



# Strategic Giving Guidebook

FFTC Center for Personal Philanthropy

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*A Workbook and Planning Tool for Philanthropic  
Individuals and Families*

FOUNDATION FOR  
THE CAROLINAS



## A Guidebook for Personal Giving

It isn't hard to give away money, but doing so wisely requires knowledge and resources. Gifts of any size can provide a meaningful and satisfying experience for you, your family and the organizations that you support. Thoughtful planning prior to giving is worth the investment of time and energy to make a significant impact on causes that you care about.

The purpose of this FFTC guidebook is to help you cultivate a meaningful and intentional giving plan. It offers concepts and examples for:

- ▶ **Considering the individual or family values that influence and inspire your philanthropy**
- ▶ **Developing a personalized giving strategy that will help you achieve your desired impact**
- ▶ **Engaging the next generation and making philanthropy a priority for the whole family**
- ▶ **Helping you find strong, effective nonprofit entities to support through your grantmaking**

Whether you are new to the process or a seasoned philanthropist, we encourage you to use the exercises and worksheets in this guidebook to enrich your personal giving journey. As your philanthropy evolves, remember to revisit these questions and concepts whenever you feel that your path needs adjustment.





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## What does philanthropy mean to you?

*Philanthropy - the desire to promote the welfare of others, expressed especially by the generous donation of money, time and talent to good causes.*

BENEVOLENCE

GENEROSITY

HUMANITARIANISM

LOVING KINDNESS

PUBLIC SPIRITEDNESS

ALTRUISM

SOCIAL CONSCIENCE

BROTHERLY LOVE

MAGNANIMITY

HUMANITY

COMPASSION

KINDHEARTEDNESS

BENEFICENCE

UNSELFISHNESS

KINDNESS

MUNIFICENCE

LARGESSE

BOUNTIFULNESS

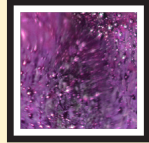
# Crafting a Strategic Giving Plan



## Give with Purpose

Identify and clarify your charitable interests by considering what inspires you to give

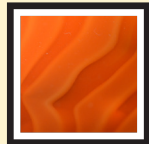
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## Define your Impact

Envision a goal and define your approach

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## Engage your Family

Create a family legacy of philanthropy by involving the next generation in your charitable giving



## Identify your Interests

Identify and clarify your charitable interests by considering what inspires you to give.

Consider the values and beliefs most important to you. What things in your community are you passionate about? What types of issues spark your interest? Which geographic areas do you want to reach? How will you make an impact?

BELIEFS	POPULATION	INTEREST	REACH	IMPACT
Opportunity	Children	Arts & Culture	Local	Change
Compassion	Animals	Humanities	Regional	Solve
Innovation	Immigrants	Environment	National	Construct
Service	Veterans	Health Care	Global	Sustain







## Explore Your Purpose

Using the fields below, identify the values and interests that inspire you to give.

### **BELIEFS**

I want to incorporate these beliefs into my giving:

*Examples: knowledge, integrity, empathy, creativity, faith, generosity, justice*

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### **POPULATION**

I am passionate about serving this population:

*Examples: low-income families, domestic violence victims, refugees, endangered wildlife*

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### **INTEREST**

I want to help this area of interest:

*Examples: homelessness, K-12 education, economic development, religion, medical research, land conservation*

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### **REACH**

I want to support these geographic areas:

*Examples: my neighborhood, the Charlotte-Metro region, anywhere in the U.S.*

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### **IMPACT**

The specific impact I want to make is to:

*Examples: improve child literacy rates, provide affordable housing, prevent drug and alcohol abuse, preserve cultural heritage*

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## Purpose Statement

Some individuals and families choose to develop a short purpose statement that broadly represents their charitable intent. A purpose statement can be helpful in guiding decisions about giving by clarifying your goals and priorities. Purpose statements can and should be reviewed periodically to ensure they continue to meet the changing needs of your interest areas.

