

A decorative background consisting of a grid of 48 squares arranged in 8 rows and 6 columns. The colors of the squares vary by row: the first two rows are shades of blue, the next two are shades of purple, the next two are shades of orange, and the last two are shades of green. The text is centered in the middle of the grid.

# GROW THE WAY YOU GIVE

A Strategic Approach to Personal Philanthropy



COMMUNITY  
FOUNDATION  
OF GREATER  
GREENSBORO



## OUR MISSION

Let's create lasting impact in our community.

The Community Foundation of Greater Greensboro inspires giving, maximizes opportunities, and strengthens communities for present and future generations.

# 01

## **Start Your Journey**

Learn about the benefits of planned giving.

# 02

## **Identify Your Values**

Delve into the motivations behind your philanthropy.

# 03

## **Focus Your Giving**

Choose the causes that best fit your values.

# 04

## **Create Your Plan**

Plan your giving to create the legacy you want to leave.

# 05

## **Your Philanthropic Partners**

Learn the benefits of partnering with the Community Foundation of Greater Greensboro.



# 01 START YOUR JOURNEY

## Do you plan your philanthropy?

While most people take the time to plan their annual budgets and consider how their assets will be divided up at death, very few sit down to consider how they want to give money away, whether during life or after.

**We want to change that.** The Community Foundation of Greater Greensboro's mission is to inspire giving, maximize opportunities, and strengthen communities for present and future generations. We exist, literally, to work with donors from across this great city to make Greensboro an even better place.

We think everyone - regardless of income, regardless of net worth - should have a personal giving plan, and we have created this planner to help you start your own journey.

To get started, using the chart below, consider the organizations that received your top five largest cumulative gifts in the last year. You can include the total dollar amounts or just rank them from 1 to 5, largest to smallest. Next, check the boxes that correspond to the reasons why the donations were made. If there is more than one reason, check all that apply. If you volunteered your time, indicate that as well.

Was the gift . . .

**Friend Driven** - Donations made to an organization because a friend made a personal request, such as asking you to an event or fundraiser

**Impulse Driven** - Unplanned donations to address immediate needs such as natural disasters or something you saw on the news

**Life Driven** - Donations made to organizations that are part of your daily life - place of worship, your alma mater, your child's school

**Mission Driven** - Donations to organizations that align with your personal values and interests

Total \$ or Rank		Organization	Friend Driven	Impulse Driven	Life Driven	Mission Driven	Volunteer Hours
1							
2							
3							
4							
5							

# 02 IDENTIFY YOUR VALUES

**Our lives and experiences shape our personal values, revealing what is most important to us.**

Values can be rooted in faith, tradition, career, or personal interests. This exercise will help you identify the most important values to consider as you give. We've listed a few to get you started. Feel free to add any not listed here. Choose your top 10, then narrow your list to five, and finally select your top three.

Adventure	Forgiveness	Prosperity
Balance	Freedom	Resilience
Challenge	Friends	Respect
Collaboration	Happiness	Responsibility
Community	Harmony	Risk-taking
Compassion	Honesty	Security
Competence	Humility	Self-reliance
Courage	Impact	Self-respect
Creativity	Inclusion	Service
Curiosity	Independence	Simplicity
Dignity	Innovation	Social Justice
Diversity	Integrity	Social Responsibility
Education	Kindness	Success
Empowerment	Knowledge	Sustainability
Entrepreneurship	Leadership	Tolerance
Equity	Legacy	Transparency
Excellence	Openness	Trust
Fairness	Opportunity	Wealth
Faith	Personal Experience	
Family	Power	

## TOP 10

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## TOP 5

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## TOP 3

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Was it difficult to narrow down your choices? If so, why? \_\_\_\_\_

---

---

---

---

Why are you motivated by these three values? \_\_\_\_\_

---

# 03 FOCUS YOUR GIVING

Given so many issues and needs, it can be challenging to identify a focus for your philanthropy.

