



2021 | EXCELLENCE IN GIVING
PROSPECTUS



Excellence in Giving
the joy of generosity

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**CLIENT
QUOTES**
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"Al Mueller's personal advice, involvement, and partnering with my family is invaluable and greatly responsible for any accomplishment we enjoy with the Fort Worth/Empart partnership. God certainly has His hand on you and what you bring to His Great Commission."

-Tom C., Fort Worth, TX

"We would not have reached the charities we are now supporting without [their] experience. [Excellence in Giving] is helping us make sure the money is being used in the ways we intended."

-Paul K., Stamford, CT

"We even feel better about what we are doing, and how we are doing it. Thanks to you and EIG, I really can say that our impact and joy have increased!"

-Tom L., Scottsdale, AZ

"We are grateful for your experience and wisdom in guiding us to this point in our family foundation work and the relationships which are a part of working together. We all trust you to help us help others."

-Molly A., San Antonio, TX

"When we started looking at LeaderSource you looked at it and encouraged us to get involved. You were able to recognize a good thing when you saw it. This is just one instance where you have served us well. Thanks for your partnership and friendship along our journey."

-Dale B., Midland, TX

"We know, love, and highly recommend Al and his team. Character and competence characterize his life and organization."

-Will L., Midland, TX

"Thanks for all of the help from your team. You guys make our giving easy and well-informed."

-Brent J., Tyler TX

Excellence in Giving
has made our giving
low maintenance
and **high impact!**

-Pete C., Fort Worth, TX

BEFORE & AFTER



We **transform** your charitable giving experience.

Excellence in Giving Process

Excellence in Giving’s advisory role begins by identifying our clients’ passions, values, and focus for philanthropy. We manage the giving portfolio by reviewing grant requests, performing appropriate levels of due diligence, conducting family meetings, establishing benchmarks for each gift, and gathering measurable post-grant data to celebrate the impact of philanthropic investments.



Client Profile

Our services are targeted to families and individuals who fit the following criteria:

1. Business owners or executives with significant demands on time.
2. Widows, widowers, and heirs; particularly those whose spouse or parent made most financial decisions.
3. Frustration responding to incoming requests for charitable gifts.
4. Desire and capacity to give \$500,000+ annually from current income and assets.
5. Actively deciding how to raise their standard of giving rather than their standard of living.
6. Families who desire to train the next generation and increase family communication about giving.
7. Values information from nonprofits about the specific, measurable outcomes from gifts.



Client Service Options

SERVICE	PROCESSES	VALUE	PRICE
Giving Meeting, Next Gen Family Giving, Family Meeting	Source opportunities Manage requests Forecast giving plans Next gen training Family history/values	Clear Strategy New Ideas Family Unity	\$5,000-10,000 Per meeting
Grantee Evaluation	Nonprofit Analytics Bullet-Point Evaluations Due diligence calls w/leaders	Confidence	\$10,000-30,000 annually
Gift Optimization	Creative grant structure Partnerships Leverage network Make nonprofits better	Greater Impact	\$5,000-20,000 annually
Celebrate Your Impact	Impact Reports Site visits/calls/videos Unique experiences Philanthropy Trips	Joy	\$5,000-\$15,000 annually
Grant Administration	Grant Tracking Schedule commitments Grant processing Giving Dashboard reports Giving Forecast reports	Low Maintenance	\$5,000 annually
Special Projects	Custom		TBD

DISCOVERY

Explore issues you care about, the values you want to pass on, and the legacy for which you'll be remembered.

"I am impressed with the thoroughness of your work and the insightful observations presented in a sensitive way."

Dale B. - TX Client

SAMPLE DELIVERABLES



Joy-Filled Giving Profile

Prepared for **Smith Family** by **Excellence in Giving**

The Purpose of Our Giving

We both affirm that the purpose of the wealth entrusted to us is to serve (1) strategic international and regional organizations committed to caring for and educating orphans, and meeting the needs of the poor and widows, and (2) select local organizations that foster the welfare of the community. We will serve by providing financial resources and investing personal time.

Our Giving Priorities

We have learned that wise stewardship involves not only funding effective organizations but also following the passions and interests we have gained through our life experiences. The following "giving priorities" will guide the use of our time, talent, and treasure.

- 1 CREATE A "LEGACY OF GENEROSITY" FOR OUR CHILDREN**
Our children are our most important asset and most critical investment. We want to serve as models of generosity for them and involve them actively in our giving decisions.
- 2 ASSIST THE DISENFRANCHISED**
We believe firmly in our responsibility to care for the poor and widows. We want to assist disenfranchised people by helping them discover a purpose for their lives and by encouraging them to follow sound principles.
- 3 CONTINUE TO DEVELOP A GLOBAL FOCUS**
Through our travels, we have widened our perspective of the needs around the world. We will not only be involved in our community, but also focus globally to help social agencies changing lives in the international contexts we feel called to support.
- 4 RESCUE AND REHABILITATE ORPHANS**
Our family experiences of dealing with the pain of childhood loneliness helps us appreciate the need for sustained physical, social and emotional care. Our giving will focus on meeting the needs of orphans around the world to foster self-sufficiency.
- 5 BECOME WISE GIVERS**
We want to be responsible as wise stewards of our giving. Our giving will focus on organizations that demonstrate high integrity. We will give preference to projects that are innovative and have a high probability of success.
- 6 PROVIDE ENCOURAGEMENT**
Both of us are energized by encouraging others. We will seek out specific opportunities in our giving to be an encouragement to those we give to. We want them to realize the source of our love and our generosity.