### Sample interview questions:

*“Our family’s goal is to support and inspire creativity in the communities in which we live.”*

*“Our family seeks to bring opportunity to the disadvantaged, strengthen the bond of families, and improve the quality of people’s lives.”*

Reflecting on the charitable interests you recorded on the previous page, draft your own purpose statement below.

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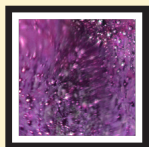
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## Envision a goal and define your approach

Consider the possible strategies for giving with greater impact.

▶ **Long-term or short-term**

Would you prefer to fund a six-month project or fund an endowment to ensure the long-term sustainability of an organization?

▶ **Capital or programmatic**

Should funding provide for a permanent structure, such as a building, or general programming costs?

▶ **Large, one-time gift, or multiple, smaller gifts**

Think about your impact. Will one large gift serve a greater need than multiple, smaller gifts?

▶ **Restricted or unrestricted**

Would you like to restrict funding to specific categories or apply grants where most needed?

What approach will you take?

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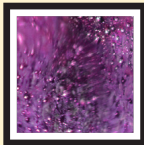
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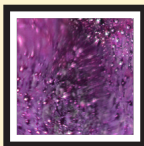
# Define Your Impact



## Align your philanthropic goals with your charitable vehicle

Maximum Flexibility	Specific Interest	Targeted Organization	Educational Purpose	Community Needs	Permanent Fund	Future Impact
<ul style="list-style-type: none"> <li>▶ Support broad charitable purposes</li> <li>▶ 100% of principal available for grantmaking</li> </ul>	<ul style="list-style-type: none"> <li>▶ Benefit organizations that fall within a specific charitable category rather than a particular organization</li> </ul>	<ul style="list-style-type: none"> <li>▶ Benefit one or more specified charitable organizations</li> </ul>	<ul style="list-style-type: none"> <li>▶ Provide scholarships for K-12, undergraduate and graduate levels</li> <li>▶ Donors may recommend an academic focus and eligibility criteria</li> </ul>	<ul style="list-style-type: none"> <li>▶ Give FFTC discretion to meet changing or unforeseen charitable needs in the communities it serves through unrestricted gifts</li> </ul>	<ul style="list-style-type: none"> <li>▶ Support broad charitable purposes</li> <li>▶ Preserve principal and grow in perpetuity</li> <li>▶ Only the spendable amount is available for grantmaking</li> </ul>	<ul style="list-style-type: none"> <li>▶ Create a legacy for future generations by including philanthropy in your estate plans</li> </ul>
<b>FFTC Vehicles for Giving</b>						
<b>Non-Endowed Donor Advised Fund</b>	<b>Field of Interest Fund</b>	<b>Designated Fund</b>	<b>Scholarship Fund</b>	<b>Community Impact Fund</b>	<b>Endowed Donor Advised Fund</b>	<b>Planned Gift (all fund types)</b>

# Define Your Impact



## Make an impact beyond your lifetime

A key component of your philanthropic strategy is considering the impact you wish to make after your lifetime. You can support organizations and causes that are important to you – while simultaneously taking care of loved ones – by establishing a planned gift.

FFTC works with you and your professional advisors to help structure estate gifts that match your personal priorities and tax planning needs today, while maximizing your impact for generations to come.

A variety of tools can be used to establish a planned gift:

- ▶ **Wills or Trusts**
- ▶ **Retirement Plan Assets**
- ▶ **Life Insurance Policies**

### Sample Bequest Language

The following is sample bequest language that can be used to include a planned gift to Foundation For The Carolinas in your estate plan. Always consult your attorney before executing a new will or other estate planning document.

“I give to Foundation For The Carolinas, a North Carolina nonprofit corporation, the sum of \_\_\_\_\_ Dollars and no/100 (\$\_\_\_\_\_.00), in cash or in-kind, [could include a stated percentage or fraction of estate instead] for the benefit of [John and Jane Smith Endowed Fund], an endowed fund to be created pursuant to that certain fund agreement executed by me [and/or my spouse] during my/our lifetime(s).”

