



**GIVING BACK FOR YOUNG PROFESSIONALS**

**Your Personal Inventory Worksheet**



**GIVINGISSOCIAL.COM**

## I. TIME

*Goal: To identify how much FREE TIME you can give away.*

### Instructions:

1. Recall all your various activities that comprise the “General Activities” here. Then note them under each General Activity so you know all the time requirements to include later on. Each type of General Activity will differ from one person to another. For example, “Meals” for me is 5 times a day, and 3 big meals for others. “Family” is time spent with my children which includes sending them to school, bathing them, and time with my spouse which includes our dates and quality time together. For single people, it might be time spent with parents and siblings.
2. Write down all your other life activities that I’ve missed and put them under the “Others” rows.
3. Identify the amount of time you spend on each activity. If it’s an activity you do daily, like sleeping (I hope so!), then add up all your sleeping hours in a day and put the

number under “Amount of time spent DAILY”. If the activity is done only a few times a week, then only fill out “Amount of time spent WEEKLY”. Do the same for activities only done a few times a month.

4. Be very realistic about your time estimations. If you usually spend 60 minutes for “Exercise” but only spent 30 minutes on it today, just put 60 minutes if that’s more usual. Include preparation or commute times involved in each activity. For example, it takes me 20 minutes to commute back and forth to my yoga studio. Then I spend 1 hour at class. Then I spend about 30 minutes to register for the class, get dressed, refreshed after, and socialise at the studio. In total, my exercise time daily is 110 minutes (20mins for commute + 60mins for class + 30mins for other stuff).
5. Put all time spent in minutes for easier computation.
6. Put all Add up all your time spent under each column on the “Total Time Allocated” row time spent in minutes for easier computation.
7. Then convert your “Amount of time spent DAILY” and “Weekly” to “Total Time Allocated Monthly” by multiplying your “Total Time Allocated” with the multipliers I’ve provided.

General Activities	Amount of Time Spent Daily	Amount of Time Spent Weekly	Amount of Time Spent Yearly
Sleep & Rest			
Meditation   Prayer time   Spiritual reading   Journaling			
Meals ( Including preparation / buying time)			
Shower   Getting Dressed   Grooming			
Exercise			
Work (Include commute time & average extended hours at work)			
Family (include time spent with family like taking care of kids and quality time with spouse.			
Social gatherings (Meeting up with friends, networking, etc. Including commute time.)			
Chores & errands (Laundry, dishes, organizing, administration like planning, budgeting, reading of mails, etc. For errands: Going to the bank, groceries, picking up mails, salon/barber visit etc.)			

General Activities	Amount of Time Spent Daily	Amount of Time Spent Weekly	Amount of Time Spent Yearly
Leisure (Movies, concerts, shopping, screen time (including social media), playing with pets, etc.)			
Community (Any volunteering already being done.)			
Others:			
<b>Total Time Allocated</b> <i>(Add all numbers in each column before this row)</i>			

	Multiply above by 30.4 and write the # below. (30.4 is the average # of days in a month)	Multiply above by 4.3 and write the # below. (4.3 is the average # of weeks in a month)	Write the same # above in the box below.
<b>Total Time Allocated Monthly</b>			
<b>Grand Total Time Allocated Monthly</b> <i>(Add all numbers on the row above)</i>			
<b>Buffer Time</b>			
<b>Grand Total Time Allocated Monthly with Buffer Time</b> <i>(Add "Grand Total Time Allocated Monthly" and "Buffer Time")</i>			
<b>Realistic Free Time Monthly (in Minutes)</b> <i>(Deduct your "Grand Total Time Allocated Monthly with Buffer Time" from 43,800, which is the total # of minutes in a month (average))</i>			
<b>Realistic Free Time Monthly (in Hours)</b> <i>(Divide your "Realistic Free Time Monthly (in Minutes)" by 60.)</i>			

## Notes:

- I didn't include vacations because they usually just take the place of work and other activities that are already plotted here.
- If you're like most people, you might actually end up with a negative number as your "Realistic Free Time" even before adding the Buffer Time. That's because most people have packed their lives with activities more than they have time for. That's the tricky reality. Don't fret! If you're in this situation, then you'll really need to go back to Step 1 of the Roadmap which is to Create a Minimum Margin in Your Life so you can claim back free time for yourself, and then for others.
- This exercise is to help you better understand your time management. So, as you "clean up" your schedule, keep updating this worksheet to see if you're able to arrive at a positive amount of "Realistic Free Time". That should be your goal!
- Only when you've finally identified a positive "Realistic Free Time" can you give your time effectively to others. I suggest that you postpone any commitment to volunteer before then. You will end up compromising your existing commitments as well as the volunteer partnership.