What Brings Us Joy in Giving

We realize that we have unique sensitivities to experiencing joy that have been shaped through specific life circumstances. We desire to experience increased joy by:

- 1. Regular giving:** We will make a portion of our giving regular and systematic. We also want to respond to organizations that present requests for spontaneous gifts.
- 2. Active involvement:** We prefer to be actively involved in organizations we provide with significant support, giving not only our financial resources but also our time.
- 3. Witnessing results first-hand:** We enjoy seeing the organizations we support in action and hearing stories of lives that were changed. We want to visit sites and read regular reports.
- 4. Increasing in wisdom:** We want to continue to discover and understand the purpose for our resources. We want to model wise philanthropy for our children.

What Keeps Us From Joy in Giving

We have taken on the responsibility to support social agencies that reach out to orphans, the poor, and to widows. In allocating philanthropic resources, however, we want to avoid:

- 1. Ineffectiveness:** We want our giving to fund innovative projects. We desire high-impact opportunities with measurable outcomes. We have been entrusted with wealth, and we take seriously our responsibility to give it away wisely.
- 2. Family wealth:** We recognize that our wealth should serve a purpose. Our children should be trained appropriately, but the responsibility to give it away lies with us.
- 3. Disorganized giving:** We desire to have a well-reasoned plan for our giving. We want to carefully examine how we give, where we give, and why we give.
- 4. Over-commitment:** We realize there are unlimited requests for our time and resources. We need to maintain a healthy balance in our lives and avoid saying "yes" to every request to serve and/or give.

Giving Game Plan



Prepared for **Smith Family** by **Excellence in Giving**

John and Mary Smith: Smith Family Foundation

Purpose Statement:

The foundation exists to provide resources to meet the physical and emotional needs of disadvantaged people in Texas and worldwide.

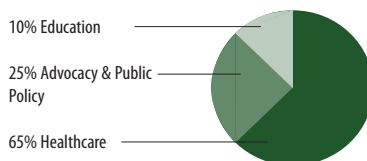
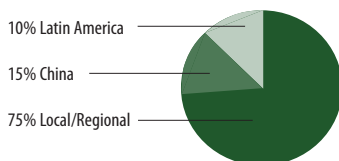
Desired Legacy:

John and Mary Smith will be remembered as wise stewards of their resources. They maximized the impact of their generosity by carefully selecting effective organizations and by transferring their values to their children and grandchildren.

Giving Goals and Targets:

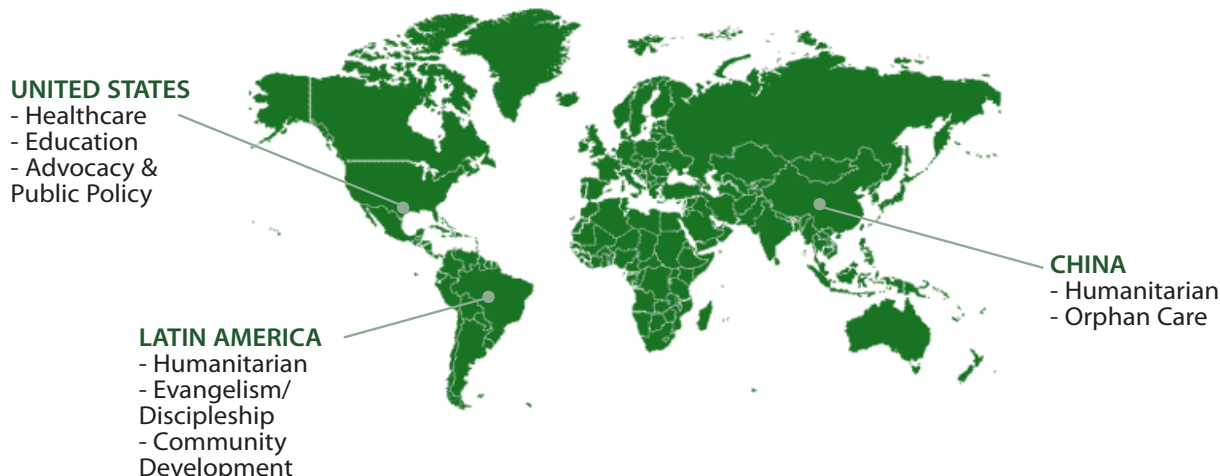
2021 Target	\$ 1,500,000
10-Year Goal	\$ 20,000,000
Legacy Goal	\$ 35,000,000

Target Category Allocations:



Target Geographic Allocations:

The Smith Family Foundation actively supports local charities in Texas that provide guidance and aid to the sick. In both the United States and worldwide, education is an important theme in their generosity. In addition, the foundation provides ongoing funding for organizations in China and Latin America, providing for their physical and emotional needs in a nurturing environment.



CAPSULE DATA

Smith Family Foundation

14319 Highview Ln.
Dallas, TX 75225

ph 555.441.1123

fax 555.334.5512

www.smithfamilyfdn.org

Contact: Mary Smith

Year Founded: 2002

Geographic Focus:

- Local/Regional (75%)

- China (15%)

- Latin America (10%)

Meeting Frequency: Quarterly

Annual Board Meeting: August

Disbursements: Semi-Annual

Gift Size (max): \$1,500,000

Gift Size (min): \$2,000

FY20 Assets: \$7,360,000

FY20 Total Giving: \$1,509,850

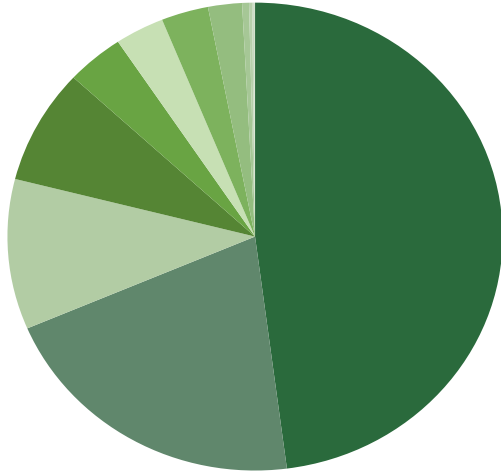
FY20 Expenses: \$77,520

Total Orgs Supported 2020: 53

EIN: 351-87-2803

Prepared for **Smith Family** by **Excellence in Giving**

Total Giving by Program Area: A review of your total giving by program area, 2015 - 2020