### Create your legacy

Choose your gift vehicle



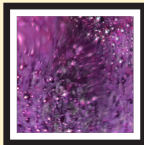
Establish your planned gift



Document your charitable intent



Make an impact in your community



## How can you support organizations or causes beyond donating financial resources?

### ▶ Offer In-Kind Donations

Donate gently-used, functional technology, supplies, office furniture and other necessary operational items to supplement financial gifts.

### ▶ Give Time and Talent

Offer your time and skills as a volunteer to help build capacity and further the mission of your favorite charity.

### ▶ Advocate and Spread the Word

Increase the visibility of organizations and causes you care about by educating your personal, business and community networks.

### ▶ Request a Matching Gift

Ask your employer about matching programs, which can often double your impact. Many companies will match charitable contributions dollar for dollar.

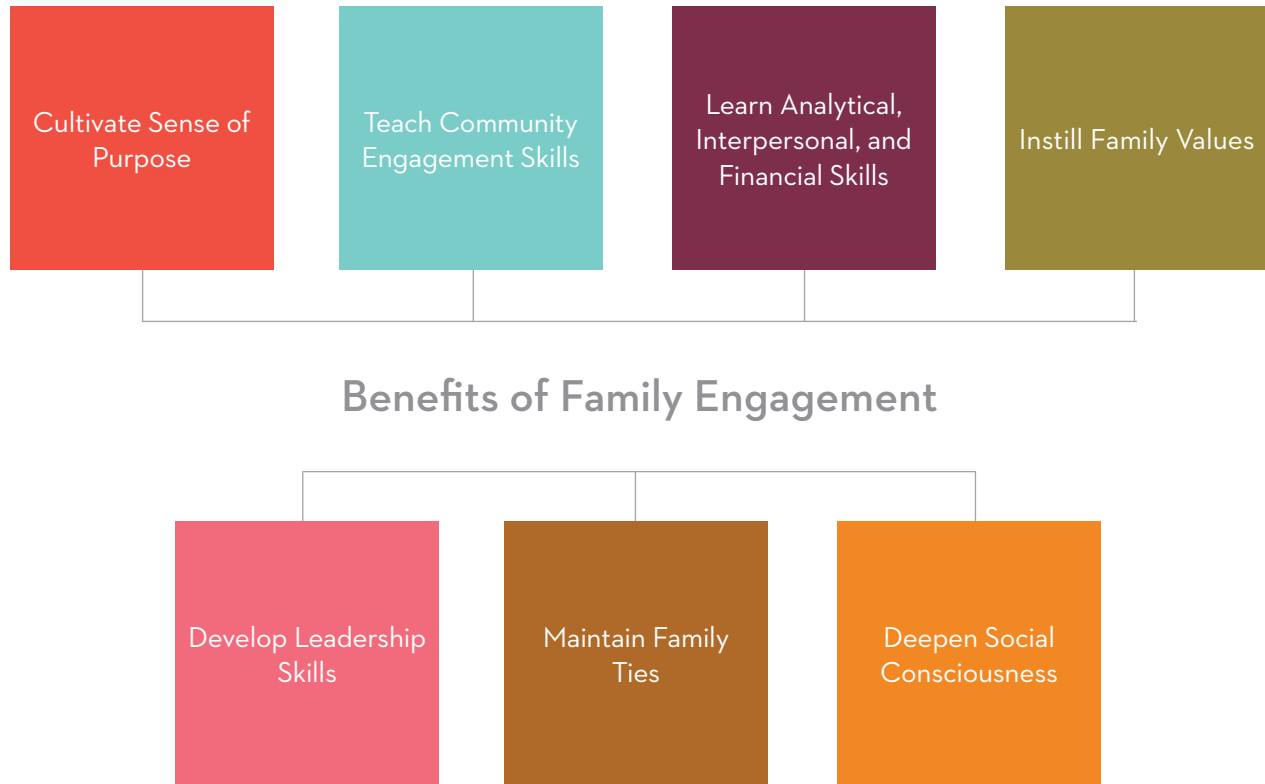
### ▶ Encourage Collaboration

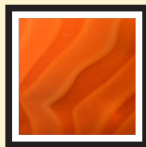
Encourage organizations to partner with other agencies working toward similar goals. By leveraging one another, they can expand their reach and make a bigger impact.





