



### **Milestones for Effective Impact**

*"If you can't fly then run, if you can't run then walk, if you can't walk then crawl, but whatever you do you have to keep moving forward." -Martin Luther King Jr.*

We encourage all participants in the Social Impact Sprint or Impact Investing Education Series to select 1-2 milestones in each area (Personal & Household Finance, Personal Priorities, Lending/Investing/Donating, Volunteerism, and Personal Balance), and commit to accomplish them by the end of the 6 learning sessions, (~1/ week or so), and no more than a total of 12 (2/week).

We do not encourage participants to select goals that will create an undue sense of overwhelm, or create stress, burnout or hardship on the individual or family, but to work from within what you can do and what you do have, to contribute to the personal priorities that mean the most for you.

#### **Personal & Household Finance**

Create a basic annual household budget

Set up an annual savings plan for your household

Set up an annual debt management plan for your household

Discuss your household budget as a family and review 1-3 annual financial goals

Decide how much time you have available on a weekly budget for professional commitments, including employment, volunteer service, educational efforts, events & conferences,

Create a basic "giving plan" for the next 12 months, including budgeting for the resources, capital, time, and energy you have to offer in humanitarian and impact investing objectives.

Meet with an accountant or financial advisor to discuss and update your household financial plans for the coming year

Other: \_\_\_\_\_

#### **Personal Priorities**

Complete the Personal Priorities tab on the Annual Giving Allocation

Write 1-2 pages in a journal about the humanitarian initiatives, projects, and causes that are most meaningful to you

Reflect on the organizations and institutions that have contributed the most to you throughout your life, then send a thank you note, donation, or other way to "give back" as thanks

Identify your most unique, valuable, or helpful set of skills, experiences, resources, and interests

Find 1-3 organizations who would most benefit from the skills, experiences, resources, and interests you have to offer

Decide "what the bottom line is" for you as a volunteer, humanitarian or impact investor, and create a personal slogan based around this outcome for example, the Gates Foundation mission statement, that "All lives have equal value".

Complete the Gates Foundation challenge "If you were to create a foundation, what causes and organizations would it support?

Other: \_\_\_\_\_



### **Lending, Investing, Donating**

- Buy a goat or other equipment through Mercy Corps or another NGO
- Make a loan on Kiva or Kiva Zip
- Find a new local nonprofit to support in the Willamette Give!Guide! or Charity Navigator, and make a \$50+ donation
- Make a crowdfunding "investment" on Kickstarter, Start Some Good, IndieGoGo, or another platform
- Make a friends & family investment in the \$1K-\$10K range
- Make a syndicated or personal angel investment in the \$25K-\$500K range
- Make an impact venture capital investment in the \$1MM+ range
- Promote a fundraising event for a cause or organization you are involved with, through email, social media, and word of mouth
- Set a personal fundraising goal for a cause or organization you are involved with, and successfully accomplish or exceed this goal
- Attend a fundraiser for a cause or organization you are involved with, and make a personal financial contribution at any level
- Other: \_\_\_\_\_

### **Volunteerism**

- Decide how much time you have available for volunteerism this year
- Evaluate your current volunteer commitments and decide if there any changes you wish to make
- Reengage with your volunteer organizations from last year about how to contribute this year
- Explore new volunteer opportunities use the Willamette Give!Guide! or Charity Navigator as a guide
- Make some introductions to people that you think will benefit the organizations you support
- Visit a nonprofit you support and provide words of encouragement to the organizing team
- Sign up for an advisory or board relationship
- Recruit a new volunteer for an organization you believe in
- Other: \_\_\_\_\_

### **Education & Industry Awareness**

- Read Philanthrocapitalism, Designing for Behavior Change, or other book about impact topics
- Watch ten 2-5 minute videos about social impact initiatives
- Attend an educational workshop on an industry topic
- Sign up for a program or course on an industry topic
- Tour the Gates Foundation Visitor Center or Mercy Corps Action Center
- Attend an industry conference (SoCAP, Tech4Change, Startup Weekend, SXSW, Hacking Social Impact, etc.)
- Attend an investment competition or other investment event (Angel Oregon, Keiretsu Forum, SVP Fast Pitch, Bend Venture Conference, Willamette Angel Conference, New Venture Challenge, etc.)
- Participate as a mentor, judge, or speaker at an industry event or conference
- Other: \_\_\_\_\_



**Personal Balance**

Sign up for a gym pass, workout class or athletic activity

Take an entire day or weekend away from work

Take the Burnout Quiz: <http://www.mindtools.com/stress/Brn/BurnoutSelfTest.htm>

Get a massage or other wellness activity

Spend an afternoon with family & friends

Schedule a session with a life coach, therapist or spiritual leader

Spend the day in nature a hike in the forest, walk beach on the Coast, kayaking, biking, skiing, etc.

Take a long nap and rest up!

Set the autoresponder on your email inbox and unplug from technology for the weekend

Other: \_\_\_\_\_