

#NEXTGENDONORS

Next Gen Major Donors Study
Survey Questions

Welcome!

Welcome to the Next Generation of Philanthropic Leaders Survey. This research is a collaboration between 21/64 and the Johnson Center for Philanthropy, and we both thank you very much for your participation.

We are eager to learn about what you do in your philanthropic activity, and why you do it that way. The information gathered here will help us all understand how you and others will shape the philanthropy of the future.

We hope you will learn something about yourself, as well, while answering the questions.

The survey should take approximately 15-30 minutes to complete.

You can pause and return to finish the survey later. To do so, click "Exit Survey" in the top right corner, then return using the same link that you clicked to get here now - just be sure to use the same computer and IP address each time.

Part 1 - Your Philanthropic Activity

1. First, please let us know the name of the person or organization from whom you received the link to this survey. (Note that giving this information will not reveal your identity.)

***2. Next, please indicate your age.**

Part 1 – Your Philanthropic Activity

We want to learn about your family's philanthropic activity as well as your own personal giving and volunteering. Below is how we define those categories for purposes of this research.

Your Family's Philanthropy =

The giving and volunteering activity of all the people in your extended family, including what they do on their own (to the extent you know) and together as part of a family philanthropic vehicle(s).

The giving and volunteering that you, your spouse/partner, and/or your children do through any family-governed vehicle(s) using family resources, including discretionary funds (but not what you do by yourselves and with your own resources).

Your Own Personal Philanthropy =

The giving and volunteering activity that you, your spouse/partner, and your children do on your own and using your own resources.

NOTE: If you are the primary wealth creator in your family and other members of your family join you in giving that wealth philanthropically, then count all that activity as part of your own personal philanthropy. And please explain this situation in the comment boxes provided.

Thanks, and on with the survey...

Part 1 – Your Philanthropic Activity

3. The following are commonly used charitable giving vehicles. Please identify which vehicles you currently use in your personal giving, and which ones your family uses in family giving. (Click all that apply.)

	Personal	Family	Don't know
Personal check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cash (e.g., checkout donation, collection plate, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donor-advised fund at a community foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donor-advised fund at a financial institution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Donor-advised fund at another institution (e.g. Jewish Federation, hospital, university)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Private foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corporate giving through a family business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Giving circle or other pooled giving vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workplace giving/payroll deduction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bequest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gift annuity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charitable remainder trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charitable lead trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify and indicate if "personal" or "family")

4. Looking at the list above, what is your best approximation of your total annual personal giving using all the vehicles you indicated?

- | | |
|---|--|
| <input type="radio"/> I am not currently giving personal money philanthropically. | <input type="radio"/> \$10,001 - \$15,000 |
| <input type="radio"/> \$1 - \$1,000 | <input type="radio"/> \$15,001 - \$20,000 |
| <input type="radio"/> \$1,001 - \$2,500 | <input type="radio"/> \$20,001 - \$30,000 |
| <input type="radio"/> \$2,501 - \$5,000 | <input type="radio"/> \$30,001 - \$50,000 |
| <input type="radio"/> \$5,001 - \$7,500 | <input type="radio"/> \$50,001 - \$100,000 |
| <input type="radio"/> 7,501 - \$10,000 | <input type="radio"/> More than \$100,000 |

5. Looking at the list above, what is your best approximation of your family's total annual giving using all the vehicles you indicated? We realize you might not know the exact amounts, but please make your best estimate.

- | | |
|---|--|
| <input type="radio"/> \$0 - \$10,000 | <input type="radio"/> \$500,001- \$1 Million |
| <input type="radio"/> \$10,001 – \$25,000 | <input type="radio"/> \$1 - \$5 Million |
| <input type="radio"/> \$25,001 - \$50,000 | <input type="radio"/> \$5 - \$10 Million |
| <input type="radio"/> \$50,001 - \$100,000 | <input type="radio"/> More than \$10 Million |
| <input type="radio"/> \$100,001 - \$250,000 | <input type="radio"/> Don't know |
| <input type="radio"/> \$250,001 - \$500,000 | |

6. Looking at the list above, please provide an estimate of your family's total endowed assets in all of the philanthropic vehicles you indicated.

