



YOUR GIVING GUIDE

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GIVING BACK IS IMPORTANT TO YOU, AND WE THANK YOU FOR YOUR GENEROUS SPIRIT.

We hope this Giving Guide helps you strategically consider your charitable giving both now and into the future. These self-guided exercises are designed to help you determine how best to maximize the impact of your giving and equip you with questions as you engage with charitable organizations.

As you continue on your giving journey, the Community Foundation is here to help. Our mission is to improve the quality of life for all by promoting charitable giving, connecting donors with causes they care about and providing leadership on important community issues. We're simply better together.



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DEFINING YOUR VALUES

What motivates you in your decision-making is defined by your values. Leaning into what you value most can help clarify and lead to the impact you would like to make.

Read through the words below and mark the values that resonate most with you.

- Acceptance
- Adaptability
- Belonging
- Community
- Compassion
- Courage
- Effectiveness
- Equity
- Faith/Spirituality
- Freedom
- Impact
- Innovation
- Integrity
- Justice
- Leadership
- Loyalty
- Obligation
- Opportunity
- Personal Growth
- Pleasure
- Power
- Recognition
- Relationships
- Resilience
- Responsibility
- Risk
- Security
- Self-Reliance
- Sustainability
- Tradition
- Others:





IDENTIFYING YOUR AREAS OF INTEREST

What interests do you want to support or impact through your giving? This exercise seeks to help you intentionally consider the interests that matter most to you. Some may have had a personal effect on you, while others might be topics you believe in or initiatives with which you want to engage.

Read through the words and phrases below and mark those that match your areas of interest.

- Arts & culture
- Animals
- Business development/
Entrepreneurship
- Child care
- Civil rights & advocacy
- Community betterment
- Cultural heritage
- Criminal justice
- Death & dying
- Disability services
- Disaster preparedness & relief
- Diseases, disorders & medicine
- Domestic violence
- Substance abuse
- Economic justice
- Education
- Elder care & support
- Employment/workforce development
- Environment
- Food, agriculture and nutrition
- LGBTQ+ rights
- Girls' & women's causes
- Climate change
- Health & wellbeing
- Historic preservation
- Housing & shelter
- Human services
- Immigrant & refugee services
- International aid
- Leadership development
- Literacy
- Mental health
- Parks & land preservation
- Philanthropy & volunteerism
- Poverty reduction solutions
- Public safety
- Racial equity
- Recreation & sports
- Religion, faith, spirituality
- Reproductive rights
- Science & technology
- Social capital/community
- building Sustainability
- Youth development
- Others:



DEVELOPING YOUR GIVING GUIDELINES

As you contemplate and combine your values and areas of interest, you can form charitable giving guidelines. These guidelines seek to make the most of your giving and help you give strategically in the future. Your giving guidelines serve as guideposts in how you give and can be used as a point of purposeful reflection when approached with funding opportunities.

WHEN DRAFTING YOUR GIVING GUIDELINES...

- 1 Consider the values you have identified and how they relate to your interest areas.
- 2 Your priorities are found where your values and interests intersect.
- 3 And from these priorities, you can begin to formulate your giving guidelines.

MY/OUR GIVING GUIDELINES:



PUTTING YOUR GIVING GUIDELINES INTO ACTION

Before deciding to support an organization, consider how it will help you achieve your charitable giving goals and guidelines by researching and learning more about its impact. Consider touring the facility, speaking directly with staff, volunteering or attending a special event to determine if this is a cause you wish to support.

If the organization's work aligns with your charitable giving guidelines, below are some questions you may wish to ask as you consider providing financial support.

QUESTIONS TO ASK A NONPROFIT ORGANIZATION:



PROGRAM DEVELOPMENT & IMPACT:

Tell me about your organization's mission. Why do you do this work, and what issue does it seek to address?

Who do you serve and how do you know it is making a difference in our community?

Does your organization have a strategic plan? How often is it reviewed and adjusted?

What other organizations do you partner with that address similar issues?

How do you measure the impact of your program(s)? Tell me a story about the impact you have made.

Do you seek input from clients about your programs? How is that feedback incorporated?

Is there anything you wish more people knew about your organization or the issues you are trying to address?

How can I get more involved? _____



FINANCIAL:

What are your funding sources? What is the balance between individual donors, corporate donors, foundations and government or institutional contributors?

What are your most urgent financial needs?

Are your financial statements prepared quarterly for your board? How is the board engaged in financial oversight?

Do you regularly have the resources to cover your budget? Why or why not?

Can I see a copy of your 990 or annual financial audit? _____



GOVERNANCE:

Does your organization have a strategic plan? Tell me about the strategic goals of the organization.

Tell me about your board leadership. Who serves on the board, and what are their areas of expertise?

What is your board nomination process, and do you have term limits?

How often does the board of directors meet?

What is your board's evaluation process for programs and fundraising plans? How frequently are they assessed?

STRATEGIC GIVING SERVICES

YOUR CHARITABLE GIVING IS PART OF YOUR STORY.

The causes and organizations you support highlight your values, interests and commitment to investing in the spaces and places important to you. As you consider the charitable story you want to write, our team is here to help. Whether developing personalized and strategic giving plans, engaging younger generations in charitable conversations or guiding your business to maximize community impact opportunities, we are here to help.

PERSONALIZED STRATEGIC GIVING:

Through a series of tools and exercises, we will walk through the values that mean the most to you and align them with strategic giving opportunities that match your interests. Personalized Strategic Giving is designed for individuals, couples and groups looking to explore how their personal experiences and values have shaped their philosophies on giving and from there form an intentional plan for charitable giving.

FAMILY STRATEGIC GIVING:

Engage with family members across generations in a series of discussions to learn more about your values, current giving and legacy planning. Following your direction and desires, we will facilitate meaningful dialogue to help guide your family's charitable giving intentions.

BUSINESS STRATEGIC GIVING:

We will partner with your team to align and maximize the charitable impact your business would like to achieve.

For more information, contact us:



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