



GIVING GUIDE



COMMUNITY FOUNDATION
TAMPA BAY

GIVING BACK **is important to you.**

Perhaps an organization influenced your life, you're passionate about a specific cause, take special notice of the needs in your community or simply want to create a legacy for future generations. Most importantly, you want your charitable giving to have as much impact as possible.

Your motivation for giving is important, and the key to a rewarding experience is determining your values and matching them to your gifts.

Giving away money is easy; giving it away wisely requires discernment. Well-placed gifts, regardless of size, can make a difference and create an extremely satisfying experience for you. Effective and meaningful giving requires thoughtfulness and careful planning but is well-worth the investment of time and energy needed to make a significant impact on the causes you care about.

This Giving Guide is designed to help determine what is most important to you and provide exercises that:

- » Define your values
- » Identify your interest areas
- » Create a personal or family mission statement
- » Help you make strategic decisions about your charitable giving

By aligning charitable giving and volunteering with your values, life experiences and interests, you can make a meaningful difference.



Defining Your VALUES & BELIEFS

Values are the characteristics we hold in highest esteem, what we hold of greatest personal importance and worth. They reflect our core principles and how we live our lives.



Put a check mark beside the values that resonate with you, and then list the three that are most important. If family members are involved with your charitable giving, encourage them to talk about their personal values as well.

- | | | |
|--|---------------------------------------|---|
| <input type="checkbox"/> Acceptance | <input type="checkbox"/> Healing | <input type="checkbox"/> Patience |
| <input type="checkbox"/> Beauty | <input type="checkbox"/> Honesty | <input type="checkbox"/> Patriotism |
| <input type="checkbox"/> Commitment | <input type="checkbox"/> Humility | <input type="checkbox"/> Peace |
| <input type="checkbox"/> Community | <input type="checkbox"/> Independence | <input type="checkbox"/> Personal liberty |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Innovation | <input type="checkbox"/> Preservation |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Integrity | <input type="checkbox"/> Respect |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Justice | <input type="checkbox"/> Responsibility |
| <input type="checkbox"/> Democracy | <input type="checkbox"/> Joy | <input type="checkbox"/> Service |
| <input type="checkbox"/> Determination | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Teamwork |
| <input type="checkbox"/> Discipline | <input type="checkbox"/> Leadership | <input type="checkbox"/> Tradition |
| <input type="checkbox"/> Dignity | <input type="checkbox"/> Love | <input type="checkbox"/> Work ethic |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Loyalty | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Empowerment | <input type="checkbox"/> Opportunity | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Equality | | |
| <input type="checkbox"/> Excellence | | |
| <input type="checkbox"/> Faith | | |
| <input type="checkbox"/> Freedom | | |
| <input type="checkbox"/> Free enterprise | | |
| <input type="checkbox"/> Generosity | | |
| <input type="checkbox"/> Harmony | | |
- My/Our top three values are:
- _____
- _____
- _____

Identifying Your INTEREST AREAS

As you determine the areas of interest you want to support with your giving, think about organizations that have affected you, where you volunteer and the issues you care about most.

This exercise gives you a chance to recognize what has meaning for you among the causes to which you can contribute. Put a check mark next to those that have the most meaning for you and then list your top three choices.

The following words and phrases describe areas of interest you may be passionate about.