- | | |
|--|---|
| <input type="radio"/> \$0 - \$500,000 | <input type="radio"/> \$25 - \$50 Million |
| <input type="radio"/> \$500,000 - \$1Million | <input type="radio"/> \$50 - \$100 Million |
| <input type="radio"/> \$1 - \$2.5 Million | <input type="radio"/> \$100 - \$500 Million |
| <input type="radio"/> \$2.5 - \$5.0 Million | <input type="radio"/> More than \$500,000 Million |
| <input type="radio"/> \$5.0 - \$10 Million | <input type="radio"/> Don't Know |
| <input type="radio"/> \$10 - \$25 Million | |

Part 1 – Your Philanthropic Activity

7. Which generation in your family created the majority of the wealth used for your family's giving?

- I am the primary wealth creator
- Other family members in my generation
- My parents' generation
- My grandparents' generation
- My great-grandparents' generation
- Generations before my great-grandparents
- Don't know

8. If your family's giving is focused primarily on one or a few specific communities, please click the statement that best describes whether you live in those specific communities.

- I live there currently, and plan to in the future.
- I live there currently, but don't plan to in the future.
- I don't live there currently, but plan to in the future.
- I don't live there currently, and don't plan to in the future.
- Not applicable - My family gives in many different communities and/or nationally/internationally.
- Don't know.

Part 1 – Your Philanthropic Activity

9. Looking to the future, how involved do you expect to be in your family's giving process over the next decade or so?

- Very involved
- Somewhat involved
- Minimally involved
- Not involved at all

10. How involved are you currently in your family's giving process?

- Very involved
- Somewhat involved
- Minimally involved
- Not involved at all

Part 1 – Your Philanthropic Activity

11. Please indicate how you are currently involved in your family's giving (click all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Serve on your foundation's primary board. | <input type="checkbox"/> Attend family retreats. |
| <input type="checkbox"/> Serve on foundation's junior board, associate board, or other next gen committee. | <input type="checkbox"/> Discuss family mission and legacy. |
| <input type="checkbox"/> Attend foundation board meetings, but do not vote. | <input type="checkbox"/> Help choose recipients for family giving. |
| <input type="checkbox"/> Serve on/Asked to serve on a foundation committee. | <input type="checkbox"/> Help choose areas or causes for family giving. |
| <input type="checkbox"/> Serve as paid staff of your foundation. | <input type="checkbox"/> Offer opinions directly to family members about our giving. |
| <input type="checkbox"/> Engage in conversation with foundation staff or board members. | <input type="checkbox"/> Volunteer as part of family service efforts. |
| <input type="checkbox"/> Participate in other formal meetings to discuss family giving. | <input type="checkbox"/> Review financial or investment information. |
| <input type="checkbox"/> Participate in family giving events or other processes. | <input type="checkbox"/> Other |

Other (please specify)

12. At what age were you first included in your family's philanthropic activities?

- 10 or younger
- 11-15
- 16-20
- 21-25
- 26-30
- 31-35
- 36-40

Part 1 – Your Philanthropic Activity

13. Approximately how old were you when you first started your own charitable giving, using your own resources?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="radio"/> 10 or younger | <input type="radio"/> 26-30 |
| <input type="radio"/> 11-15 | <input type="radio"/> 31-35 |
| <input type="radio"/> 16-20 | <input type="radio"/> 36-40 |
| <input type="radio"/> 21-25 | <input type="radio"/> Not applicable |

14. Approximately how old were you when you first volunteered?

- | | |
|-------------------------------------|--------------------------------------|
| <input type="radio"/> 10 or younger | <input type="radio"/> 26-30 |
| <input type="radio"/> 11-15 | <input type="radio"/> 31-35 |
| <input type="radio"/> 16-20 | <input type="radio"/> 36-40 |
| <input type="radio"/> 21-25 | <input type="radio"/> Not applicable |

15. Please briefly describe one or two of your initial experiences of becoming engaged in giving and/or volunteering, either with your family, or on your own. If you can, please explain how these experiences, or other family philanthropic traditions, have influenced your philanthropy over the years.

