

Philanthropy Self-Discovery

The information you provide here will help guide your philanthropic journey. By sharing your interests and experience, we can curate resources and foster discussions that are tailored to your goals.

1. Rate your Knowledge

Please rate your knowledge of each statement on a scale of 1 to 4, where 1 = no/low knowledge and 4 = strong knowledge

- _____ I have experience collaborating with nonprofit organizations.
(e.g. via Board, as donor, etc.).

- _____ I understand the operational differences between a private foundation and a donor-advised fund (DAF).

- _____ I have engaged in grantmaking – either through a foundation or via a DAF.

- _____ I have conducted a site visit to a nonprofit organization
(ahead of, or as part of, a grant awarded by me).

- _____ I have prioritized a set of issues/organizations to support.

- _____ I am familiar with the concept of “trust-based” grantmaking.

- _____ I am familiar with U.S. regulations governing international grantmaking.

- _____ I am comfortable assessing projects and organizations.

2. Personal Values

Have you already participated in a personal values discovery exercise?

- a. If yes, what are your core values?
- b. If not, are you interested in doing so? (Y/N)

Yes:

No:

3. Operational Interests

To identify your areas of greatest interest, please pick your TOP TWO operational topics related to the practice of philanthropy:

- ☐ Mission & Strategy
- ☐ Governance & Structure(s)
- ☐ Budgeting
- ☐ Grantmaking Process
- ☐ Impact Assessment & Learning
- ☐ Partnerships & Collaboration
- ☐ Innovation & New Practices

4. Giving that motivates

When you think about both opportunities and needs in your community and in the world, what issues/areas motivate you?

5. Rate your experience

How would you rate yourself in philanthropy experience/expertise spectrum (1 -5)?

1 = New Grantmaker; 5 = Seasoned giver via DAF or foundation

6. Vision Statement

Write a brief (2-3 sentence) vision statement regarding your philanthropy for in 2025.

7. Additional Clarity

What specific aspects of your philanthropy are you seeking clarity or assistance with?

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