

EXERCISE 10.1

Giving Methods

5–10 minutes

Put a check mark in the appropriate column for each of the methods you've used or ways you could consider giving financial support.

	<i>I have used this method</i>	<i>I want information on this method</i>	<i>Not applicable to me or not interested</i>
Financial gifts			
Written a check	_____	_____	_____
Given cash	_____	_____	_____
Donated by credit card	_____	_____	_____
Given stock	_____	_____	_____
Given real estate or other holdings	_____	_____	_____
Charitable estate planning	_____	_____	_____
Designated insurance policies or IRAs to a nonprofit beneficiary	_____	_____	_____
Other: _____	_____	_____	_____
Other: _____	_____	_____	_____
Non-financial gifts			
Given house or space for fundraising events, activists' or artists' retreats, or issues briefings	_____	_____	_____
Written a letter or placed a phone call of recommendation (leverage)	_____	_____	_____
Given equipment	_____	_____	_____
Given skills	_____	_____	_____
Other: _____	_____	_____	_____
Other: _____	_____	_____	_____

	<i>I have used this method</i>	<i>I want information on this method</i>	<i>Not applicable to me or not interested</i>
Decision making			
By self	_____	_____	_____
With partner	_____	_____	_____
With family (multi ages)	_____	_____	_____
With groups of other people from similar incomes	_____	_____	_____
With mixed-income group	_____	_____	_____
With group of co-workers or friends	_____	_____	_____
Gave decision-making power to others	_____	_____	_____
To group of professionals in the field, or representatives of constituency groups or activists	_____	_____	_____
To a staff member, program advisor	_____	_____	_____
To someone else to decide	_____	_____	_____
Other: _____	_____	_____	_____
Other: _____	_____	_____	_____
Mechanism			
Public community foundation or federation	_____	_____	_____
Donor-advised fund	_____	_____	_____
Donor circle	_____	_____	_____
Giving circle	_____	_____	_____
Online donation	_____	_____	_____
Venture philanthropic fund	_____	_____	_____
Loan to a nonprofit or individual	_____	_____	_____
Investment in a community loan or micro- enterprise fund	_____	_____	_____
As part of a mixed group of low-income and wealthy activists	_____	_____	_____

EXERCISE 10.1 continued

	<i>I have used this method</i>	<i>I want information on this method</i>	<i>Not applicable to me or not interested</i>
Workplace or payroll deduction	_____	_____	_____
Family foundation	_____	_____	_____
Supporting foundation	_____	_____	_____
Other: _____	_____	_____	_____
Other: _____	_____	_____	_____

Designation of donations

Operating expenses	_____	_____	_____
Capital expenses (e.g., building or equipment)	_____	_____	_____
Grantmaking funds	_____	_____	_____
Leadership sabbaticals	_____	_____	_____
Endowment gifts	_____	_____	_____
Matching or challenge gifts	_____	_____	_____
Technical assistance	_____	_____	_____
Scholarships	_____	_____	_____
Loans	_____	_____	_____
Existing debt reduction	_____	_____	_____

Time frame

One-year gift	_____	_____	_____
Multi-year gift	_____	_____	_____
Gift with no amount of time attached	_____	_____	_____
Planned gift (during lifetime or upon death)	_____	_____	_____