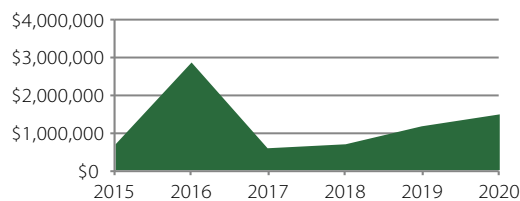
Area	Allotment	# of Orgs	Total Giving
Healthcare	48%	3	3,641,994
Advocacy/Public Policy	21%	6	1,567,775
Education	10%	8	788,481
Humanitarian/Mercy Ministry	8%	10	602,965
Environment/Animals	4%	3	285,750
Personal/Social Development	3%	10	244,200
Adoption/Foster/Orphan Care	2%	5	233,650
Evangelism/Discipleship	0%	4	168,066
Community Development	0%	2	34,000
Arts/Media	0%	3	15,100
Social Justice	0%	3	8,400
Support Services	0%	3	6,050
Total		60	\$7,596,431

Top Gift Recipients: Organizations that received the highest proportion of your total giving, 2015 - 2020

	Total Gifts	Impact	Satisfaction
MD Anderson Cancer Center	\$2,432,734		H M L
Cook Children's Medical Center	\$1,000,000		H M L
Texas Christian University	\$ 731,111		H M L
International Justice Mission	\$ 579,000		H M L
Texas Public Policy Foundation	\$ 564,273		H M L
Liberty Institute	\$ 286,000		H M L
Samaritan's Purse	\$ 275,000		H M L
Alzheimer's Association	\$ 209,260		H M L
Show Hope	\$ 173,200		H M L
Fort Worth Zoo	\$ 150,000		H M L
Dallas Arboretum	\$ 130,000		H M L
Good News Jail & Prison Ministries	\$ 126,500		H M L

Overall Giving Trends: Overview of how your giving has changed, 2015 - 2020

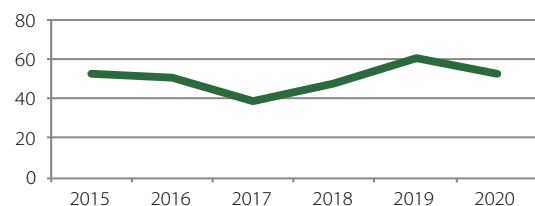
Total Gifts, 2015-2020



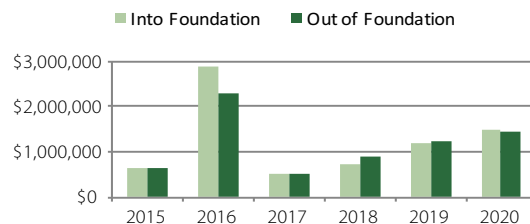
Year Total Gifts Orgs Supported

Year	Total Gifts	Orgs Supported
2015	\$ 692,750	53
2016	\$ 2,895,253	51
2017	\$ 577,615	39
2018	\$ 715,537	48
2019	\$ 1,205,426	60
2020	\$ 1,509,850	53

Number of Organizations Supported Annually



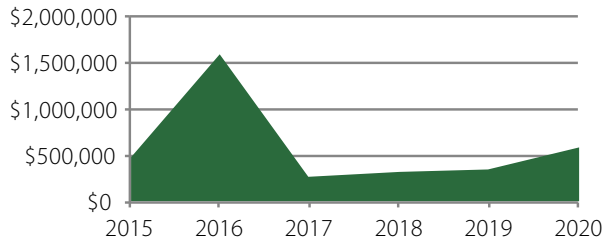
Foundation Activity



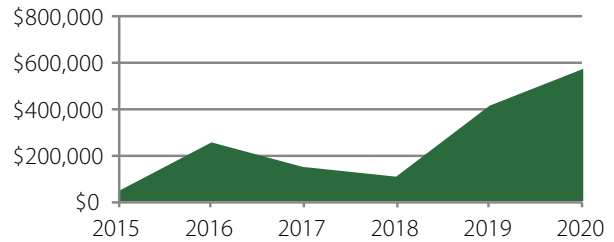
Prepared for **Smith Family** by **Excellence in Giving**

Category Trends: Overview of how your giving has changed in each category, 2015-2020