# Engage Your Family





## Instill Philanthropy at Every Age



Young Children

- ▶ Model generosity and respect for others – let your children see you doing good
- ▶ Praise acts of kindness
- ▶ Make it a routine to donate used toys, games, books and clothes
- ▶ Create a sharing jar and save loose change to buy something for someone else – a toy, a pair of shoes, etc.
- ▶ Say “thank you” often
- ▶ Ask a daily question: “What are you most thankful for today?”
- ▶ Read books about generosity
- ▶ Help your child distinguish needs from wants; when your child asks for something specific, respond by asking if that item is a want or a need



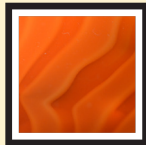
School-Aged Children

- ▶ Volunteer together
- ▶ Introduce saving as a family toward a specific goal; save up to go out for a special treat (i.e., ice cream)
- ▶ Give year-round
- ▶ Include children in grantmaking decisions
- ▶ Set up a “spend, save, give” allowance policy
- ▶ Donate school supplies to children in need
- ▶ Tell family stories that illustrate your family values
- ▶ Create a rule of thumb that your child must give away one gently-used toy for every new toy received



Teens and Young Adults

- ▶ Teach financial education – talk about the value of saving and spending responsibly, and help teens make a monthly budget
- ▶ Match philanthropic savings
- ▶ Encourage purpose-driven activities
- ▶ Let them determine and pursue their own philanthropic interests
- ▶ Talk openly about your philanthropic experiences
- ▶ Make a list of issues affecting your community and discuss how your family could help
- ▶ Help teens and young adults prioritize in general – school work, extracurriculars, sports, friends, etc.; this will help them prioritize when making money decisions



## Ways Youth and Teens can Become Involved

### SERVICE CLUBS

Join a local club that promotes and organizes community service activities for youth.

### PROJECTS

Set aside a work day with friends/family for a project in your community that will improve some aspect of life for others. Visit [www.DoSomething.org](http://www.DoSomething.org) for ideas.

### ATHLETIC RACES

Train and participate in a 5K walk/run in support of your favorite nonprofit. Find local fundraisers at [www.EventBrite.com](http://www.EventBrite.com) by searching the Charity & Causes category, then filtering by Race.

### VOLUNTEERING

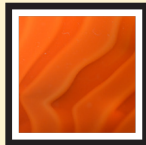
Research nonprofits in your area and contact them about volunteer programs. Search for local opportunities and ideas on how to get involved at [www.SHARECharlotte.org](http://www.SHARECharlotte.org).

### GIVE-BACK PARTIES

Host your own birthday party where invited guests are asked to bring gifts for an organization with specific needs. Visit [www.daymaker.com](http://www.daymaker.com) and read about their Party & Give program.

### MINI-GRANTS

Look for funding opportunities and projects that funnel small gifts for big impact, and give what you can. Visit [www.DonorsChoose.org](http://www.DonorsChoose.org) for examples and opportunities near you. You can make a difference with gifts of any size.



