remember that this fund will exist forever. To ensure that your giving remains relevant for the long term consider giving to broader categories rather than to specific charities.

Setting your giving guidelines.

You've identified some of your interest areas, and considered what giving in perpetuity can look like. **Now consider some other key guidelines for your giving:**

Do you want to spend time devoted to learning and managing your giving?

Yes

No

Do you want to involve your children or other family members in defining areas of interest and supporting your goals? If so, who?

Yes

No

How long do you want your giving to continue? (*years, decades, beyond your lifetime?*)

Are you interested exploring the potential of an invested endowment fund, so your giving can continue on in perpetuity?

Yes

No

Can you achieve your vision alone or would more minds and funds be beneficial? Would you consider sharing your giving journey with like-minded peers?

As well as your individual interest area(s) would you be interested in supporting a general impact fund that will always address areas - identified by data and insight - as a community priority?

Yes

No

Do you wish to focus your giving locally or are you interested in looking further afield to the wider landscape of Aotearoa NZ?

Are you interested in knowing more about

Mark those that apply:



Setting up your own fund?



Leaving a gift in your will?



Supporting cause areas rather than specific charities?



Claiming 33.3% tax back on your giving during your lifetime?

Finally, create your mission statement.

After you've completed these giving exercises, look back at your responses. This will help to develop a personal mission statement that details your goals and giving preferences.

If you like, you can work through and refine this personal mission statement with your local Clutha Foundation advisor.

I/we would like to focus on the following areas for giving:

Some guidelines or thoughts around this might include:

For example, I want to give through a gift in my will; I'd like to give for the long term through an invested endowment fund; I'd like to utilise local insight and expertise to help guide my giving; I'd like to involve my children in my giving plans.

Congratulations – you have thought through some of the core concepts behind your giving plan.

We hope the exercises in this workbook were helpful along the way. Now that you have completed this exploration of your giving interests and thought a bit deeper about your goals, you can contact your Clutha Foundation advisor, who can help you turn your aspirations into reality.

If you wish, you can share this workbook with your advisor, to help guide the conversation, and define your areas of interest.

Finally, please share your giving plans with your loved ones, so that they understand your wishes, both now and long into the future.

Giving thoughtfully will be one of the most fulfilling things you ever do. There is something really powerful about giving well into communities – it changes people, and it can certainly change communities.

Contact us to discuss your giving plan.



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