

Worksheet 7.5
How You Did as a Donor

Take a few minutes to recall your giving and volunteering over the past year. Check any of the items below that describe your activities. Then go through the checklist again and put a star next to anything you would like to do differently in the coming year.

Volunteering

I volunteered each week or month (check one)

_____ 1–2 hours

_____ 3–5 hours

_____ 6–10 hours

_____ 11–16 hours

_____ 17–20 hours

_____ 21+ hours

I volunteered with the following organizations and did the following activities:

I increased my ability to assist the nonprofit sector by

_____ Taking a class (for example, on how to be a board member, on fundraising, or for other skills)

_____ Reading about nonprofit or community issues

_____ Other:

Fundraising

I leveraged my ability to support organizations by

_____ Learning about fundraising

_____ Fundraising from individuals

_____ Hosting events for nonprofits or politicians

_____ Cohosting large events (for example, 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:

Worksheet 7.5
How You Did as a Donor, Cont'd

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

Worksheet 7.5
How You Did as a Donor, Cont'd

I generally gave

- Anonymously
- Using my name
- Publicly if asked
- Through a foundation or donor-advised fund where I won't be identified personally

I gave to the following number of issues or populations:

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

I evaluated where to give by

- Checking their info on the Web or their e-newsletters
- 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
- Reading through groups' proposals
- Checking with groups that evaluate nonprofits
- Listening to my heart
- Other:

Planning

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

- Income
- Assets
- Time

My giving plan specified

- My areas of focus
- The types of organizations and strategies I want to support

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How You Did as a Donor, Cont'd

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
- A wealth coach or personal coach
- Other:

Identity and Community

I let others know I am

- A donor, giver, or 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 other activists or community leaders at the decision-making table
- Informed by other leaders and activists or donors or news
- With support of a donor network or giving club

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_____ Other:

Integration of Values

In addition to giving and volunteering, I expressed my values by

_____ Loaning money to nonprofit organizations

_____ Investing in socially responsible companies

_____ Investing in community development loan funds and micro-enterprise funds

_____ Practicing ways to live more simply

_____ Protesting policies I don't believe in

_____ Voting to get things changed or to preserve what I think is just

_____ Other:

Overall I feel _____ about my giving plan and process.

Next year I want to _____