INTRODUCTION

At Stark Community Foundation, we are here to help you on your personal path of philanthropy. This customized workbook is designed to ask you important questions that will help guide your charitable giving and shape your legacy. Feel free to complete this book all at once or go at your own pace.
These important details of your life will guide your philanthropic plans as well as assist Foundation staff to identify your interests and path to giving.

<table>
<thead>
<tr>
<th>Name:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Address:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of Birth:</td>
<td>Birthplace:</td>
<td></td>
</tr>
<tr>
<td>If you’re not native to Stark County, what brought you here?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other places you’ve lived:</td>
<td></td>
<td></td>
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<tr>
<td>Parents’ Names:</td>
<td></td>
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<tr>
<td>Education (High School, College, etc.):</td>
<td></td>
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<tr>
<td>Employment History/Career Fields:</td>
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<tr>
<td>Civic Memberships:</td>
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<tr>
<td>Religious Affiliations:</td>
<td></td>
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<tr>
<td>Children’s Names and DOBs:</td>
<td></td>
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<tr>
<td>Personal Interests (Hobbies, Cultural Interests, Other Activities):</td>
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</table>
Have you ever taken a step back and analyzed your giving history? We would like to help you recognize your philanthropic patterns and reasons you chose to donate your hard-earned money to great causes.

**Why do you give?** (In just a few words, tell us what inspires you to give back.)

Take a moment and think about how you’ve given back in recent years.

Have you volunteered your time and skills or donated money to support causes you care about?

List the organizations you’ve supported in the past and tell us why.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Reason for Support</th>
<th>Frequency</th>
<th>Program Area</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>ABC Library</em></td>
<td>I’m a former educator</td>
<td>Annually</td>
<td>Children’s literacy</td>
</tr>
</tbody>
</table>

Then, ★ which giving experience gave you the most gratification.

Then, ✗ which giving experience gave you the least satisfaction.

Where do you focus your philanthropy?

- [ ] I support one cause and give to that organization every year.
- [ ] I have a few specific interests or targeted geographic areas that I support.
- [ ] I am passionate about many causes and different locations.
- [ ] I am spontaneous with giving and donate as issues arise.
- [ ] Other:

  1.  
  2.  
  3.  
  4.  
  5.  
  6.  
  7.  
  8.  
  9.  
  10.  

*The first row is an example.*
Not only do the organizations you donated to appreciate your generosity — our community is a better place because you care. The staff at Stark Community Foundation would like to help you realize the power of your giving and the possibilities to change the world in the future.

How do you choose what organizations and projects to support?

☐ I make all giving decisions based on my own interests.

☐ Family members identify organizations and projects.

☐ We review information sent from organizations and choose which projects match our goals and interests.

☐ We develop guidelines for our philanthropy and allow organizations to apply for funding through a request for proposal process.

☐ Other: ____________________________

If you could solve a problem, what would it be?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What has been your MOST meaningful act of generosity?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What has been your LEAST meaningful act of generosity?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

With whom do you discuss your giving decisions?

________________________________________________________________________
Values play a major role in how we live our lives. What are your values? Circle any that apply.

Acceptance  
Access  
Acknowledgment  
Change  
Collaboration  
Commitment  
Communication  
Community  
Compassion  
Conservation  
Creativity  
Democracy  
Dignity  
Diversity  
Education  
Empathy  
Entrepreneurship  
Equality  
Excellence  
Expertise  
Fairness  
Faith  
Family  
Freedom  
Generosity  
Happiness  
Healing  
Honesty  
Humility  
Independence  
Innovation  
Integrity  
Involvement  
Joy  
Justice  
Knowledge  
Leadership  
Loyalty  
Merit  
Opportunity  
Passion  
Peace  

Personal Growth  
Preservation  
Pride  
Privacy  
Responsibility  
Security  
Self-expression  
Self-reliance  
Service  
Simplicity  
Stability  
Tolerance  
Transformation  
Truth  
Wisdom  

Other(s): ____________________  

Now, your top 5.

Remember the ‘Picture Your Legacy’ cards we gave you? Please take a few minutes and complete the brief exercise by choosing three images that instinctively speak to you and that represent how you aspire to fund, operate, invest or be in the world. Then, write what these images evoke or immediately bring to your mind.

<table>
<thead>
<tr>
<th>Image</th>
<th>Significance</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Kids picking fresh vegetables</em></td>
<td>Hands-on education</td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
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</tbody>
</table>

*The first row is an example.*
IDENTIFY YOUR AREAS OF INTEREST

Peruse the list below and circle the areas that pique your interest.

