



Helping Your Donor Create a Giving Plan

Brenda Cummins, Director of Philanthropic Services, Cleveland Foundation

Jason Weiner, Philanthropic Advisor, Cleveland Foundation

September 26, 2024

Today's Agenda

- Determining what your donors care about most
 - Exploring Values and Causes and a Personal Mission Statement
- Identifying and Evaluating Nonprofit Organizations
 - What tools are available to help?
- Exploring Impact
 - Which Needle(s) Are You Hoping to Move?
- Next Steps: Developing and Maintaining a Relationship
 - Communication, Learnings, Re-Evaluation

Exploring Values

- What are values and why are they important?
- What are YOUR values?
- How do we prioritize values?



Exploring Causes

How do we define causes + issues?

What causes / issues do YOU care about the most?

How do we prioritize the causes + issues we care most about?



Creating a Mission Statement

What is a mission statement?

- ✓ A formal summary of the aims and values of a company, organization or individual
- ✓ A statement that includes a clear and concise action, a target population and a measurable outcome
- ✓ A statement that describes the difference you want to make in the world

I support organizations that mentor and tutor low-income youth to increase college graduation rates

I believe in funding organizations that educate and empower immigrants to enter the workforce

Examples of Mission Statements: Tom

Tom is a young professional who participated in the Cleveland Foundation's "Foundations for Philanthropy" program:

- Tom's Values: Family, Honesty, Success
- Tom's Causes: Digital Access, Corporate Responsibility
- Tom's Mission Statement: Empower people with disabilities to achieve success through education, independence and vocational preparedness

Examples of Mission Statements: Elizabeth

Elizabeth is a recent college graduate who also participated in the Cleveland Foundation's "Foundations for Philanthropy" program:

- Elizabeth's Values: Family, Success, Creativity
- Elizabeth's Causes: Economic Self-Sufficiency
- Elizabeth's Mission Statement: My mission is to creatively leverage arts and culture to promote economic and community development

Identifying Non-profits that fit the mission

- Candid's Guidestar – Charity Navigator
- On-line research around the focus area.
 - Annual Reports
 - Websites
- Community Foundation Resources
- Crain's Giving Guide and other local magazines and news sources that focus on non-profits
- Events
- Site Visits

Evaluating Non-Profits

Alignment

- Does this match the donor's focus area?
- Does the work reflect the values and mission statement?

Collaboration

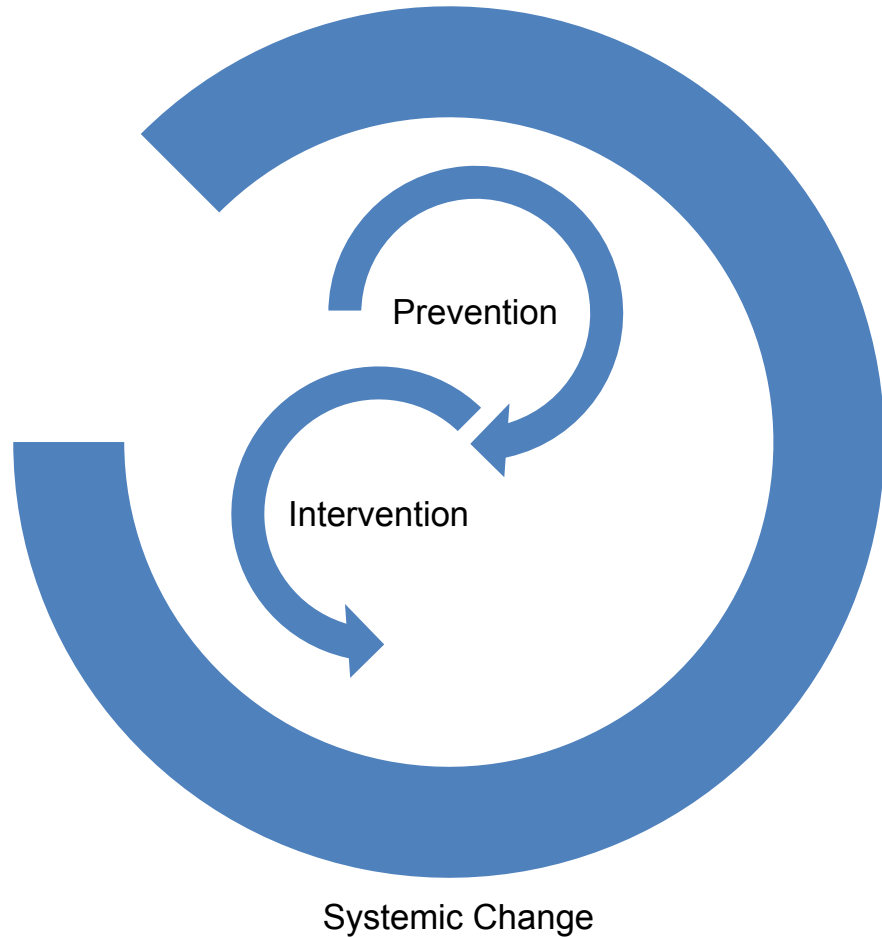
- What constituencies and partnerships has it established
- What other organizations are doing similar work?

Capacity and Structure

- Does the organization have the leadership, staff and means to carry out its mission?
- Is there a strong business model and ongoing attention to sustainability?
- Financial and Legal Compliance
 - Verifying non-profit status
 - Reviewing 990s



Impact



Impact

- Does the organization clearly define its measurement and outcomes?
- How does the work address individuals vs. systems change?

Example Issue: Hunger

- Intervention: a direct service effort to feed the hungry, providing food or assistance in accessing food
- Prevention: an education program that helps improve job skills to access a quality job and access food for your family
- Education and Research: advance the understanding of the issue
- Systemic Change: supporting advocacy to look at laws impacting access to food and encouraging legislative action

Trust-Based Giving: General operating and unrestricted support to allow the non-profit to determine where best they can make the most impact.

Stewardship and Reflecting on Giving

Reflecting on the process

Keeping In Touch

- The donor's role
- The organization's role

Re-evaluating the plan every 2-3 years

“They are not your donors;
you are
one of their charities.”

— Mark Phillips, Bluefrog



Questions?