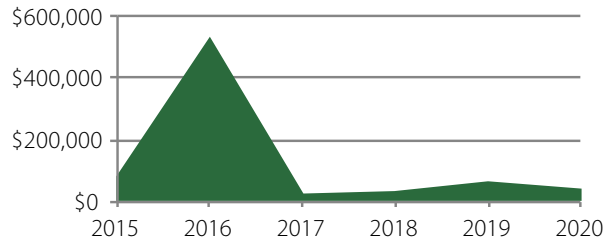
Healthcare: \$3,641,994



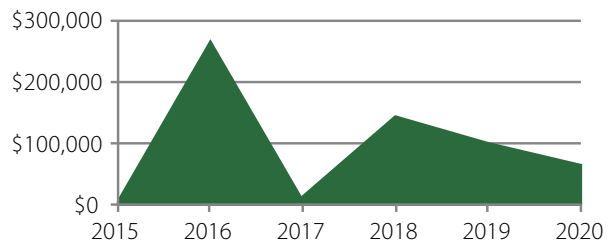
Advocacy & Public Policy: \$1,567,775



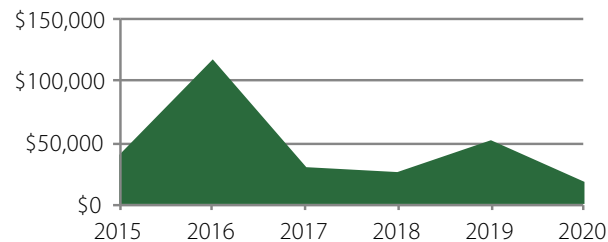
Education: \$788,481



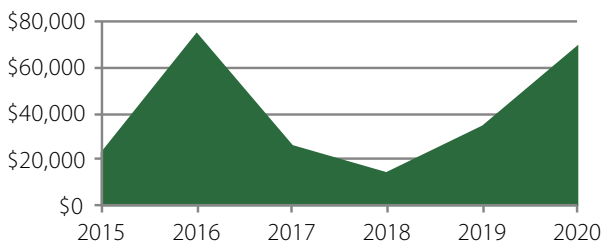
Humanitarian/Mercy Ministry: \$602,965



Environment/Animals: \$285,750



Personal/Social Development: \$244,200



Overall Giving Trends: Overview of giving by program area, 2015 - 2020

	2015	2016	2017	2018	2019	2020	Total
Healthcare	473,950	1,606,075	269,800	333,750	359,000	599,419	3,641,994
Advocacy & Public Policy	50,400	260,205	154,990	106,925	417,732	577,523	1,567,775
Education	85,000	534,898	28,250	35,142	65,578	39,613	788,481
Humanitarian/Mercy Ministry	7,050	267,200	13,750	145,170	102,800	66,995	602,965
Environment/Animals	39,500	117,750	30,100	27,150	51,750	19,500	285,750
Personal/Social Development	23,400	75,400	26,000	15,150	34,750	69,500	244,200
Adoption/Foster/Orphan Care	2,700	3,000	27,700	25,250	100,000	75,000	233,650
Evangelism/Discipleship	0	30,250	25,000	25,000	36,816	51,000	168,066
Community Development	0	0	0	500	23,500	10,000	34,000
Arts/Media	3,000	100	2,000	1,000	8,000	1,000	15,100
Social Justice	7,750	125	25	500	0	0	8,400
Support Services	0	250	0	0	5,500	300	6,050
Total	\$ 692,750	\$ 2,895,253	\$ 577,615	\$ 715,537	\$ 1,205,426	\$ 1,509,850	\$ 7,596,431

EVALUATION

Review giving history and take a closer look at nonprofits you want to support. Define the focus, scope, and priorities of future giving.

“I love the color-coded report! As a donor, I’ve never been given so much insight before making a giving decision.”

Laurie L. - TX Client

SAMPLE DELIVERABLES

Plant with Purpose (PWP) Evaluation



strength






caution





weakness



STRATEGY

-  **Theology of Work.** PWP teaches theology, not just farming techniques, via 683 local church partners in 8 countries. PWP trains local churches in the *Theology of Work* to encourage clients to fulfill their God-given purpose.
-  **Clear Goals.** PWP's strategic plan lays out 75 specific planned objectives over 5 years. The plan includes income and expense projections through FY2025 with growing cash reserve targets as PWP commits to more work around the world. Other annual goals include church partnerships, families and people served, and number of donors.
-  **Geographic Focus.** PWP serves clients through partnerships in Mexico, Haiti, DR, Thailand, Burundi, DRC, Tanzania, and Ethiopia. PWP leadership must either spend extensive time and money to provide effective oversight across 3 continents in countries with vastly different cultures and languages or risk limited program implementation knowledge. PWP plans to add 2 new countries by FY2025.




LEADERSHIP

-  **Active and Supportive Board.** PWP's gender-diverse Board meets quarterly, works in 4 committees, and evaluates the CEO annually. The Board has approved an up-to-date strategic plan and contributed 12% in gift income in FY2020.
-  **National Leadership.** PWP's 250 field staff are nationals located in Latin America, Africa, and Asia. Indigenous PWP leaders can build trust, avoid miscommunication with stakeholders, and navigate the unique logistical, religious, and cultural challenges.

IMPACT

-  **Impact Evaluation.** In FY2019, PWP clients "experienced a 63% reduction in poverty, improving their quality of life by nearly 2/3." PWP assesses impact with a rigorous sampling method known as Difference in Differences. PWP collects data before and after the program from a treatment group and a comparison group so it knows if the PWP program was the reason for making progress out of poverty across various indicators.
-  **Spiritual Impact.** PWP teaches participants to trust in God and care for others. Pilot program watershed residents reported that they helped their neighbors twice as often as the comparison group, and they were twice as likely to believe their faith sustains them in challenging circumstances.

FINANCES

-  **Financial Policies and Procedures.** PWP has distributed a detailed, recently updated, 30-page Internal Controls and Processes Memorandum to its staff. The document outlines a clear separation of financial duties and provides detailed instructions so each person knows their role.
-  **Financial Position & Management.** PWP has a healthy 3-6 months of cash on hand and was able to manage fluctuations in income related to COVID-19. Net assets of \$4.6M at the end of December 2020 are exaggerated by a \$3.2M gift recorded in FY2018 that will be spent over 7 years.
-  **Constituency Education.** PWP allocated 81% of its expenses to programs in FY2019 and only 12% to fundraising. But PWP allocates a sizeable amount of program funding to its US-based Constituency Education program. In FY2019, 16% of PWP's total expenses were dedicated to Constituency Education, which left only 65% of funding for international programs.