- Identify when this free time is available. Is it one hour a week? Which days of the week is it? Or is it 3 hours a month at a flexible schedule?

## II. MONEY

**Goal:** To identify how much *MONEY* you can give away. In the tables below, I call it “Surplus for Giving”.

### Instructions:

1. Go back to the lesson video where I talk about my two approaches in knowing how much to give. This exercise is just one way to do it.
2. If you haven't done any sort of expense tracking in the last 3 months, this is the time to do it. You won't be able to know how much extra money you have if you don't have an idea how much you are spending. I recommend the “HomeBudget” App by Anishu, Inc.
3. Once you've consistently tracked your expenses (everything!) for three consecutive months, you can fill out the tables below.

4. If your salary comes on a monthly basis, enter the amount under “Income Received Monthly”. If your other income is received only a few times a year, then compute the total in a year and put it under “Income Received Yearly”.
5. If the expense is paid on a monthly basis or paid a few times a month, enter the total amount in a month under “Expenses Paid Monthly”. For expenses paid only a few times a year, enter the total amount in a year under “Expenses Paid Yearly”.
6. The “Buffer Budget” under the Expense Sheet is for contingency. I set it at 10% of your computed total expenses.

Source of Income	Income Received Monthly	Income Received Yearly
Salary		
Bonuses		
Dividends		
Business Profits		



Others:		
Others:		
Others:		
<b>Total Income Received</b> ( <i>Total all numbers above this row.</i> )		
	Multiply above number by 12 (# of months in a year) and write it in the box below.	Copy the number above in the box below.
<b>Total Income Received Yearly</b>		
<b>Grand Total Income Received Yearly</b> ( <i>Total both numbers above this row.</i> )		



Expenses	Expenses Paid Monthly	Expenses Paid Yearly
Tithes		
Debt / loan payments		
Short-term savings (Money set aside for emergency fund, and non-investment tools)		
Investments: Mutual funds, stocks, bonds, etc. (Does not include insurances)		
Insurances: Life, hospitalization, accident, car		
Housing: Rental or payment on property excluding utilities		
Utilities: Electricity, gas, water, sewer, cable, internet, cleaning		
Transportation: Car payments, car repairs and maintenance, gas, car rental, public transport		
Personal: Food, eating out, groceries, medical		

Recreation: Activities done where you live - movies, sporting events, concerts.		
Vacation: Airfares, overseas accommodations, food, recreation		
Benevolence: Charitable giving, missions, gifts to family and friends.		
Others:		
<b>Total Expenses</b> <i>(Total all numbers above this row.)</i>		
	Multiply above number by 12 (# of months in a year) and write it in the box below.	Copy the number above in the box below.
<b>Total Expenses Yearly</b>		
<b>Buffer Budget</b> <i>(10% of your total expenses)</i>		
<b>Grand Total Expenses Yearly</b> <i>(Add "Total Expenses Yearly" and "Buffer Budget")</i>		

<b>Total Income Received Yearly</b>		
<b>Total Expenses Yearly</b>		
<b>Total Surplus for Giving Yearly</b> ( <i>Subtract "Total Expenses Yearly" from "Total Income Received Yearly"</i> )		

## Notes:

- Like when you take inventory of your time, you might discover that you don't have any surplus for giving. Once again, don't be dismayed. Your goal is to find that margin in your finances so you can allocate money for giving.
- I suggest not touching your tithes, debt repayment, savings and investments. You can look at the other expense items that you can save up on.
- As you re-adjust your spending, or when you receive additional income, go back to this exercise to see how much your surplus for giving is.

- If you have a positive amount of surplus, great! You now then have to see when this amount is actually available. Is it available on a monthly basis? Or does it become available on a certain time of the year? Then your giving (donation) should be scheduled around that.

### III. NON - MONETARY ASSETS

**Goal:** To identify what *NON-MONETARY ASSETS* you have available to give away.

**Instructions:**

1. Look around your house or your office (if you own it) to see what items you have that are available to give away.
2. These items can be a variety of things. Here's a quick list of what they can be:
  - a. Real estate - If not a property, then a part of your house, an extra room perhaps, might be available during certain periods in a year that can be offered as accommodation for traveling staff of nonprofit organizations or missionaries of churches).