Part 1 – Your Philanthropic Activity

16. In which of the following ways have you acted philanthropically over the past twelve months? (Click all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Given money via a person-to-person request. | <input type="checkbox"/> Shared expertise pro bono to help out an organization and/or an individual. |
| <input type="checkbox"/> Given money through the postal service. | <input type="checkbox"/> Been a member of a religious organization. |
| <input type="checkbox"/> Given money online via an individual organization's website. | <input type="checkbox"/> Been a member of a service club. |
| <input type="checkbox"/> Given money online via a donation site/giving portal (e.g., Network for Good, Global Giving, etc.). | <input type="checkbox"/> Been a member of another nonprofit organization. |
| <input type="checkbox"/> Given money via Facebook or other social networking site. | <input type="checkbox"/> Served on the board of a nonprofit organization. |
| <input type="checkbox"/> Given money via text message. | <input type="checkbox"/> Served on the board of a foundation (other than your own family foundation). |
| <input type="checkbox"/> Given money via a mobile application. | <input type="checkbox"/> Raised money for an organization or cause by participating in an event (e.g., fun run) or selling something (e.g., raffle tickets, Girl Scout cookies). |
| <input type="checkbox"/> Given cash and/or food to someone on the street. | <input type="checkbox"/> Raised money for an organization or cause by other means (e.g., serving on a committee, making calls or personal solicitations). |
| <input type="checkbox"/> Given cash via a checkout donation, collection plate, or similar means. | <input type="checkbox"/> Encouraged family, friends, or others to give or volunteer. |
| <input type="checkbox"/> Pledged money over the phone. | <input type="checkbox"/> Promoted a cause or organization using online means (e.g., blog, social networking site). |
| <input type="checkbox"/> Made a contribution as part of a charity event (e.g., purchased tickets or a table, charity auction bids, etc.). | <input type="checkbox"/> Advocated or lobbied for an organization or cause (e.g., contacting policymakers, speaking or writing something to educate the public). |
| <input type="checkbox"/> Given volunteer time to an organization or cause. | <input type="checkbox"/> Participated in a protest, rally, or other social movement activity. |
| <input type="checkbox"/> Given materials (clothing, food, etc.) in-kind to an organization or cause. | <input type="checkbox"/> Participated in grassroots organizing. |
| <input type="checkbox"/> Helped out a friend, family, neighbor, etc., informally. | <input type="checkbox"/> Participated in a peer network with other donors. |
| <input type="checkbox"/> Provided networking information for an organization or individual. | <input type="checkbox"/> Other |

Other (please specify)

17. On average over the past twelve months, how much time per month did you spend doing the activities you selected in the previous question?

- 0 hours
- 1-5 hours
- 6-10 hours
- 11-20 hours
- 21-30 hours
- 31-40 hours
- 41+ hours

18. In general, how would you rate your level of experience with philanthropy (both giving and volunteering)?

- Very experienced
- Fairly experienced
- Some experience but lots to learn
- Just beginning to learn
- No experience

Part 1 – Your Philanthropic Activity

The next two questions ask about your personal financial situation. This is important information to gather because previous research has shown that a person's financial situation often affects their philanthropy quite a bit.

Also, a reminder that responses to this survey are recorded anonymously.

19. What is your best approximation of your current personal net worth? Net worth is defined as what you personally own (assets like deposits, stocks/bonds, real estate, trust funds, savings/retirement accounts, and other possessions) minus what you owe (liabilities like mortgages, loans, credit card debt, etc.)?

- | | |
|---|--|
| <input type="radio"/> Less than \$100,000 | <input type="radio"/> \$10 - \$25 Million |
| <input type="radio"/> \$100,001 - \$500,000 | <input type="radio"/> \$25 - \$50 Million |
| <input type="radio"/> \$500,001 - \$1 Million | <input type="radio"/> More than \$50 Million |
| <input type="radio"/> \$1 - \$10 Million | |

20. What is your best approximation of your annual personal income (household income from all sources) before taxes?

- | | |
|---|--|
| <input type="radio"/> Less than \$25,000 | <input type="radio"/> \$250,001 - \$500,000 |
| <input type="radio"/> \$25,001 - \$50,000 | <input type="radio"/> \$500,001 - \$1 Million |
| <input type="radio"/> \$50,001 - \$100,000 | <input type="radio"/> \$1 Million - \$10 Million |
| <input type="radio"/> \$100,001 - \$250,000 | <input type="radio"/> More than \$10 Million |

Part 2 - Philanthropic Strategy, Causes, & Decisions

Now we turn to questions about how you engage in your philanthropy.