Nonprofit Analytics

GENERAL

Organization Name	Floresta USA, Inc. - dba Plant With Purpose		U.S. Tax ID#	33-0052976	Year Founded	1984
HQ Street Address	4747 Morena Blvd., Ste 100		City & State	San Diego CA	Zip	92117
Phone	858.274.3178	HQ Nation	United States		Website(s)	www.plantwithpurpose.org
Primary Contact & Title	Corbyn Small - Regional Representative, Denver		Contact Email	corbyn@plantwithpurpose.org		
Organization Type	Independent Public Charity		Annual Report Link	https://bit.ly/3ec0ZpE		
Nonprofit Accountability Listings	<input type="checkbox"/> BBB (give.org) <input type="checkbox"/> Guidestar <input type="checkbox"/> ECFA	<input type="checkbox"/> Charity Navigator <input type="checkbox"/> Charity Watch <input type="checkbox"/> Ministry Watch	Strategic Partners	Global EverGreening Alliance, local universities and schools, 745 church partners across the US and our partner countries, and HOPE International		
Primary Program Area	Poverty Alleviation		Peer Group	Tear Fund, Nuru International, HOPE International, World Vision		
Other Program Area(s)	Agricultural Development		Clients Served	Rural Poor		

GROWTH TRENDS

	FY 2017	FY 2018	FY 2019	FY 2020	% Change	Explanation
Paid Staff (FTE)	18.0	18.0	18.0	21.0	17 %	US & Canada only (~250 FT nat'l staff in 8 countries N/I)
Clients Served	193,776	189,382	200,185	221,937	15 %	Individuals (~5 ppl/fam.) 37,203 have graduated entirely.
Annual Income	\$3,822,598	\$8,213,827	\$5,567,740	\$4,855,759	27 %	\$3.2MM pledge was issued in FY18 to be paid over 7 years
Donors	1,246	1,403	1,441	1,511	21 %	Campaign infrastructure investments bearing fruit
Key Activity	4,159,944	4,593,337	4,996,013	4,724,570	14 %	Trees planted. Help soil, diversify incomes, build resilience

FUNDRAISING

Donor Retention Rate	62 %	Gov't Funding %	0 %	Cost to Raise \$1 (NOT "GIK")	\$ 0.13	Self-sustainability %	0 %
Largest Gift for FY2020	\$350,000	Reliance on Largest Gift	7 %	Last Capital Campaign	2015 - 2018	Endowment Fund	\$66,358
Donors Listed by Gift Size for FY2020	Gift Size:	< \$1,000	\$1K - 4,999	\$5K - 24,999	\$25K - 49,999	\$50K - 99,999	\$100,000 +
	# of Donors:	1,075	280	111	24	15	6
	Total Amount:	\$ 243,757	\$ 547,643	\$ 1,074,578	\$ 773,499	\$ 896,708	\$ 1,296,382

FINANCIAL MANAGEMENT

Cash & Equivalents on Hand	3-6 Months	Near-term Expendable Net Assets	\$4,594,984	Total Current Debt	\$31,000
Written Financial Controls	<input checked="" type="radio"/> Yes <input type="radio"/> No	Independent Financial Audits	<input checked="" type="radio"/> Yes <input type="radio"/> No	Reserve Coverage %	86 %
Earned Revenue Sources	Investment Income		Primary Types of GIK	N/A	

FISCAL YEAR		FY 2017		FY 2018		FY 2019		FY 2020		2021	2017-2020	
07/01 TO 06/30										<input checked="" type="radio"/> BUDGET <input type="radio"/> ACTUALS	FY TRENDS	
INCOME	Earned Revenue	\$8,405	\$6,226	\$20,854	\$23,192	\$20,000	176 %					
	Gifts in Kind	\$0	\$0	\$0	\$0	\$0	%					
	Cash Donations	\$3,814,193	\$8,207,601	\$5,546,886	\$4,832,567	\$7,090,000	27 %					
	<i>Total Income</i>	\$3,822,598	\$8,213,827	\$5,567,740	\$4,855,759	\$7,110,000	27 %					
EXPENSES	Program Services	\$3,574,003	82 %	\$3,490,659	81 %	\$3,825,944	81 %	\$4,218,460	79 %	\$5,668,660	82 %	18 %
	Administrative	\$331,950	8 %	\$350,816	8 %	\$331,933	7 %	\$467,013	9 %	\$553,040	8 %	41 %
	Fundraising	\$477,056	11 %	\$461,888	11 %	\$551,162	12 %	\$645,162	12 %	\$691,300	10 %	35 %
	<i>Total Expenses</i>	\$4,383,009		\$4,303,363		\$4,709,039		\$5,330,635		\$6,913,000		22 %
SURPLUS/DEFICIT		\$560,411		\$3,910,464		\$858,701		\$474,876		\$197,000		

