



**SOCIAL DELTA**

---

## Philanthropy Self-Evaluation

---

Take a minute to read through and reflect on the following set of questions. Considering your preferences is the first step when developing your strategy for effective philanthropy.

In which of the following areas of social benefit are you interested?

### International Giving

- Overseas development aid / poverty alleviation
- Human rights
- Global citizenship and governance
- Disaster funds

### Health Care

- Health care delivery / hospitals
- Research
- Hospice care
- Care for the elderly
- A particular disease: \_\_\_\_\_

### Local Charity

- Food bank
- Shelter
- Service club: \_\_\_\_\_
- Family services
- Child care
- Amateur athletics
- Community organization: \_\_\_\_\_

### Environmental

- Protection of animals
- Public education
- Advocacy
- Green building/sustainable living

.../2

Religious organizations

- By issue: \_\_\_\_\_
- By denomination: \_\_\_\_\_

Cultural Organizations

- Performing arts: \_\_\_\_\_
- Museums
- Libraries
- Historical sites

Poverty alleviation

- Social entrepreneurship
- Microcredit
- Immigration/settlement services

Education

- Primary
- Secondary
- University
- Community
- Vocational
- Teacher training institutions

Other

- Military / veterans
- Charitable corporations
- Charitable trusts
- Community foundations
- Other: \_\_\_\_\_

WHAT SORT OF RECOGNITION WOULD YOU LIKE FOR YOUR GIFT?

- None at all
- Nothing but a thank you and a tax receipt
- Invitations to special events/meetings
- Genuine interest in why I have made this gift/pledge.
- Public acknowledgement in media, annual report, public presentations
- A voice in how your donation is used.
- Advisory role in the direction and operation of the charity

.../3

## WHAT SORT OF GIFT WOULD YOU LIKE TO CONSIDER?

- I want to become a monthly donor
- I want to make a modest cash contribution to several organizations
- I want to make a sizable contribution that will make a significant difference to a cause or a project
- I have a gift of a product or a service to help the charity
- I want to donate a gift of securities, land or art
- I want to give a large amount now, but receive annual payments for my life (annuity or charitable remainder trust)
- I want to name a worthwhile cause in my will
- I want to name a charity as a life insurance beneficiary
- I want to only have the charity spend the interest on a capital endowment

## GENERAL:

Have you spoken with your family and friends about organizations they believe are doing exemplary work?

Have you had bad experiences with any specific charities in the past? Do you feel that the organization may have changed due to a change in leadership or staff, or what change would be necessary?

Are you interested in making donations through only religious organizations or secular organizations, or does it matter?

Do you want to designate your gift to a specific project or program?

What sort of information or relationship do you need to really trust the charity?

## NEXT STEPS:

By considering these questions, you have a starting point to help research the organizations where you'd like to invest in charitable work. If you'd like to discuss available options, or if you'd like to have a shortlist of organizations that will meet your expectations, Social Delta can do the research and provide a comprehensive list of options and recommendations for your consideration.

*Contact Jonathan Wade at [socialdelta@gmail.com](mailto:socialdelta@gmail.com) or at 613-884-0831 for more information on how SOCIAL DELTA can help you invest in effective social change.*