## Service Project Ideas

Discover a new interest, make a friend, explore a potential career path and make a difference in your community one project at a time. Brainstorm with parents, friends and teachers about ways to serve those in need in your community. Below are some sample service project ideas:

▶ **Military Service Personnel**

Write letters to active military personnel to thank them for their service

▶ **Seniors**

Help prepare and deliver meals to those confined to home

▶ **Homeless Community**

Prepare care packages for homeless individuals that include water, toothbrushes, non-perishable snacks, first-aid supplies and socks

▶ **Animals**

Collect pet food and supplies for sheltered animals

▶ **Children and Families**

Fill a backpack with school supplies and age-appropriate books

▶ **Disaster Survivors**

Gather blankets or water bottles for victims in shelters when disaster strikes

### TIPS

- ▶ Ask your school guidance counselor about opportunities to get involved
- ▶ Call your local Social Services agency to learn about the needs in your neighborhood
- ▶ Find faith community organizations that facilitate mission projects







## FFTC Profiles in Family Philanthropy

### Mayor Vi Lyles

During her childhood, Mayor Vi Lyles' parents Robert and Mary Taylor modeled generosity through tithing and supporting their church. Committed to making Charlotte a vibrant city, Vi continued this tradition of giving.

Early in her career, Vi realized that contributions of time and talent were as important as financial contributions. She also recognized the value in contributing what you can when you can, and noted that giving capacity often changes over time.

Over the years, she ensured that giving "became a habit," supporting nonprofits in the fields of education, culture, human services and more. She intentionally passed these values on to her son Kwame and daughter Aisha.

For Vi's 60th birthday, her daughter opened an FFTC Donor Advised Fund to formalize her mother's long legacy of generosity and to pay tribute to the local community her mother continues to impact.





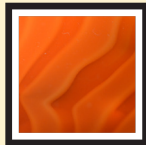
## FFTC Profiles in Family Philanthropy

### Alpha & Omega Foundation

Philanthropic visionary Pete Keane came to FFTC in 2005 with a goal of engaging his family, including two then-teenage daughters, in the process of giving. Initially intending to create a private foundation, Pete opted to establish an FFTC Donor Advised Fund for ease of administration.

Upon creating the fund, he and his former wife, Linda Turner, formed an advisory board that includes friends and family. The board convenes twice a year and receives FFTC Custom Services to facilitate an annual grant program. Pete and Linda's daughters, both recently married, will join their parents on the board and continue the tradition of giving.





## FFTC Profiles in Family Philanthropy

### John & Claire Tate

During his lifetime, Jack Tate played a key role in the development of many organizations that serve local children today, such as Child Care Resources and the local affiliate of Communities in Schools. Jack also established an FFTC Scholarship Fund for students served by Communities in Schools and held a seat on FFTC's Governing Board. His first wife, Dolly, was a child advocate and one of the founders of the Council For Children. After her death, Jack later married Marjorie, who served as founding director of Child Care Resources.

Significant supporters for education in the Charlotte area, the Tates' enthusiasm for giving continued to the next generation. Jack and Dolly's son John and his wife Claire established an FFTC Donor Advised Fund in 1987. John, who has served on many community boards, and Claire, a past FFTC Governing Board member and co-founder of Women's Impact Fund, have instilled the family's legacy of giving in their children, Austin and Bright who, now grown, give generously along with their own families.





## FFTC Profiles in Family Philanthropy

### Katherine & Jane McKay

The McKay sisters, Katherine and Jane, valued education, devoting their lives to teaching children in Scotland County. Katherine taught for 35 years, and Jane was the librarian for the Scotland County School System. The sisters shared strong Christian values and a love of cats. They led frugal lifestyles, which allowed them to accumulate a significant estate. Both sisters passed away in 2016.

Their passion for education and other causes will endure thanks to a Scholarship Fund and Field of Interest Fund established through a planned gift to FFTC. Their legacy will provide assistance to students in Scotland County and beyond and will support a wide variety of other causes they held dear.







## FFTC Profiles in Family Philanthropy

### Marcia Tillotson & Sharon Blalock

Marcia Tillotson has always made philanthropy a priority when advising clients over her 30-year career in wealth management, and that includes partnering with Foundation For The Carolinas for charitably-minded clients served by her financial advisory practice.