LEADERSHIP						*Total Volunteers reflective of US only	
CEO Name & Tenure	Scott Sabin		25 yrs	CEO Age	50-59 yrs	Total CEO Compensation	\$ 147,735
CEO Annual Evaluation	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO has Board Vote	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO Successor Identified	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Total Paid Staff by Type	FT: 19	PT: 3	Staff Turnover Rate	5%	Total Volunteers*	51	
Yearly Staff Evaluations	<input checked="" type="radio"/> Yes <input type="radio"/> No	CEO Direct Reports	2 staff		Annual Board Meetings	4	
Board Chair & Tenure	John Steel		7 yrs	Board Size	11	Board Gender Diversity	Men:7 Women:4
Donation % from Board	12%	Board Committees	4	Term Length	3 yrs	Consecutive Term Limits	2 terms
Additional Advisory or Development Board		<input checked="" type="radio"/> Yes <input type="radio"/> No		Number of Board Members Related to the CEO		0	
STRATEGY							
MISSION	Plant With Purpose, a Christian nonprofit organization, reverses poverty and deforestation around the world by transforming the lives of the rural poor.						
CLIENTS SERVED	We serve marginalized farming families who depend on the land for a living but cannot produce what they need due to the impact of environmental degradation.				LENGTH of Primary Client Relationships	8 Year(s)	
The PROBLEM	84% of the economically poorest people in the world are rural and depend on land that is increasingly under strain (MPI poor). Disempowerment and a lack of access to financial tools exacerbate environmental degradation and poverty, leaving families without choices and in a downward cycle.						
Your SOLUTION	We empower families to be the change their community needs. We restore hope through discipleship, reverse the cycle of environmental degradation with sustainable agriculture land management techniques, and equip families to grow out of poverty through savings groups (VSLA) and business development.						
1-3 year PLAN	1.) Our 2015-20 strategic plan focused on strengthening impact and efficiency. Our model of environmental restoration, economic development, & spiritual renewal is ready to take to scale, and we are beginning rapid growth. 2.) In FY21, we will add 572 new groups representing 14,500 families, bringing our program to a total of 53,900 families. 3.) By 2023, we plan to grow from 41,000 to 68,000 families and increase our income from \$5.7MM to \$8 million.						
Up-to-date Board-approved STRATEGIC PLAN		<input checked="" type="radio"/> Yes <input type="radio"/> No		CUT (or Modified) PROGRAM in last 3 years for bad results		<input checked="" type="radio"/> Yes <input type="radio"/> No	
IMPACT							
Long-term VISION	Eradicate rural poverty by addressing rural poverty's root cause: environmental degradation. Restore the environment to foster healthy farms and families, inspire hope rooted in faith and knowledge of Jesus Christ, and equip families with financial tools like savings and credit.						
RESULTS Report outcomes not activities	(i.) Families in savings groups have saved 2.1 months of expenses, which is \$137 per family, or \$5.1MM in total equity in FY19. (ii.) When measured against a control group in FY19, Plant With Purpose families: 1.) Were 64% more likely to say that they have the power to improve their lives than the control group. 2.) Experienced a 63% reduction in poverty, improving their quality of life by nearly 2/3. Also, nonparticipants living in project watersheds showed a 44% reduction in poverty rates, which was directly attributed to our program model. 3.) Planted 5.7X more trees. 4.) Lived out their faith by serving their neighbors 20% more frequently. (iii.) 268 graduated groups continue growing and serving.						
Measure outcomes against benchmarks	<input checked="" type="radio"/> Yes <input type="radio"/> No	Track Key Performance Indicators	<input checked="" type="radio"/> Yes <input type="radio"/> No	Completed independent impact evaluation	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Completed program logic model(s)	<input checked="" type="radio"/> Yes <input type="radio"/> No	Survey program beneficiaries	<input checked="" type="radio"/> Yes <input type="radio"/> No	Conducted randomized controlled trial (RCT)	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Impact STORY	Anastazie, a mother of six in eastern DRC, joined her local Plant With Purpose-trained VSLA. In addition to learning money management skills, she received training in sustainable agriculture. She stated, "Before receiving training, yields were low, bringing little income, but now we are beginning to see good results. My children used to eat once a day, but now my house eats 2 meals a day. I am happy to have Plant With Purpose in our watershed."						
Recent Program IMPROVEMENT	Our watershed methodology has enabled us to extend our impact beyond direct participants to entire communities. We tested this methodology in a DRC pilot project and saw substantial impact results, then replicated it to a second watershed location. We are currently taking it to scale in the DRC.						
GEOGRAPHY							
Where do your programs operate?	<input type="radio"/> Local <input type="radio"/> Regional <input type="radio"/> National (USA) <input checked="" type="radio"/> International (List nations or regions served below alphabetically)						
Burundi, Democratic Republic of the Congo, Dominican Republic, Ethiopia, Haiti, Mexico, Tanzania, Thailand							
S.W.O.T. ANALYSIS							
STRENGTHS	WEAKNESSES		OPPORTUNITIES		THREATS		
- 35+ years of experience - A proven model that is backed by multiple short and long-term studies - Strong community participation and support from churches, governments, etc.	- Our holistic program is difficult to explain quickly to the mass market - Environmental change and community development take time (6 to 10 years)		- Watershed model allows scalability - Mobilizing a movement of US churches to compelling and effective action - Supporters come from across the political spectrum & we often bring unity		- Well-intentioned charity work/handouts that undercuts long-term empowerment - Political, environmental, external volatility in areas where we work can slow progress		
SOURCE	Completed By: Corbyn Small			Date: 12/28/2020			

PARTICIPATION

Confidently execute your personalized giving strategy with the Excellence in Giving team.

“Martha Lu and I have grown a great deal in our joy, strategic approach and unity in our giving since beginning to work with you, and we want to thank you and your organization for being such a blessing in our lives.”

Kurt K. - CT Client

SAMPLE DELIVERABLES

Giving Dashboard

Prepared for **Smith Family** by **Excellence in Giving**

GIVING OVERVIEW

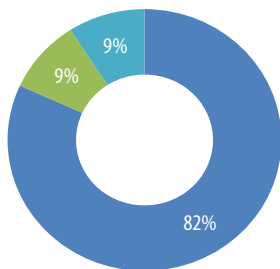
2021-YTD Total Giving	\$825,000
2021-YTD Total Orgs	4
5-Year Total Giving	\$3,150,000

Foundation Balance	\$2,981,371
DAF Balance	\$2,598,600
Total	\$5,579,971

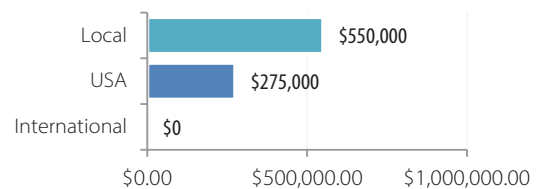
2021-YTD GRANT RECIPIENTS

Organization	Amount	Purpose	Topic
Brent's Place	\$475,000	Cancer Center Renovations	Healthcare
Damon Runyon Cancer Research	\$200,000	Yr 3/3 Support Cancer Researcher	Healthcare
Hope House Colorado	\$75,000	COVID-19 Emergency Fund	Humanitarian/Mercy Ministry
Angels of America's Fallen	\$75,000	Yr 1/3 - Move kids off waitlist	Personal/Social Development

2021-YTD GIVING BY TOPIC AND GEOGRAPHY



Topic	Amount
Healthcare	\$675,000
Humanitarian/Mercy Ministry	\$75,000
Personal/Social Development	\$75,000
Total	\$825,000