ADULT EDUCATION & LITERACY
• Adult Education & Literacy

ANIMALS
• Animal Welfare & Protection
• Wildlife Protection
• Zoos & Aquariums

ARTS, CULTURE & HUMANITIES
• Historical Preservation
• Literary
• Performance
• Visual

CIVIL RIGHTS & ADVOCACY
• Civic Engagement
• Equal Rights
• Public Policy & Advocacy

COMMUNITY IMPROVEMENT
• Neighborhoods
• Public Spaces

CRIME PREVENTION & LEGAL SERVICES

DISASTER PREPAREDNESS & RELIEF

DISEASES, DISORDERS & MEDICINE
• Medical Research

EDUCATION
• Elementary & Secondary
• Higher Education
• Preschool
• Scholarships
• Specialized Tutoring

EMPLOYMENT
• Job Training & Placement
• Vocational Counseling

ENVIRONMENTAL
• Botanical
• Natural Resources & Conservation
• Recycling
• Water

FAITH-BASED ORGANIZATIONS & RELIGION

FINANCIAL LITERACY

FOOD, AGRICULTURE & NUTRITION
• Agriculture Programs
• Food Pantries & Foodbanks
• Hot Meal Programs
• Meal Delivery

HEALTH & WELLNESS
• Disability
• Health Care Delivery
• Mental Health & Crisis Intervention
• Substance Abuse

HOUSING & SHELTER
• Affordability
• Home Improvement & Repairs
• Homeless Shelters
• Senior Housing
• Subsidized Housing

HUMAN SERVICES
• Accessibility
• Aging
• Children, Youth & Family Services
• Domestic Violence

INTERNATIONAL AFFAIRS & NATIONAL SECURITY

MARINE SCIENCE & OCEANOGRAPHY

PARKS & RECREATION

PHILANTHROPY & VOLUNTEERISM

PHYSICAL & EARTH SCIENCE
• Astronomy
• Biological & Life Sciences
• Chemistry
• Computer Sciences
• Engineering & Technology

SCIENCE & TECHNOLOGY

YOUTH DEVELOPMENT
• After-School Programs
• Early Childhood
• Service Clubs
• Youth Centers

DID WE FORGET ANYTHING?
WRITE IN ADDITIONAL AREAS OF INTEREST:

TRY TO NARROW YOUR LIST DOWN TO YOUR TOP 5:
1. ____________________________
2. ____________________________
3. ____________________________
4. ____________________________
5. ____________________________
SET YOUR GIVING GUIDELINES

Will you divide your giving into percentages that match your identified areas of interest? Or, will you allocate a portion of money for your family members to support their favorite causes?

Example of Areas of Interest
- 50% food pantries and foodbanks
- 30% domestic violence
- 20% current issues

Example of Shared Family Interests
- 50% parents allocate
- 25% child #1
- 25% child #2

Will you divide your giving into percentages that match your identified areas of interest?  [ ] Yes  [ ] No

Or, will you allocate a portion of money for your family members to support their favorite causes?  [ ] Yes  [ ] No

Use these charts below to illustrate your own giving guidelines.

DEFINE YOUR ABSOLUTES

Are you only willing to support organizations within your areas of interest?  [ ] Yes  [ ] No

Will you give to causes outside of your community?  [ ] Yes  [ ] No

Ask yourself, what are your absolutes?

Example: I will only support animal rescue and adoption programs.

Under no circumstances will we support organizations outside of ABC Township.

...
SEE YOUR GIVING IN ACTION

We want your charitable giving to have as much impact as possible. Seeing your generosity’s power can come in many forms. How would you like to see your gifts in action? Check all that interest you.

☐ I would like to see the impact of my gift through a detailed written report along with pictures documenting the success of the organization.

☐ I would like to hear a simple testimonial from a client or staff member of the organization demonstrating the impact of my gift.

☐ I would like to have a conversation with the programmatic staff of the organization or perhaps the Executive Director.

☐ I would like to see first-hand the difference I am making with my generosity through a site visit.

☐ Other:

CREATE YOUR GIVING PLAN

After you’ve completed these unique giving exercises, look back at your responses and start crafting your giving plan or mission statement that details your charitable goals.

Example: Our fund seeks to improve the quality of life for disabled individuals in ABC Township.

We accomplish this by supporting therapeutic programs and agencies that provide independent living assistance.

Now that you’ve completed Your Path of Philanthropy, please return your workbook to Stark Community Foundation.

A member of our Advancement Team will follow up to schedule a time to review your responses and provide guidance on how you can be more strategic in your giving. We can also connect you with causes within your areas of interest and provide analysis on what your gifts accomplished.

Stark Community Foundation
donorservices@starkcf.org
330-454-3426
400 Market Avenue N, Suite 200
Canton, Ohio 44702

Your workbook responses will only be shared with Foundation staff and with successors named in your Fund Agreement.
We are here to help you every step of the way on your personal path of philanthropy.