

# Your how-to-give guide: the Perpetual/Stanford Philanthropy Toolkit

By Perpetual Private Insights

18 October 2021



“Life doesn’t come with an instruction manual.” Or so the saying goes.

But while life doesn’t come with a how-to guide, the good news is that philanthropy now does.

The Philanthropy Toolkit – developed by Perpetual and the team at Stanford University’s Centre on Philanthropy and Civil Society (Stanford PACS) for Australian audiences - is your philanthropy instruction manual. It’s a how-to-give guide - whether you’re thinking about giving for the first time or have had a charitable foundation for years but want to be sure it’s having maximum impact.

The new Perpetual/Stanford Philanthropy Toolkit provides the perfect link between head and heart, the two elements of philanthropy that many community-minded, high-net-worth individuals are seeking to harmonise.

“We work with lots of clients with a real passion to do good,” says Perpetual’s National Manager, Philanthropy and Non Profit Services, Jane Magor. “They’ve worked hard, been careful with their money and believe they’ve had their share of good fortune. Their heart says it’s time to give something back. But they’re also intelligent people who want to make sure they give in a focused and effective way. Who want to make sure they’re doing philanthropy that *works*.”

The Perpetual/Stanford Philanthropy Toolkit closes that loop, addressing all the big philanthropy questions in a wide-ranging but practical fashion. Simple tools like checklists and discussion guides provide a structured way for individual and families to think through – and act - on their philanthropic aims. Delivering philanthropy that comes from the heart **and** puts the mind to work on making an impact.

Perpetual Private’s Caitriona Fay was deeply involved in the development of the Australian version of the Philanthropy Toolkit. Here’s her introduction to the toolkit - who it’s for, what it does and how it helps.

## Doing philanthropy better

So how do you use the toolkit most effectively?

- You can work through the whole toolkit – all six sections– for a complete and comprehensive guide to how think about – and act – on your philanthropy
- Or dive into the sections that speak to the issues you’re concerned about – whether that’s family philanthropy or how to track the effectiveness of your giving (see the boxed section below).

## Call in the experts

The other way to use the toolkit is to bring an expert adviser into the mix. The toolkit is designed for self-starter philanthropists – but also for use by an adviser collaborating with individuals, couples and families. They can facilitate discussion and debate and then enact philanthropy decisions that deliver maximum impact, but also take account of a full range of other factors – your succession planning, financial planning, tax situation and much more.

## What to do now?

- Talk to your existing adviser about using the Philanthropy Toolkit to optimise your philanthropy. If they don't have the toolkit, you can **download another copy** from the link below and share the toolkit with them.
- Reach out to Perpetual via the contact form below. We'll put you in touch with a Perpetual philanthropy adviser who's an expert in giving practices - someone who's been trained to use the toolkit with individuals and families just like yours.

## [Get the Toolkit](#)

## Go where you need to go

The Perpetual/Stanford Philanthropy Toolkit's modular design means you can jump to the section that will help you the most. Here's a sampler:

- There are many elements involved in deciding which organisations to support. The guide in Section Five helps you assess organisations on **how** they address social problems.
- Want a broader view of that selection process? The due diligence worksheet (also Section Five) is a comprehensive framework you can use to assess the quality of NFPs you're thinking of supporting.
- Working through the toolkit with a trusted adviser can make managing your philanthropy easier and more effective. Turn to Section Two of the kit to see how your advisor can work with you.

Perpetual Private's Caitriona Fay was deeply involved in the development of the Australian version of the Philanthropy Toolkit..

# Want guidance on making your philanthropy more effective and rewarding?

Get in touch with our philanthropy specialists via 1800 631 381, [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) or by submitting the form below.

Contact us

Perpetual Private advice and services and Perpetual's Philanthropic Services are provided by Perpetual Trustee Company Limited (PTCo), ABN 42 000 001 007, AFSL 236643. This information has been prepared by PTCo and contains general information only and is not intended to provide you with advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. The information is believed to be accurate at the time of compilation and is provided by PTCo in good faith. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. No company in the Perpetual Group (Perpetual Limited ABN 86 000 431 827 and its subsidiaries) guarantees the performance of any fund or the return of an investor's capital. Past performance is not indicative of future performance. This publication may contain information contributed by third parties. PTCo does not warrant the accuracy or completeness of any wording in this brochure which was contributed by a third party. Any views expressed in this brochure are opinions of the author at the time of writing and do not constitute a recommendation to act.