

EXERCISE 3.1

Analysis of Current Giving

15–20 minutes

A. Recent Giving—To get a sense of where your giving has gone in the last year, fill out the chart below.

<i>Organizations donated to in the last 12 months</i>	<i>Amount given</i>	<i>Why I gave</i>

B. Characteristics of the Groups You Give to—Beginning with the list of organizations you generated, map your top ten groups on the chart below (see the list of strategies groups may employ following this exercise). Once you've done so, you'll begin to see the patterns of your giving.

Organization	Issues It Addresses <i>(refer to list in Chapter 2)</i>	Strategies It Employs <i>(refer to the list that follows)</i>	Size by Budget <i>Small:</i> <i>Less than \$250,000</i> <i>Medium:</i> <i>\$250,000–\$1,000,000</i> <i>Large:</i> <i>More than \$1 Million</i>	Age <i>Start Up:</i> <i>0–2 years</i> <i>New:</i> <i>2–5 Years</i> <i>Established:</i> <i>5–10 Years</i> <i>Sustained:</i> <i>10 Plus Years</i>	Scope <i>Local,</i> <i>State/Regional,</i> <i>National,</i> <i>International</i>

EXERCISE 3.1 continued

Reflection:

1. Within each set of characteristics, was your giving focused on certain categories, or varied? Were these intentional choices? If they were, what reasons were behind your choices?

2. What do you see as the pros and cons of the pattern your giving has taken within each category? (For instance, your dollars may have great impact on small, start-up organizations, but start-ups sometimes fail. Giving locally offers you personal connection, yet many serious problems are international in scope, and your dollar often goes further overseas.)

3. Looking at the characteristics of the groups you've funded, is there anything different you would like to do next year? What? Why?

C. Your Relationship with Groups You Gave to

Look again at the groups you listed in Section B of this exercise, and take stock of the relationships you have with them.

1. With what number of organizations are you a
 - Recipient of the organization's services
 - Volunteer
 - Member
 - Board member
 - Staff member
 - Other:
2. With how many do you
 - Know people in the organization
 - Know people who have been affected or helped personally by the organization (or ones like it)
 - Know other donors
3. With how many did you find out about them through
 - Direct mail
 - Family, friends, social club, association, or work colleagues
 - Local public foundation
 - Media
 - Other:
4. With how many do you
 - Want your donation to be completely anonymous
 - Want your donation held in confidence (only one or two people in the recipient organization know)
 - Don't care whether your donation is known
 - Want people in the community to know you made a donation
5. With how many did you stay informed by
 - Reading newsletters or annual reports
 - Attending events
 - Meeting one-on-one with staff or board
 - Other: _____
 - _____