Marcia and her wife Sharon, long-time contributors to the Charlotte Lesbian & Gay Fund at FFTC, established their own FFTC Donor Advised Fund with the goal of funding philanthropic goals post-retirement. Sharon and Marcia have made plans for their heirs to serve as successor fund advisors and hope that will allow them to experience the joy of giving.





## Make a greater impact by embracing differences

Navigating family dynamics in the context of philanthropy can be challenging at times. However, diverse perspectives bring new ideas, and collaboration can help families achieve their unique charitable goals.

Below are some tips to establish a shared vision:

▶ **Stay focused on the charitable values that bring your family together**

While family members may not agree on everything, they often have core values that inform their philanthropic vision. By defining and documenting a common mission, you can make a powerful impact.

▶ **Talk openly about differences**

Individuals may have different priorities, wealth and spiritual beliefs, leading to distinct philosophies regarding philanthropy. This can be an opportunity to foster understanding, with the goal of finding common charitable causes.

▶ **Plan ahead for life's transitions**

All families experience major events – such as births, marriages and deaths – that affect priorities and perspectives on charitable giving. Be sure to consider these issues when creating a philanthropic plan.





## Family Engagement Exercises

Below are six questions to inspire family discussion on the topic of giving:

What is your first memory of generosity?

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What issues matter most to you?

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What values do you feel you share with your family?

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

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If you had \$1 million to give away today, where would you give it?

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What do you like about your community and how do you think it could be improved?

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## 4 Steps to Making Values-Based Decisions

For novice philanthropists, the best way to start is by identifying core values, issues and interests that resonate the most. This exercise encourages participants to reflect on their personal values and develop the courage to act on them on behalf of the common good. While designed for children and young adults, this exercise is suitable for all ages.

Complete the following exercise to inform your decisions:

### Step 1: Identify Values

Circle every word on the list below that resonates with you personally. Do not overthink your selections. If you think of a value that is not on the list, write it in the space provided and circle it.

Acceptance	Education	Honesty	Responsibility
Achievement	Encouragement	Intelligence	Safety
Appreciation	Equality	Joy	Service
Beauty	Faith	Kindness	Teamwork
Communication	Family	Love	Trustworthiness
Compassion	Friendships	Loyalty	Wisdom
Courage	Freedom	Opportunity	_____
Creativity	Generosity	Patience	_____
Dependability	Hard Work	Peace	_____
Diversity	Health	Respect	_____



## 4 Steps to Making Values-Based Decisions

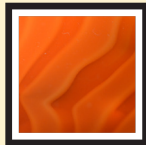
### Step 2: Recognize Areas of Concern

Circle the causes or issue areas you care about. Where would you like to see change?

Animals	Human Rights	Seniors
Arts & Culture	Hunger	Substance Abuse
Children	Literacy	Veterans
Disability Care	LGBTQ Community	Water Quality
Domestic Violence	Mental Health	_____
Education	Natural Disasters	_____
Environment	Poverty	_____
Health Care	Refugees	_____
Homelessness	Religion	_____







## Resources for Family Philanthropy

### **National Center for Family Philanthropy (NCFP)**

Promotes philanthropic values, vision and excellence across generations of donors and donor families. Provides research and written resources for families who give. For more information, visit [www.ncfp.org](http://www.ncfp.org).

### **21/64**

Provides tools to help families have conversations about values and charitable giving. Offers consulting services to families and family advisors. For more information, visit [www.2164.net](http://www.2164.net).

### **Share Save Spend®**

Provides tools to help parents teach healthy financial habits and values. For more information, visit [www.sharesavespend.com](http://www.sharesavespend.com).

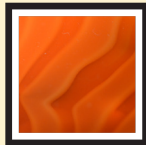
### **Learning To Give**

Provides free resources and lesson plans for parents and others to educate youth about philanthropy and civic engagement. For more information, visit [www.learningtogive.org](http://www.learningtogive.org).

### **Daymaker**

Offers unique and meaningful opportunities to give year-round to keep kids engaged and excited about helping others. For more information, visit [www.daymaker.com](http://www.daymaker.com).





