

PRODUCT PREVIEW

Donor PROFILE & Giving PLAN

SITUATION

When a donor wishes to reflect more thoughtfully on his/her giving, the *Donor Profile & Giving Plan* offers a process to do so. It can help giving become more strategic, intentional, and focused. This tool can be used to analyze one's past giving and help shape a future course. It is particularly helpful to a couple that wishes to jointly reflect on what they want to accomplish and get more complete involvement of both parties. It can also be used as a periodic checkup to see if one's giving is aligned with one's passion and calling. The *Plan* portion provides a roadmap for the donor who tends to be more spontaneous, and adds discipline to his/her philanthropy.

MARKET

This resource is designed for active donors who seek a more thoughtful and reflective strategy in their giving. Donors may be individuals, families, small or new foundations, contributors to donor-advised funds, and proprietors of closely held businesses. No minimum annual giving threshold is required or recommended.

DESCRIPTION

This product contains two parts. The *Donor Profile* starts with a giving mission statement that succinctly states the donor's purpose in giving. It goes on to describe a donor or couple's giving history, current interests, regional focus, degree of engagement with supported organizations, interest in making in-kind contributions, preferred nonprofit operating style, acceptable business function of gift, and other factors. This profile is then used to develop a *Giving Plan* that identifies organizations within sectors of interest and amounts to be given through the year. The plan offers the ability to track "budget vs. actual" on an ongoing basis. The product includes several assessment instruments, worksheets, and discussion exercises to help donors develop their mission statement and create their profile.

PRODUCT USES

Likely uses include helping donors:

1. Develop a clear understanding of what they want to accomplish as a donor. Clarify giving goals.
2. Identify differences of opinion within a couple, and resolve them.
3. Articulate more precisely areas of passion, thus allowing donors to "say no" to misaligned opportunities.
4. Strategically focus giving; reduce the number of supported organizations.
5. Add discipline to philanthropy.

DELIVERABLES & FEES

The report is a manageable 15-20 pages in length and contains numerous graphs and charts. All results from the tests are added for reference. For couples, the results from both parties are blended for a "family" *Donor Profile and Giving Plan* (unless separate reports are requested). A minimum of two meetings with the donors is included, one to set up the process, and another to present the results. The fee is \$4,000 to \$5,000 depending on complexity, for all testing, exercises, consultation, evaluation, interpretation, recommendations, report writing, and presentation. A blended "family" profile for a couple costs an additional \$1,000. Out-of-pocket travel expenses are reimbursable.

CONTACT US

For more information on the *Donor Profile and Giving Plan* or other products and services for committed and reflective philanthropists, please contact us.

BENEFITS

- ✓ Clarifies giving goals; know what's in and what's out!
- ✓ Provides basis to be more strategic in giving; enables greater focus if needed.
- ✓ Facilitates dialog about philanthropy among couples.
- ✓ Creates a written plan to guide for the year (easily revised for next year).

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Maximizing the Good of Giving

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