21. On this page and the next is a list of statements summarizing possible components of a strategy for engaging in philanthropy. Please indicate how important each component is in your own personal giving strategy.

	Very Important	Somewhat Important	Minimally Important	Not at all Important
I first decide my philanthropic goals or ideal solutions, and then search for potential recipients who fit those.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I give to smaller organizations, or those that others overlook.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I fund organizations attempting new, innovative approaches.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I fund efforts that address root causes and attempt systemic solutions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I support groups that advocate for policy change and/or challenge the status quo.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to do my philanthropy in ways that promote diversity and inclusiveness.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I conduct due diligence and do research before deciding who to support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to have information about an organization's proven effectiveness or measurable impact before deciding whether to support it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to have information about an organization's governance practices, leadership, and/or financial responsibility before deciding to support it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to have information about what percentage of an organization's funds go to programs vs. to overhead or fundraising costs before deciding to support it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I require and/or review evaluations or reports before renewing support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Part 2 - Philanthropic Strategy, Causes, & Decisions

22. Please continue to indicate how important each statement is in your own personal giving strategy.

	Very Important	Somewhat Important	Minimally Important	Not at all Important
I prefer to give bigger donations to fewer recipients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to give multi-year donations or commitments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer to fund a nonprofit's general operating capacity, not just specific programs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to give only when I know, or can designate, exactly how my contribution will be used.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I try to work closely with the groups I support, giving time and expertise as well as money.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I often recommend a cause or organization to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I collaborate with others in my giving – e.g., by pooling/matching our funds or sharing information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I look for ways to be a leader or organizer, not just a donor.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I look for ways to use my money in socially beneficial ways beyond just donations, such as making loans, investing in socially responsible companies, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I think foundations should give more than the federally required 5% each year, and/or should even spend down their endowments rather than exist in perpetuity.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I believe traditional approaches to philanthropy are limited and try to do my philanthropy in new ways.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

Part 2 - Philanthropic Strategy, Causes, & Decisions

23. Please identify which types of causes and organizations you support and which ones your family supports. (Click all that apply.)

	Personal	Family
Arts & Culture	<input type="checkbox"/>	<input type="checkbox"/>
Basic Needs (incl. human services, housing, disaster relief, food security)	<input type="checkbox"/>	<input type="checkbox"/>
Civil Rights & Advocacy (incl. women's rights, LGBTQ, equity/diversity/inclusiveness)	<input type="checkbox"/>	<input type="checkbox"/>
Community & Economic Development (incl. business associations, workforce development, unions)	<input type="checkbox"/>	<input type="checkbox"/>
Education (at any level)	<input type="checkbox"/>	<input type="checkbox"/>
Environmental & Animal-related	<input type="checkbox"/>	<input type="checkbox"/>
Health (incl. hospitals, disease-related, women's health, medical research)	<input type="checkbox"/>	<input type="checkbox"/>
International (incl. immigration-related)	<input type="checkbox"/>	<input type="checkbox"/>
Religious & Faith-based	<input type="checkbox"/>	<input type="checkbox"/>
Youth & Family Services	<input type="checkbox"/>	<input type="checkbox"/>
Combination Organizations (incl. United Way, United Jewish Appeal/Jewish Federation)	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify and indicate if "personal" or "family")

Part 2 - Philanthropic Strategy, Causes, & Decisions

24. On this page and the next is a list of possible reasons for engaging in philanthropy, and factors that can affect philanthropic decision-making. Please indicate how important each of the following is when making your personal decisions about your philanthropic activities.

