

Values Questionnaire

To give in accordance with your deepest values, you must first determine what those values are—a task more easily said than done. Our values are shaped by our personal influences and experiences, which create a hierarchy of priorities. Only by understanding these values will you be able to shape a giving strategy that will be satisfying and energizing for the long haul.

Values Discussion

What benefits do you want to reap as a result of your giving?
What are the goals? (please check all that apply)

- ☐ Want to give back to the community
- ☐ Desire to address (or learn about) a specific issue
- ☐ Want to be exposed to needs of the community
- ☐ Wish to learn to give effectively
- ☐ Want to get involved
- ☐ Want to engage in social networking
- ☐ Want to have fun
- ☐ Sense of responsibility, obligation, or duty
- ☐ Other

Questions

1. What is important to you and which values guide the choices you make in life? What would you consider your most important values?

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|-------------------------------------|--------------------------------------|
| ☐ Creativity | ☐ Generosity |
| ☐ Community | ☐ Inclusivity |
| ☐ Compassion | ☐ Kindness |
| ☐ Diversity | ☐ Justice |
| ☐ Equity | ☐ Peace |
| ☐ Other | |

2. Why are these values so important to you?

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3. How do you manifest these values in your life, particularly through your actions?

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4. Think about 2–3 formative experiences in your life. How did they shape your core values?

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5. Identify 2–3 people (they could be family members, other people you know or historic figures) who have been strong influences on you. What values did they teach you?

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6. What values did your parents/family pass on to you? What do you think are the values common to your family?

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7. How do the values you have identified speak to the kind of giver you want to be?

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8. When you read the newspaper or hear about current events, what sort of events make you angry or upset, or make you think, "That needs to change"? What stories make you happy or make you think, "We need more of that!"?

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9. Who in the world exemplifies your core personal values, and why?

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10. Which of your motivations and character traits do you believe are most valuable to you in attaining your full potential as a donor?

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11. How do these traits manifest themselves in other parts of your life—family, work, volunteering?

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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.