## Recommended Reading List

### Young Children

- A Good Night for Mr. Coleman*, by Kathy Izard (2019)  
*Aldo Ice Cream*, by Johanna Hurwitz (1989)  
*Giving*, by Shirley Hughes (1993)  
*Maddi's Fridge*, by Lois Brandt (2014)  
*My Most Favorite Thing*, by Nicola Moon (2001)  
*Raising Yoder's Barn*, by Jane Yolen (1998)  
*Ribbon Rescue*, by Robert Munsch (1999)  
*The Mitten Tree*, by Candace Christiansen (1997)  
*Uncle Willie and the Soup Kitchen*, by DyAnne DiSalvo-Ryan (1991)

### Youth and Teens

- The Giving Book: Open the Door to a Lifetime of Giving*, by Ellen Sabin (2004)  
*How to Be an Everyday Philanthropist*, by Nicole Bouchard Boles (2009)  
*Seedfolks*, by Paul Fleischman (1997)

### Adults

- Best Intentions: Ensuring your Estate Plan Delivers Both Wealth and Wisdom*, by Colleen Barney (2002)  
*Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy*, by Tracy Gary (2007)  
*Money and the Meaning of Life*, by Jacob Needleman (1994)  
"Raising Charitable Children in Charitable Families," by Ellen Sabin, NCFP (2018)  
*The Giving Family: Raising our Children to Help Others*, by Susan Crites Price (2001)  
*The Opposite of Spoiled: Raising Kids Who Are Grounded, Generous, and Smart About Money*, by Ron Lieber (2015)  
*The Soul of Money*, by Lynne Twist (2017)  
*Wealth in Families*, by Charles Collier (2012)

# Toolkit for Evaluating Nonprofits

## 10 Things to Look for in an Effective Nonprofit

### ▶ Clear Mission

The mission should articulate what the organization seeks to accomplish and why its purpose is important.

### ▶ Programming

Effective programs are clear and sustainable, and they exist to achieve the organization's stated mission.

### ▶ Ongoing Evaluation

Does the organization measure results against outcomes? Is there a process in place for making program revisions?

### ▶ Strong Leadership

Look for diversity of skills, education, training and experience in leadership and staffing.

### ▶ Financial Transparency

Current financial information such as the IRS Form 990, annual financial statements, budgets and fundraising goals should be easily accessible, and are often available on the organization's website.

### ▶ Annual Reports

Annual reports highlight a nonprofit's impact and accomplishments over the past year, and are often published on an organization's website. What were the results of their work and what difference did it make?

### ▶ Board & Governance

Strong nonprofit boards have regular meetings, term limits, written responsibilities and conflict policies. Does board membership reflect the skills needed to oversee a successful organization?

### ▶ Strategic Planning

A strategic plan should be in place and used. Strategic planning goals should be measured by staff and board through periodic assessments.

### ▶ Community Partnerships

The most effective nonprofits have collaborative relationships with other organizations in the community. By working together toward common goals, pooling resources and implementing services and procedures, these partnerships achieve maximum impact.

### ▶ Stakeholder Engagement

Effective organizations involve, inspire, inform and seek feedback from all constituents, including donors, volunteers and staff.

### Tip: Deciphering a Form 990

- ▶ A Form 990 is an annual information return that is required to be filed by most tax-exempt organizations.
- ▶ Liabilities to Assets Ratio: Are liabilities 50% or less of the assets? If not, is there a reason why this is the case?
- ▶ Months of Liquid Net Assets: How long could an organization operate if no additional resources came in the door?
- ▶ Revenue Composition: What are the different sources of revenue? A balance of three or more income sources is ideal.

# Toolkit for Evaluating Nonprofits

## Due Diligence Resources

▶ **GuideStar**

An information service that maintains data about every IRS-registered nonprofit, including mission, legitimacy, impact, reputation, finances, programs, transparency, governance and more. For more information, visit [www.guidestar.org](http://www.guidestar.org).

