

The Giving Initiative



One of the major challenges as a donor is the question of time – give more now or save for later? Spend for immediate impact or hold off and wait for a more opportune moment?

While this tension can never be fully resolved, the COVID-19 pandemic has brought home the urgency of giving generously in a timely matter. The communities hit hardest have been those least able to afford it, and many of our nonprofit partners have played a vital role in saving lives. At the same time, these organizations have seen their resources strained to the hilt, with barely enough money to pay their staff.

In light of this urgent need, the California Community Foundation (CCF) has launched the Giving Initiative to help mobilize philanthropic dollars to meet pressing needs both for short-term demands and longer-term investments. The Giving Initiative is a campaign to encourage all holders of donor-advised funds to donate at least 5% of their asset balance to charity every year. This helps to ensure a steady flow of resources to nonprofits in their time of need,

and it helps donors to develop the giving habits and expertise that will make them more effective philanthropists over the long run.

The Giving Initiative is a goal, a best practice to help ensure that philanthropists and their dollars remain active and engaged in the community. While the pandemic has brought forth particularly acute circumstances across the region and the nation, there are always pressing needs and causes for whom having resources now, rather than later, can make all the difference in the world.

Giving more from your DAF now, when many of our neighbors are still struggling, will have the greatest impact on our collective, long-term recovery.



As one investment adviser puts it, “We want to invest that money in the community, not just have it sitting in a pot somewhere.”

For donors who have already developed the habit of giving, aiming for 5% a year may not be a stretch—indeed, many donors regularly give more. But for donors who are not used to such regular and significant disbursements, 5% may seem intimidating. CCF is ready to help with all parts of the process.

CCF will calculate the specific amount of a 5% disbursement, based on the balance of a donor’s fund at the beginning of the year, so donors know what target to aim for. We will also offer an annual meeting with the Donor Relations Team to create a giving plan for those donors that are interested in additional support. For some donors, this will set the pattern for years to come by helping donors establish multi-year grants to their favorite charities. Others may prefer to adjust and customize each year, depending on changing interests and circumstances. CCF’s advisers are excited to help you identify causes and charities that align with your areas of interest, and to find the best match.

Aiming for that 5% goal creates a structure for learning through giving. Donors can select from familiar and well-established charities or seek out lesser-known organizations. They can give broadly across many areas or target particular issues. They can research and investigate, pore through financial documents or make site visits, talk to fellow donors and issues experts. Seeing how far 5% goes, they may experiment with giving more. And by giving each year, donors can find if their interests hold steady or tend to shift with events.

Many donors also find the discipline and structure of an annual giving target to be a motivator, shifting from abstract and indeterminate goals to a regular practice of implementation with concrete deadlines and firm dollar commitments. Putting dollars to work in the world creates real-world impact that makes a tangible difference in people’s lives.

At CCF, we believe that philanthropy is a skill, and like many skills, it is honed through a combination of experimentation, repetition, and conscious intention. It is also the fulfillment of a strong desire to make a difference, an assertion of one’s share in a collective responsibility. By helping donors to aim for a 5% annual mark, the Giving Initiative enables donors to give better, and to make the world better while doing so.

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

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