- b. Automobiles - Either as a giveaway or for no-cost lending for a period of time. Nonprofits always have a need for automobiles for operations.
- c. Mechanical, electronic equipment and furniture - Either used or new, as long as they are still operational or in good condition to solve the problem they're meant for, can be very useful for nonprofit groups or their end beneficiaries as these are high-cost expenses for them. You can help fit a nonprofit facilities' with air conditioning units, kitchen equipment, computers, surveillance cameras, routers, office tables and chairs, etc.
- d. Auctionable items - One-way to help nonprofits raise funds is by supporting their gala auctions. These are high-ticket events that raise huge amounts of money that can cover a year or so of operational or program expenses. Some of the popular auctionable items include vintage collectibles, antiques, art pieces, wines & spirits, jewelry, designer goods, signed memorabilia, travel packages, and high-priced retail vouchers.

e. Personal items like clothes, shoes, and bags - Add these to the list too but my suggestion is to convert these into cash as a donation instead of passing them on to nonprofits as in-kind donations. It's usually costlier for them to sort out, store and distribute these type of items, unless a group specifies that these are what they need. I'd qualify first though why they would need such, as our lesson talked about purchasing these items from the locality instead of accepting in-kind donations especially from overseas.

Items / Assets Available for Giving	Description of Asset / Item


#### IV. INFLUENCE

**Goal:** To identify the relationships you have in your circle of INFLUENCE that can support giving opportunities.

Instructions:

1. You can do this part of the exercise before you find a nonprofit partner or after. Doing this before finding a partner gives you an idea of the breadth of resources through other friends that can support giving opportunities. Meanwhile, doing this after finding a partner will make this exercise easier to accomplish because you would already be able to know what the partner exactly needs. It's up to you.

## 2. On Part A: Skills available in your circle of influence.

- a. You can go on forever thinking of names appropriate for the various skills identified here, especially if you have tons of friends. So focus on the ones who've already shown you interest to volunteer their skills, especially if you're doing this exercise before finding a nonprofit partner. The idea here is to be an advocate for giving by encouraging others to check out volunteering opportunities themselves using their skills.
- b. The 3rd column helps you gauge whether the people you've thought of is for sure involved in the skill area or just "likely involved". When it's time to reach out to these people to offer them volunteering opportunities, then you can clarify their involvement in the skills area.

## 3. On Part B: Resources in your circle of influence.

- a. Think of people in your circle of influence who you know have shown interest to give. Then think of the resources they have other than their skills that are donatable to nonprofit groups. Think in the same way as you would profile your non-monetary assets for giving. It may feel like you're doing a lot of assumptions as you do this exercise. The idea is to be an advocate for giving.

For example, you may have a friend who owns a restaurant. Identifying him under “Events Space” can encourage you to start conversations with him about possibly doing a fundraising or awareness-raising event for your nonprofit partner in the future.

4. Add other skills and resources that I have missed on the empty rows.

### Part A: Talents and skills available in your circle of influence.

Talents and Skills	People You Know With These Skills	Are they “involved” or “likely involved” in this skill area?
Accounting		
Branding		
Business & Development		
Coaching		



Communications		
Culinary		
Data Analysis		
Database Administration		
Digital Advertising		
Digital Marketing		
Engineering		
Entrepreneurship		
Event Planning		
Executive Leadership		





Finance		
Fundraising		
Graphic Design		
Human Resources		
Information Technology		
Management		
Marketing		
Organizational Design		
Performance Arts (hosting, dancing, singing)		
Photography & Video		



Project Management		
Public Relations		
Research		
Sales		
Search Engine Marketing		
Social Media		
Sound Editing		
Sports Coaching		
Strategy Consulting		
Talent Recruitment		

Training		
Web Design		
Web Development		
Writing		

**Part B: Resources available in your circle of influence.**

Resources	People You Know With These Resources
Events Space (for giving events)	



Radio or TV Airtime (for public promotions of events or programs)	
Social Media Influence (for public promotions of events or programs)	
Food Supply or Catering Service (for giving events)	
Printing Service (for printing needs for programs or events)	
Audio Visual Equipment (for giving events)	
Storage Space (for program or event logistics)	
Transportation Service (for program and event logistics)	



## V. TALENTS, SKILLS & KNOWLEDGE

**Goal:** To identify what *TALENTS, SKILLS AND KNOWLEDGE* you have to support giving opportunities.

### Instructions:

1. This is a free-flow exercise. With the help of the list of talents and skills in Part IV, write down on the table below your own talents and skills that you can offer. Identify the ones that you have advanced or intermediate proficiency in. To be truly effective in the giving of your talents and skills, you should be able to do the projects given to you like you would in a paid job.
2. On the “Knowledge Areas” column, identify the subjects that you have advanced know-how of. For example: I’d include “Filipino language”, “Setting up a private limited corporation in Singapore”, and “Financial planning for a family of four” because I have comprehensive/excellent knowledge in these areas. Think of subjects that people have asked you to teach them about.

3. As you progress in the Purpose & Influence course, you will learn more about what the community development (or nonprofit) space needs and you'll be able to add to the list later on.

Talents & Skills	Knowledge Areas