

Strategic Questionnaire

Philanthropy is most effective when you organize your giving according to a thoughtful strategy. A strategic approach provides a clear framework for giving, allowing you to make more efficient decisions about where you want to direct your resources.

This questionnaire is designed to help you think through your own philanthropic values and experiences to develop a giving strategy that will be both effective and satisfying.

I. Current Giving

1. What nonprofit organizations do you currently support?

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2. Of those organizations, do you support them all equally?
Do you support them all regularly?

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3. Why do you support those organizations? (please check all that apply)

- ☐ Because you have a relationship with the organization (i.e. your alma mater, your children’s schools, you are a volunteer, you attend their events)
- ☐ Because a friend, associate or relative asked you to make a gift
- ☐ Because the kind of work they are doing is important to you (i.e. after-school programs, helping the elderly, providing job training, etc.)
- ☐ Because you received materials/solicitation in the mail
- ☐ Other

4. Of the organizations you currently support, which gives you the greatest satisfaction? Why? Which gives you the least satisfaction? Why?

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5. Do you intend to continue to support the organizations you note in Question #1 on an ongoing basis? Would you like to give more to them? Less to them? Why?

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6. Do you currently volunteer with nonprofit organizations? Which ones? Why? Do you also make a financial contribution to those nonprofits? Would you like to?

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7. Of all the gifts you have ever made, which is the one that gives you the greatest sense of pride or strongest feeling of satisfaction? Why?

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II. Allocation

1. What is a large grant amount to you?
2. What is the largest gift or grant you have ever made to an organization?
3. What motivated you to make that gift? Was it a satisfying experience? Why or why not?
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4. You have \$100,000 to give to nonprofits. Below is a list of various kinds of nonprofits you can support. Allocate the \$100,000. You can add categories if you like.
- \$ Arts, Culture & Humanities
- \$ Human and Social Services
- \$ Education
- \$ Environment/Animals
- \$ Health/Wellness
- \$ Religious

III. Your Philanthropy

1. Is it more satisfying to give to things your friends and family care about supporting, or do you prefer to find things on your own?

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2. Who is involved in helping you think about your giving? How important is their input? Does each involved person have an equal voice?

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3. Imagine a newspaper story in the year 2050, announcing an event to honor your philanthropy for years of high-impact charitable giving and for having changed the world in some significant way. How would the headline read and what would some of the specifics of the article be?

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Please feel free to contact your Relationship Manager or the Donor Relations Team at donorrelations@calfund.org if you have any questions. We are here to help.

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