COREgiving™ Questions Guide

Assessment Question	Follow-up Questions
At this moment in my life, charitable giving is a priority for me.	- If giving is a priority, why does it feel so important right now? - If giving is not a priority, what other factors are impacting this decision?
Charitable giving is a family priority.	- What is our family history of generosity? - What stories stand out? - Why might this be a family priority?
I have a clear understanding of our family's shared philanthropic goals.	- Can we articulate our family giving goals? - How might we begin that conversation?
I like to be directly engaged with any charitable organizations I support.	- Share some of the ways you like to directly engage in charitable organizations. - Share some ways you like to give remotely.
I like to support large, established charitable organizations.	- What makes you feel more comfortable giving to large, established organizations? - What makes you feel less inclined to do so?
I like to collaborate with other funders or non-profits when supporting charitable organizations.	- How do you connect with other funders? - What makes this an exciting collaboration?
I would like my family to devote more time to creating and implementing a giving plan.	- What are your goals for a giving plan? - How would you like to see your family become involved in that plan?
I understand my family's shared values, which directly share our giving.	- Can we name our family's shared core values? - How do these values directly impact our giving?
I understand the charitable mechanisms available to accomplish our family's giving goals.	- Share what tools you prefer when it comes to giving plans. - What resources might help us learn about other mechanisms of giving?

I believe charitable giving should be done primarily at the local level.	- What makes you feel more comfortable giving to local charitable organizations? - What makes you feel less inclined to support local groups?
I understand my family's charitable giving decision-making process and the role each family member has in the process.	- Can we articulate our decision-making process? - What are the key components? - How can people get involved? - What clarity is needed to more clearly understand this process?
I understand how my family will evaluate their charitable giving impact and its success in terms of outcomes/timelines.	- What are our overall philanthropy goals, as individuals and as a family? - How might we want to measure these goals?