



Questionnaire for developing a Good Giving strategy

Understanding motivations and objectives in giving

Identifying key priorities

Defining a charitable mission

Creating a vision and drafting guiding principles

Historical/Current Giving

What charities, schools or other nonprofit organisations have you supported in the past/do you currently support?

Why were these relationships first established?

Are you focused in your giving? On what?

Have you preferred to address symptoms or causes in your giving?

Time Horizon: If establishing a family foundation, do you want it to be long lasting or to have it disperse all funds within a given time period?

Do you support known organisations already producing results or do you prefer to seek social entrepreneurs with innovations?

New Areas of Interest

Are there any other organisations that you are currently involved with or for which you serve on the board?

Are there other organisations that you may have heard about or read about that interest you? Why?

Is there an upcoming event or deadline that has prompted you to begin this process at this point in time?

Which are the community or charitable issues that you really care about?

Do you have a sense of obligation to any institutions, organisations or causes?

Is there something about the world that you would like to see changed?

What issues and causes are you passionate and excited about?

The Role and Importance of the Family

Do you want to involve your family in your giving?

Do you want to involve your children?

Ways of Giving

Do you want to give only money or do you have particular skills you would like to offer?

How involved would you like to be in your giving?

How much time do you have to invest? Are there other family members who would also like to be involved?

Are you also interested in potentially funding a media project around the giving? Or being an advocate? Convening other interested parties (and potential donors)?

Are you interested in leaving a legacy that includes charity or other nonprofit organisations?

Strategic Giving

Do you already have a vision of your philanthropy and what it can achieve?

Do you want family members or future generations to continue your giving legacy?

As part of the planning process, will you consider developing a family mission statement?

Is it important that you exercise some control over organisations you give to?

Would you be interested in a family retreat and/or an education programme of any sort, either formal or informal, to help you develop and execute a (family) giving plan?

Or do you just want something simple?