- | | | |
|--|--|--|
| <input type="checkbox"/> Aging | <input type="checkbox"/> Food, agriculture and nutrition | <input type="checkbox"/> Parks and land preservation |
| <input type="checkbox"/> Arts and culture | <input type="checkbox"/> Gay, lesbian, bisexual and transgender rights | <input type="checkbox"/> Philanthropy and volunteerism |
| <input type="checkbox"/> Animals | <input type="checkbox"/> Girls' and women's issues | <input type="checkbox"/> Poverty reduction solutions |
| <input type="checkbox"/> Business development/
Entrepreneurship | <input type="checkbox"/> Global climate change | <input type="checkbox"/> Prison reform |
| <input type="checkbox"/> Children or child care | <input type="checkbox"/> Health/Mental health | <input type="checkbox"/> Recreation and sports |
| <input type="checkbox"/> Civil rights | <input type="checkbox"/> Housing and shelter | <input type="checkbox"/> Religion |
| <input type="checkbox"/> Civic rights and advocacy | <input type="checkbox"/> Human services | <input type="checkbox"/> Reproductive rights |
| <input type="checkbox"/> Community improvement | <input type="checkbox"/> Immigrant and refugee services | <input type="checkbox"/> Science and technology |
| <input type="checkbox"/> Cultural heritage | <input type="checkbox"/> International affairs and national security | <input type="checkbox"/> Social capital |
| <input type="checkbox"/> Crime and legal issues | <input type="checkbox"/> Literacy | <input type="checkbox"/> Sustainability |
| <input type="checkbox"/> Death and dying | <input type="checkbox"/> Medical research | <input type="checkbox"/> Youth development |
| <input type="checkbox"/> Disaster preparedness and relief | | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Diseases, disorders and medicine | | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Domestic violence | | |
| <input type="checkbox"/> Drug and alcohol abuse | | |
| <input type="checkbox"/> Economic justice | | |
| <input type="checkbox"/> Education | | |
| <input type="checkbox"/> Elder care/issues | | |
| <input type="checkbox"/> Employment/Workforce development | | |
| <input type="checkbox"/> Environment | | |

My/Our top three interest areas are:

Connecting **VALUES & INTERESTS**

Examine your top three values and interest areas. Do you see a relationship between them?

Example: If your top three values are community, justice and respect, and your top three interest areas are elder care, housing and poverty reduction solutions, the relationship could be that in order for everyone to live in a just community, all seniors must have enough financial support, including good housing, to lead their lives with respect.

The link between my/our values and interests is:



MISSION STATEMENT

- Values
- Interests
- Philanthropic goals
- Giving priorities



Developing Your **MISSION STATEMENT**

Your mission statement should be a clear expression of your philanthropic goals and giving priorities. When drafting your philanthropic mission statement, think about your values and interests, what can influence the issues you care about, your action steps that will support improvement and the time period in which your actions will occur.

Sample mission statements:

- » *Our family seeks to bring opportunity to the disadvantaged, strengthen the bond of families and improve the quality of people's lives.*
- » *Through my philanthropy, I will support strong institutions that contribute to the civic and cultural fabric of our community.*
- » *Our goal is to support and inspire creativity in the communities in which we live.*

Mission Statement:



SUPPORTING

Nonprofit Organizations

Before deciding to support an organization, be sure it will help you achieve your mission and charitable objectives by researching it. Consider touring the facility and speaking directly with the staff.



Signs of Organizational EFFECTIVENESS

Financial:

- » Annual audits are conducted and made available to you upon request.
Note: Some organization's assets are small enough that they are not legally required to perform an external audit. In this case, the organization should be able to provide you a copy of its IRS Form 990.
- » Financial statements are prepared quarterly, following a consistent format.
- » Solid fiscal management processes are in place.
- » The organization has a diverse range of supporters, such as individual donors at varying levels, foundations and government or other institutional contributors.

Governance:

- » Strong leadership runs the organization.
- » An active process for ensuring proper handling of governance issues exists.
- » A board nomination process and board term limits are in place.
- » Regular and on-going evaluation of programs and fundraising plans takes place.
- » The board of directors meets regularly.
- » The organization demonstrates flexibility to adjust to environmental shifts.



Organizational and Program Development:

- » A strategic plan is in place and guides the organization's work. It is reviewed annually and adjusted as necessary. Key staff refer to it when speaking with you.
- » Regular "client" input is welcomed and used for program improvement. The organization can demonstrate involvement of those they serve in planning and evaluation.
- » Other organizations doing similar work speak highly of the organization.
- » Staff can articulate key accomplishments, lessons learned and future direction.
- » The organization is recognized as an institution; is it not identified solely with one or two individuals.
- » The organization is able to demonstrate measurable outcomes.

Making A **DIFFERENCE**

By thoughtfully considering your values and interests and making the connection to your charitable dollars, you are poised to experience the joy of giving.

Ultimately, charitable giving is about improving quality of life. At the Community Foundation Tampa Bay we look forward to partnering with you and your family to achieve your charitable giving goals.

Contact us to:

- » Learn more about community needs and funding opportunities
- » Faciliate family discussions about charitable giving
- » Schedule site visits or opportunities to learn more about nonprofit organizations



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