5-YEAR GIVING HISTORY



Year	Amount
2017	\$835,000
2018	\$742,000
2019	\$720,000
2020	\$863,000
2021-YTD	\$825,000
Total	\$3,150,000

Giving Forecast



Prepared for the **Smith Family** by **Excellence in Giving**

ORGANIZATION	2019	2020	2021	2021-SCH	NOTES
North Texas Cares	\$550,000	\$500,000	\$500,000	\$50,000	
University of Texas	\$250,000	\$250,000	\$250,000		Scholarships, \$1M Pledge; Yr 3 of 4
MD Anderson Cancer Center	\$250,000	\$250,000	\$250,000	\$250,000	Pancreatic Cancer, \$1M Pledge
International Justice Mission	\$25,000	\$75,000	\$75,000		
Texas Public Policy Foundation	\$50,000	\$50,000	\$50,000		
Americares	\$0	\$0	\$50,000		Hurricane Harvey
Aspire to Learn	\$20,000	\$15,000	\$30,000		
Dallas Afterschool	\$50,000	\$50,000	\$25,000	\$25,000	
CURE International	\$25,000	\$25,000	\$25,000		
Stand for Children	\$35,000	\$35,000	\$20,000	\$15,000	
The Bridge	\$29,000	\$27,000	\$10,000	\$15,000	
Boys and Girls Clubs	\$10,000	\$10,000	\$10,000		
Make-A-Wish Foundation	\$5,000	\$5,000	\$5,000		
Genesis Women's Shelter & Support	\$5,000	\$5,000	\$5,000		
Operation Kindness	\$5,000	\$5,000	\$5,000		
North Texas Food Bank	\$3,000	\$3,000	\$5,000	\$2,000	
ASPCA	\$6,000	\$6,000	\$2,000	\$4,000	
Goodwill	\$1,000	\$0	\$500		
Cook Children's Medical Center	\$50,000	\$250,000	\$0	\$250,000	Capital Campaign Pledge
Positive Coaching Alliance	\$100,000	\$100,000	\$0	\$100,000	Pledge Complete
Ronald McDonald House	\$25,000	\$25,000	\$0	\$25,000	
Peoples Health Clinic	\$11,000	\$11,000	\$0	\$5,000	
United Way	\$10,000	\$10,000	\$0		Tocqueville
American Heart Association	\$1,000	\$5,000	\$0		
Texas Ballet Theater	\$5,000	\$1,000	\$0		
Fort Worth Zoo	\$500,000	\$0	\$0		\$1M Pledge; \$500K due upon match
Total	\$2,021,000	\$1,713,000	\$1,317,500	\$741,000	

2021 Projected Giving:

\$2,058,500

CELEBRATION

Witness the results of high impact giving and experience the joy of generosity.

“Being able to do this joyfully would not be possible without Excellence in Giving. We could not be successful in our grant making without you.”

Paul K. - CT Client

SAMPLE DELIVERABLES

IMPACT REPORT FOR **FOOD FOR THE HUNGRY**

\$100,000 gift made in January 2021



GRANT PURPOSE

To provide opportunities for youth and families in the Ixil region in Quiché, Guatemala to complete middle and high school education

The COVID-19 pandemic and hurricanes generated difficult conditions for families in the Ixil region this year. In the midst of it all, this project reached many students who would have dropped out of their studies. Food for the Hungry worked hard to stay in constant contact with families to expand and reinforce biblical world-view trainings, reminding them that God's plans for them are good. Thus far, 1,210 students have been impacted, as well as parents and community leaders who are now empowered to support the dreams of their youth.



Miriam Susana receiving a visit from Food for the Hungry.

Only 20% of adolescents and youth in the Ixil region have access to secondary education opportunities.



PERSONAL STORY

Miriam Susana Gómez Pérez is a student at the nursing school who is passionate about using her profession to live out God's calling on her life to serve her community! She said, "Thank you for the opportunity to be a part of the scholarship program this year. I hope that God blesses you and the other students! I appreciate the spiritual and financial support each month, as well as the motivation and visits that I've received from the Food for the Hungry staff. The support they give me emotionally to achieve my dreams is so valuable." Susana dreams of graduating as a nurse assistant, with a desire to serve her neighbors and pursue a university degree in medicine. She is embracing God's plans for her life and looking to the future with great expectancy and hope!

THANK YOU

Food for the Hungry is so thankful for your love for Ixil families! Amidst the hard times this past year, this project has reinforced trainings, displaying the hope and provision of God to the youth and their families. It is an honor for us to be channels of blessing through your generous contribution. Thank you for being a blessing!

RESULTS

1,000 SCHOLAR KITS ISSUED

1,000 middle school students have been directly supported and impacted by this project through the distribution of scholar kits and expanded access to community trainings.

210 SCHOLARSHIPS PROVIDED

In 2020, 210 high school students received scholarships enabling them to continue their studies. Their families received training on the importance of education through a biblical world-view.

SERVICE TRIPS

How do you help the next generation understand international charitable giving? **...show them!**

Excellence in Giving creates customized trips for client families who have interest in global causes. Trips are more comprehensive than typical donor "vision trips" that major international organizations organize.

Excellence in Giving clients see projects in places that are selected with the family's priorities in mind. Each trip is customized for your family and includes a client defined blend of (1) education, (2) service, and (3) fun.