	Very Important	Somewhat Important	Minimally Important	Not at All Important
Having an opportunity to give or volunteer together with my family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Honoring and continuing my family's philanthropic legacy, supporting what they have supported in the past.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting a mission or cause that I believe in, and that fits with my personal values.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting issues that have affected me or my loved ones personally.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing my independence from my parents and family.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting others who share a valued aspect of my identity (e.g., race/ethnicity, gender, sexual orientation, political beliefs, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Addressing the most pressing problems and helping the most disadvantaged people, wherever on the globe.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Addressing problems in my local community or hometown.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping the less fortunate help themselves, helping communities become self-sustaining.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Helping in times of crisis or emergency.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting my alma mater.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Giving to my faith community, or in ways that reflect my faith commitments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Part 2 - Philanthropic Strategy, Causes, & Decisions

25. Please continue to indicate the importance of each of these possible reasons for engaging in philanthropy, and factors that can affect your personal philanthropic decision-making.

	Very Important	Somewhat Important	Minimally Important	Not at All Important
Giving back in return for help I have received in the past.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fulfilling my duty as a person of privilege, to give back to society.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fitting my philanthropy into my pre-determined giving or financial plan.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Coordinating my giving with my political beliefs, and my political activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connecting my philanthropic activities with my professional or career activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeing that my contribution makes a real difference and the organization has a real impact.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having contact with the beneficiaries of the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Being asked to give by my peers, or by others whom I respect.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving some sort of tangible benefit (e.g., tote bag, magazine subscription, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Receiving some sort of sincere recognition or thanks (e.g., thank-you email, name on a donor list or a building, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Having the chance to attend a social event as part of giving.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify)	<input type="text"/>			

Part 2 - Philanthropic Strategy, Causes, & Decisions

28. If you had complete control of your family's giving, what aspects of the current approach would you be sure to retain or enhance? Please think about both the causes or organizations (the "what"), and about the ways of giving (the "how").

29. If you had complete control of your family's giving, what aspects would you do differently, and/or what new ideas would you introduce? Please think about both the causes or organizations (the "what"), and about the ways of giving (the "how").

Part 3 - Philanthropic Information Sources

30. When you are searching for information about a cause or organization that you might support in your personal giving, from where are you most likely to try to get that information? (Click all that apply.)

- Web search (e.g., Google, Yahoo, etc.)
- Organization's website
- Email to the organization
- Phone call to the organization
- Social media (e.g., Facebook, Twitter, YouTube, etc.)
- Blogs
- Charity review/information site (e.g., Guidestar, Charity Navigator, etc.)
- Newspapers
- Television
- Face-to-face meetings/On-site visit
- Friends or peers
- Family members
- Fundraising event
- Third-party review or evaluation (e.g., academic or other studies, watchdog reports, etc.)
- Peer network that I belong to
- Other

Other (please specify)

Part 3 - Philanthropic Information Sources

31. When you are searching for donor education resources, useful information, or other funders with whom to discuss your philanthropy, which of the following organizations do you reach out to? (Click all that apply.)

- Private bank, wealth manager, accountant, other financial institution
- Council on Foundations
- Foundation Center
- National Center for Family Philanthropy
- Association of Small Foundations
- Philanthropy Roundtable
- National Committee for Responsive Philanthropy
- Independent Sector
- Community foundation
- Affinity group (e.g., Grantmakers for Education, GEO, Hispanics in Philanthropy)
- Next generation peer group (e.g., 21/64, Resource Generation)
- Regional Association of Grantmakers
- University/Academic center
- Charity review/information site (e.g., Guidestar, Charity Navigator, etc.)
- Other

Other (please specify)

Part 4 – How You Learned Philanthropy

Next we want to ask about how you learned to do philanthropy in the way you described in the previous sections.

32. Please indicate how important each of the following influences has been in your own process of learning and developing your personal philanthropy (i.e., how you give and volunteer, how much, why, for which causes, etc.).

	Very Important	Somewhat Important	Minimally Important	Not at All Important
Your personal experiences as a donor, volunteer, board member, community leader, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What your parents, grandparents, or other family members taught you directly about philanthropy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your observations of the philanthropic activities of your parents, grandparents, or other family members.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your engagement in a peer network.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your professional training and work experiences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your spiritual journey or involvement in religious activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Something you learned in school.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your personal observations or analysis of the significant need for philanthropy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A major life transition or traumatic experience you went through.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

Part 4 – How You Learned Philanthropy

33. Following is a list of people who could have influenced your learning about philanthropy. Please identify all the ones who have influenced you. (Click all that apply.)

