



## **WORKSHEET 8.4** continued

### **Fundraising**

I leveraged my ability to support organizations by

- learning about fundraising
- fundraising from individuals
- hosting events for nonprofits or politicians
- co-hosting large events (e.g., buying a table of seats and organizing friends to come)
- speaking as a donor at events to motivate others to give
- speaking to media about my giving
- other: \_\_\_\_\_

### **Giving**

I gave

- small amounts to many groups
- larger amounts to several groups
- a balance of the two

I gave to

- too many groups
- enough groups
- not enough groups

As a percentage of income or assets I gave

- adequately
- less than I could have
- more than I could really afford

I collected mail requests and gave to selected ones

- as they came in
- monthly
- quarterly
- yearly
- not at all

I attended fundraising events

- once or twice
- quarterly
- monthly
- more often
- not at all

I generally gave

- anonymously
- using my name
- publicly if asked

I gave to the following number of issues or populations:

- 1-2
- 3-4
- 5-6

I evaluated where to give by

- reading annual reports, funding proposals, or direct mail pieces
- going on site visits or talking to staff
- attending briefings on the issues I give to
- talking to other funders and activists
- checking with groups that evaluate nonprofits
- listening to my heart
- other: \_\_\_\_\_

**Planning**

I followed an overall giving plan that named how much I would give of

- income
- assets
- time

## **WORKSHEET 8.4** continued

My giving plan specified

- my areas of focus
- the types of organizations and strategies I want to support

I reflected on my overall giving

- at the beginning or end of the year
- on a regular basis during the year (how often?)
- through drawing, writing, or talking with others
- through a formal evaluation process

I talked or consulted with the following people about my philanthropy

- a financial planner or investment manager
- an estate attorney
- a friend or fellow donor
- a mentor or philanthropic advisor
- a development director
- foundation staff
- an activist involved in the areas I give to
- a donor support network
- other: \_\_\_\_\_

### **Identity and Community**

I let others know I am

- a donor/giver/philanthropist
- a volunteer or activist
- a donor activist or donor organizer

I made some of my giving decisions

- with others (partner, family, friends)
- by talking with other donors who give to what I do
- with support of a donor network or giving club
- other: \_\_\_\_\_

