

THE PHILANTHROPY TOOLKIT

An Introduction to Giving Effectively

THE STANFORD UNIVERSITY
EFFECTIVE PHILANTHROPY LEARNING INITIATIVE



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WORKSHEET

REFLECTING BACK & LOOKING FORWARD

INSTRUCTIONS

Reflect on the questions below to assess your philanthropy and decide how you would like to refine it in your next giving cycle.

- Are the issues you prioritized still aligned with your philanthropic goals and values?
- Are you satisfied with your overall philanthropic budget?
- Did your reactive, proactive, and emergency giving align with your original allocation across these three buckets? If not, why not?
- Are you satisfied with your family's involvement in this last cycle? What went well? What did not?
- What are some ways you can expand your philanthropic learning opportunities in the next cycle—whether in regard to a particular issue or the process more generally?
- Would you like to obtain professional support for any areas in your next round of philanthropy?
- Are you satisfied with the giving vehicles you used in this last cycle?
- Would the next round of your philanthropy be a good time to start, continue, or deepen your collaboration with other donors?



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A series of 25 horizontal dotted lines for writing.