- | | |
|---|---|
| <input type="checkbox"/> Parent(s) | <input type="checkbox"/> Grantee |
| <input type="checkbox"/> Grandparent(s) | <input type="checkbox"/> Other nonprofit leader |
| <input type="checkbox"/> Sibling(s) | <input type="checkbox"/> Religious leader |
| <input type="checkbox"/> Spouse | <input type="checkbox"/> Other community leader |
| <input type="checkbox"/> Close friend(s) | <input type="checkbox"/> Teacher |
| <input type="checkbox"/> Peer(s) | <input type="checkbox"/> Other |
| <input type="checkbox"/> Financial or other adviser | |

Other (please specify)

34. Please describe briefly one or two lessons that you learned from the people who have most influenced your philanthropy. If you wish, include the lessons you would teach your children - whether you have, or are planning to have them yet or not - about how to be a good philanthropist.

Part 5 – Some General Information About You

Almost done! Just a few final yet important informational questions.

35. Please identify your gender.

Female

Male

Other

Other (please specify)

36. Do you identify as a member of the Lesbian, Gay, Bisexual, Transgender, Queer (LGBTQ) community?

Yes

No

37. How do you identify your racial/ethnic heritage? (Click all that apply.)

African American/Black

Arab American

Asian American

Caucasian/White

Latino(a)/Hispanic

Native American or Alaska Native

Native Hawaiian or other Pacific Islander

Mixed Racial/Ethnic Heritage

Other

Other (please specify)

38. What is your current marital/partnership status?

- Married or in a long-term partnership
- Separated
- Widowed
- Single, never married nor in a long-term partnership
- Single, divorced
- Other

Other (please specify)

39. How many children, aged 18 or under, currently live in your household?

- 0
- 1
- 2
- 3
- 4
- More than 4

Part 5 – Some General Information About You

40. In which state is your primary residence?

41. What is your highest level of education?

- High School/GED
- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Professional Degree or Doctoral Degree (e.g., J.D., M.D., Ph.D., Ed.D.)

42. What is your current employment status?

- Full-time employment (40 hours a week or more)
- Part-time employment (less than 40 hours a week)
- Self-employed
- Unemployed
- Student, not also employed
- Stay-at-home parent, not also employed
- Other

Other (please specify)

Part 5 – Some General Information About You

43. What kind of institution do you work for?

- Private business (including self-employed)
- Government or public institution
- Your family foundation
- Other foundation
- Other nonprofit organization
- Other

Other (please specify)

Part 5 – Some General Information About You

44. What is your religious affiliation?

- Agnostic
- Atheist
- Buddhist
- Christian
- Hindu
- Jewish
- Muslim
- Unaffiliated
- Other

Other affiliation (please specify)

45. Apart from weddings and funerals, about how often do you attend religious services?

- More than once a week
- Once a week
- Once a month
- Once a year
- Less than once a year
- Only on special holy days
- Never

46. In political matters, people talk of “the left” and “the right.” Where would you put yourself on this continuum, generally speaking?

- Extremely liberal
- Liberal
- Moderate, Independent
- Conservative
- Extremely conservative
- Don't know

47. Where would you put your parents on this continuum, generally speaking?

- Extremely liberal
- Liberal
- Moderate, Independent
- Conservative
- Extremely conservative
- They have different political views from one another.
- Don't know

Any Final Thoughts?

48. Finally, is there anything else you want to tell us that has not yet been covered in this survey?

Thank You!

Thank you very much for completing this survey. The information you provided is invaluable as we examine these very important questions.

If you have any questions about the survey, please contact either:

**Pattijean McCahill at the Johnson Center (pattijean.mccahill@gvsu.edu) or
Barbara Taylor at 21/64 (barbara@2164.net)**

If you would like to be notified when results of this study are made public, please send an email, with your preferred return email, to info@2164.net.

Finally, as thanks for helping us with this study, we would like to offer you a free copy of a useful philanthropy tool. To receive the gift, please send an email with your name and mailing address to info@2164.net.

PLEASE NOTE: There is no link between this survey site and the email addresses listed above, so by emailing you will only be telling us that you took the survey, not which answers are yours. Sending the emails is, of course, entirely voluntary.

To learn more about our organizations, please visit us at:

**2164.net
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