



A Strategic Approach to Personal Philanthropy



**COMMUNITY  
FOUNDATION**  
OF GREATER  
GREENSBORO



**OUR MISSION**

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

# START YOUR JOURNEY



**Do you plan your philanthropy? If your answer is “no,” you are not alone. Most people don’t.**

While we take the time to plan our annual budgets and consider how our assets will be divided up at our death, very few of us sit down to consider how we want to give money away, whether during our life or after. We want to change that. The Community Foundation of Greater Greensboro’s mission is to inspire giving 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 you started, within 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 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	Life Driven	Impulse Driven	Mission Driven	Time Contributed
1							
2							
3							
4							
5							

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

**Why are you motivated by these three values?**

**Was it difficult to narrow down your choices?**

**TOP 10**

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

**TOP 5**

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

**TOP 3**

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

# 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. Select and rank the top five issues that are most important to you, then eliminate two.

## Basic Needs

- Access to Nutritious Food
- Affordable Housing
- Homelessness
- Poverty Alleviation (domestic)
- Social Justice/Civil Rights

## Health and Wellness

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

## Arts and Culture

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

## Education

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

## Vibrant Communities

- Civic Education/Engagement/Participation
- Community Building
- Community Revitalization
- Faith Communities/Religious Organizations
- Immigrants & Refugees
- Parks & Open Spaces
- Policy & System Change
- Public Safety
- Social Support

## Thriving Economies

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

## The Environment

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

## Global Issues

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

## MY TOP 5 ISSUES

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

## MY TOP 3 ISSUES

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

# CREATE YOUR PLAN



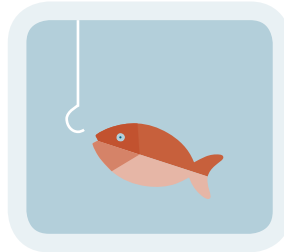
What impact do you want to have on the issues you are most passionate about?  
Consider these three primary strategies for creating change.



## Relief

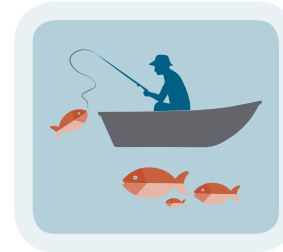
Provides direct service to those requiring immediate help.

*Give someone who is hungry a fish.*



## Prevention

Identifies causes and proactively offers services and support to avoid the need for services in the future. *Teaches someone who is hungry how to fish.*



## Reform

Efforts to advocate for improvements in current systems, laws and policies. *Ensures that all people have access to bait, tackle and an unpolluted lake so they can fish.*

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.

The professionals at the **Community Foundation of Greater Greensboro** (cfgg.org) can help you plan and find the best fit for your philanthropy. A trusted philanthropic advisor to over 700 fundholders in the Greater Greensboro region, we work hand-in-hand with donors, and their financial advisors. Because we have been serving the community for over 35 years, we have a deep understanding of community needs and the nonprofits that strive to meet them. We hope you will reach out to learn more about how we can help you with your philanthropic goals.



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