A community's health can generally be tied to how well it addresses issues in the eight categories we've listed below. These categories provide a framework for your overall giving strategy, whether you give locally, nationally, or internationally. Feel free to add your own. Choose your top five, then narrow your list to three.

## Basic Needs

- Affordable Housing
- Food Insecurity
- Homelessness
- Poverty Alleviation
- Social Justice/Civil Rights

## Health and Wellness

- Access to Affordable Health Care
- Adoption/Foster Care Services
- Animal Welfare/Companionship
- Disabilities
- Domestic Support Services
- Domestic Violence/ Sexual Assault
- Medical Research
- Mental Health
- Preventative Care/Wellness
- Seniors/Long-term Care
- Substance Abuse
- Veteran Issues

## Arts and Culture

- Access & Participation
- Arts & Music Education
- Helping the Arts Flourish
- Historic Preservation
- Performing Arts
- Public Media, Radio/Television
- Visual Arts

## Thriving Economies

- Economic Development
- Economic Resilience
- Gender Wage Gap
- Small Business/Entrepreneurship
- Workforce Development

## Education

- Adult Basic Education
- Continuing Education
- Early Learning
- English Language Learners
- Higher Education
- Libraries
- Literacy
- Youth programs

## Vibrant Communities

- Civic Education/Engagement
- Community Building
- Community Revitalization
- Equity
- Faith Communities/ Interfaith Collaboration
- Immigrants & Refugees
- Parks & Open Spaces
- Policy & System Change
- Public Safety
- Social Support

## Global Issues

- Clean Water/Sanitation
- Disaster Relief/Recovery
- Disease Eradication/Vaccines
- Economic Opportunity
- Education
- Empowering Women/Girls
- Food Insecurity
- Gender-based Violence
- Health
- Infant Mortality
- Land Rights
- Leadership/Advocacy/Social Change
- Pollution
- Poverty Alleviation

## The Environment

- Climate Justice
- Endangered/Threatened Species
- Environmental Education/Advocacy
- Environmental Protection
- Sustainable Agriculture/ Development/Transportation
- Wildlife Conservation/ Protection

TOP 5

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

TOP 3

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# 04 CREATE YOUR PLAN

What impact do you want to have on the issues you are most passionate about? Consider these three primary strategies for creating change.



## RELIEF

Provides direct services to those requiring immediate help.



## PREVENTION

Identifies causes and proactively offers services and support to avoid the need for services in the future.



## REFORM

Efforts to advocate for improvements in current systems, laws, and policies.

## RESULTS

Once you understand what drives your philanthropy, the next step is developing a plan that ensures your charitable giving is in line with your values, interests, and desire for impact. After completing this exercise, many people find they haven't been as focused as they would like - targeting their giving to the things they care about the most.

Which strategy resonates with you? Which strategy has been the focus of your past philanthropy? Does this exercise make you consider altering your future giving?

---

---

---

---

---

---

---

---

---

---

---

---

# 05

# YOUR PHILANTHROPIC PARTNERS

**Learn more about the issues and needs in our community**

- Explore our partnerships with the Guilford Nonprofit Consortium and other nonprofits to learn more about the over 700 nonprofits already at work.
- Schedule a one-on-one conversation with one of us to discover opportunities to match the issues and needs that are important to you with nonprofits and other philanthropists in our community.

## Use tax-efficient giving techniques

- Receive the latest information regarding donor advised funds to maximize the tax benefits of your charitable gifts.
- Easily and efficiently donate appreciated assets to the nonprofits that you want to support.
- Consider using IRA Required Minimum Distributions as Qualified Charitable Distributions.

## Create your own legacy plan

- Design a plan for your philanthropy that will continue in perpetuity, giving the Community Foundation instructions on how to support your favorite causes or even wherever the needs are the greatest year-to-year.
- Go deeper into learning more about initiatives that address strategic areas of interest, including housing, equity, women's issues, education, and more.
- Endo your annual giving to specific programs or charities.

**NOTES:** \_\_\_\_\_

[illegible]





[cfgg.org](http://cfgg.org)