Education

Learn about cultural dynamics in communities around the world

Expose your family to global challenges and understand the solutions being offered

Service

Observe organizations effectively meeting community needs

Participate in service projects in partnership with local organizations

Experience the satisfaction of making a difference in someone's life

Fun

Visit internationally renowned hotels, restaurants, and entertainment venues

All you have to do is show up! Excellence in Giving, LLC provides everything you need:

Customized trip itinerary

Pre-trip instructions

Excellence in Giving trip guide

Personalized trip journals

Knowledge of best-in-class international programs

BENEFITS

- Meet the people whose lives are improved by your gift
- Expose your family to the world's needs and learn the most effective ways to help
- Create lasting family memories through exciting adventures and service projects

Excellence in Giving organizes trips for the families we serve on a regular basis. Clients are guaranteed the most highly recommended and safest accommodations and transportation that each country has to offer. In the last few years, Excellence in giving has planned and successfully executed a number of client trips, including:

4-Day Dominican Republic Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how micro-finance, water purification, and sustainable agriculture is changing lives
- Install fuel-efficient stoves in poor households to reduce respiratory illness and fuel costs
- Create lasting family memories through exciting adventures and service projects

6-Day Kenya Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how micro-finance, micro-franchises, and livestock empowerment programs change lives
- Kids play soccer with African children at holistic sports outreach center and come to love them
- Experience an African safari and then the Atlantis resort in Dubai on the way home

8-Day India Trip

- Meet with children and families whose lives have been radically improved through your giving
- See how medical kiosks, private education, and economic empowerment programs change lives
- Kids ask questions and witness firsthand the philanthropic values of their parents
- See the Taj Mahal, watch snake charmers in action, and visit the famous Ganges River



EXCELLENCE IN GIVING TEAM

AL MUELLER *President*



Mr. Mueller founded Excellence in Giving in 2001 after 20 years of providing investment advice to major institutions and wealthy families. During his career at Morgan Stanley and UBS, Mr. Mueller evaluated investments in virtually every asset class. His clients relied on his ability to evaluate risk and reward of the investments in their portfolio. Mr. Mueller used his investment background to launch excellence in Giving with a desire to help clients achieve high-performing philanthropic portfolios. The world-class team that Mr. Mueller assembled has been acknowledged as the premier provider of advice for values-based giving.

Since 2001, Mr. Mueller and his team have advised their retained clients on over \$400 million of charitable gifts. The Excellence in Giving clients give with great confidence and are able to celebrate the results of their gifts. Al's proven service and advice to families makes him one of the most respected and sought-after thought leaders in philanthropy today. Mr. Mueller played football at Brown University, graduated from the University of Arizona, and holds an MBA from the Anderson School of Management at UCLA. He and his wife, Susan, have three adult children. Al and Susan appreciate the challenging game of golf, mountain adventures, and ski slopes that the Rocky Mountains provide.

THOR IVERSON *Chief Financial Officer*



Mr. Iverson brings a personal and professional passion for wise stewardship and high-impact giving to the role, having served as chief financial officer for family-owned businesses with high capacity, philanthropic owners. Thor brings more than 20 years of senior management experience to Excellence in Giving including executive positions at Echelon Corporation, BeAtHome.com, Amity Technology, Concord, Inc., and Great Plains Software. Mr. Iverson's professional experience includes extensive international business in Russia, Ukraine, and Scandinavia. He received his MBA from Stanford University and his B.S. in Computer Science and Business Administration from North Dakota State University. Mr. Iverson is a published author and a patent holder. He lives in Colorado Springs with his wife Dana and their two children.

OLIVIA PELLER *Executive Assistant and Office Manager*



As the Executive Assistant and Office Manager, Olivia keeps the headquarters operating at high speed and helps make everyone on the team better! Olivia supports the team day-to-day in a variety of ways so we can best serve our clients and partners. She manages scheduling, event planning, HR, office management, and the many other moving pieces that bring excellence and continuity to our growing organization. Olivia received her BA in Communication and Health Promotion from the University of Wisconsin Whitewater. She brings her dynamic breadth of experience working in industries such as healthcare, insurance, personal injury, and entrepreneurial start-ups. In her spare time, she enjoys traveling, spending time with her family, and exploring Colorado's outdoors with her coonhound, Beckett.

PAUL PENLEY, PH.D

Managing Director, Research Division

Dr. Penley manages the company's research division and leads projects to inform effective grantmaking strategies. He has refined methods for nonprofit due diligence and tracking post-grant impact. He has completed on-site evaluations in a dozen countries around the world. Dr. Penley specializes in creating outcome measurement systems for internal and external reporting of program effectiveness. He has presented his approach at community foundations, Philanthropy Roundtable meetings, and Yale Philanthropy Conference. He has published research insights in *Alliance* magazine, *Planned Giving Today*, and *OUTCOMES* magazine. Dr. Penley designed the firm's Community Assessments and Strategic Gap Analyses so clients can find and fund charities that fill strategic gaps and get results. He created our charity evaluation platform and analytics where subscribers can assess nonprofit performance and impact using up-to-date, in-depth data. Paul is a published author, an avid blogger with 60,000 readers, and an adjunct professor. He resides in Colorado Springs with his family where he enjoys fly fishing the endless trout streams in Colorado.



JESSICA BOCKER

Managing Director, Client Services

Mrs. Bocker leads the Client Services initiative to support each client's unique giving passions and priorities. She brings diverse experience in operations management, customer service, marketing, public relations and human resources. Jessica served as Vice President of Operations and Marketing at Biowatch Medical, a medical device and service company headquartered in Columbia, SC. In this position, she was effective in improving the quality of customer service and scaling the company's operational capacity. Jessica joined Excellence in Giving in 2011 to help ensure that every client experiences the joy and significance of giving well. Jessica is a graduate of the University of South Carolina where she studied English and French. She studied in France and expanded her understanding of international culture with visits to a dozen other European countries. She lives in Colorado Springs with her husband and two young children where they enjoy time as a family and being outdoors.



JEDD SCHROY

Director of Evaluation

Mr. Schroy is a gifted leader, an optimist, and a builder of people and processes that deliver results. He began his career in financial services before co-founding an organization developing African entrepreneurs. Determined tenacity, strategic analysis, problem solving, capacity building and creative thinking have been hallmarks of his career. Jedd joined Excellence in Giving in 2019 to contribute to the success of clients and organizations investing in the most pressing and important work of our time. