



Excellence in Giving Services

DISCOVER

Discovery Process \$6,000-8,000

A comprehensive assessment of your personal giving priorities and philanthropic mission using our *Philanthropic Discovery Questionnaire*. The results enable you to strategically concentrate your giving plan and legacy, including: *Joy-Filled Giving Profile*, a philanthropic mission statement with giving priorities and values, and *Giving Game Plan*, a detailed look at your 5-year giving history and trends.

EVALUATE

Level 1-5 Organizational Evaluations \$2,500-30,000

Evaluate organizations before you give. We perform 5 levels of organizational evaluations ranging from an overview (Level 1 = \$2,000) to a comprehensive evaluation on-site with an industry analysis (Level 5 = \$25,000).

Community Solutions Assessment \$65,000-95,000

Research community trends and nonprofit solutions to give strategically in a local community. The final user-friendly report produces concise conclusions about what is getting better or worse and why, and offers: (1) root causes of community problems, (2) success stories of improvement, and (3) recommended grant ideas.

Outcomes Measurement Project \$75,000-125,000

To help clients support high-impact organizations, we build processes to measure the lasting transformation linked to nonprofit programs. Nonprofits receive the benefit of an ongoing outcomes measurement process while donors get concrete impact data to make smart giving decisions.

PARTICIPATE & CELEBRATE

Giving Advisor \$25,000-50,000 per year

- GIVING MEETINGS:** Excellence in Giving will organize and prepare information to conduct productive meetings, including sourcing giving opportunities, managing requests with appropriate diligence, reviewing grant history, and providing a forecast of future plans.
- GRANTEE EVALUATION:** Ongoing research and analysis of your favorite nonprofits to determine the best ways to help them fulfill their mission. Excellence in Giving will annually gather *Analytical Overviews* with up-to-date operational and impact data and collect *Grant Impact Reports* following gifts at appropriate timing to ensure the outcomes met the initial goals.
- EXPERIENCE YOUR IMPACT:** Celebrate and personally experience the results of your philanthropic investments. Organize site visits, conference calls with nonprofit leaders, and connections to grantee accomplishments.
- GRANT ADMINISTRATION:** Regular tracking and reporting through *Giving Dashboard* and *Giving Forecast* reports, so it's clear you're accomplishing everything you set out to do.

Full-Service Philanthropy Advisor \$50,000-90,000 per year

ALL GIVING ADVISOR SERVICES WITH EXPANDED TIME AND VALUE PLUS:

- FAMILY MEETINGS:** Share family history and values, discuss how wealth will transfer and establish legacy you desire.
- NEXT GEN PHILANTHROPY TRAINING:** Train the second and third generations in effective philanthropy and enjoy giving as a family through a regular, organized process.
- GIFT OPTIMIZATION:** Utilize Excellence in Giving's national and international network and experience to structure grants, connect with partners, support your favorite nonprofits with the best practices, and leverage your gift.
- SPECIAL PROJECTS:** Options for add-on projects include:
 - (1) Corporate Generosity, (2) Community Meetings, (3) Service Trips/Family Trips, (4) Special Event Planning



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