▶ **Charity Navigator**

An information service that analyzes and rates charities on a numbers-based system. For more information, visit [www.charitynavigator.org](http://www.charitynavigator.org).

▶ **Give.org**

A Better Business Bureau Wise Giving Alliance organization that reports on and monitors nonprofit organizations. For more information, visit [www.Give.org](http://www.Give.org).

▶ **MyPhilanthropedia.org**

A division of GuideStar, this site provides independent research and rankings of a nonprofit's impact as observed by sector experts. For more information, visit [www.myphilanthropedia.org](http://www.myphilanthropedia.org).

# Toolkit for Evaluating Nonprofits

## Site Visits and Volunteering

### Benefits of Site Visits and Volunteering

- ▶ Get to know staff and work of the organization firsthand
- ▶ Observe programs in action and interact with individuals served by the organization
- ▶ Better understand how you can best help the organization
- ▶ Evaluate how a grant already awarded is being put to use
- ▶ Involve family members in philanthropy

### Virtual Site Visits

- ▶ In-person site visits are ideal. However, for organizations that aren't local, consider conducting a virtual site visit. Virtual site visits allow you to use web-based audio and visual connections to facilitate a live, face-to-face interaction with potential grantees.
- ▶ Note that virtual site visits may require more advanced planning on your part and on the part of the organization. For example, you will want to be sure to give yourself adequate time for researching and familiarizing yourself with the right technology platform.

### Regional Resources for Volunteer Opportunities

- ▶ **www.ShareCharlotte.org**  
SHARE Charlotte, a partner to more than 400 nonprofits, provides the local community with a variety of volunteer opportunities. Search for opportunities by who it helps, desired skill set and more.
- ▶ **www.HandsOnCharlotte.org**  
United Way's Hands On Charlotte offers a calendar of volunteer opportunities and service projects for individuals and groups in and around the Charlotte area.

#### Tip: Notetaking

Taking notes about your interactions with potential grantees is a practice that will help you make giving decisions now and in the future.

- ▶ Record things that stand out to you, such as what you liked or didn't like about your experience with a particular organization.
- ▶ Write down the organization's responses to questions you ask during a site visit.

# Toolkit for Evaluating Nonprofits

## Engage Nonprofit Leaders Directly

### Questions to help you choose the right nonprofits to support

- ▶ What is your most successful program and why?
- ▶ What are the key issues you are trying to solve?
- ▶ Do you have a strategic plan? What priorities will help you achieve it? What obstacles stand in your way?
- ▶ What is one thing you wish more people knew about your organization?
- ▶ What are your sources of funding?
- ▶ What are your greatest needs?
- ▶ How do you engage funders and keep them up-to-date on your work?
- ▶ How do volunteers enhance staff efforts?
- ▶ Describe your approach to managing shifting priorities. Can you provide an example of your organization's adaptability?
- ▶ How do you work with other organizations addressing similar issues?







## Your Partners in Philanthropy

*Foundation For The Carolinas inspires philanthropy and empowers individuals to create a better community.*

Since 1958, Foundation For The Carolinas has served as a catalyst for charitable good, connecting individuals and families to philanthropic needs and opportunities across the region and beyond. A community foundation deeply dedicated to the collective strength of communities, we work in close partnership with donors, civic leaders, businesses, and nonprofits to achieve a wide variety of charitable objectives and to inspire philanthropy that will benefit generations to come.

The Center for Personal Philanthropy helps families and individuals define and achieve their charitable goals by providing expert advice, outstanding services and highly personalized philanthropic solutions. Through a range of charitable fund options, we simplify the process of giving, maximize tax benefits, and amplify the impact of every gift.

Our team of experienced professionals is equipped to help you evaluate and implement your unique philanthropic strategies, and maximize your impact through charitable giving.

We hope you found this guidebook helpful. For comments, questions, or to learn more about FFTC's philanthropic solutions, please contact us at [philanthropy@fftc.org](mailto:philanthropy@fftc.org).

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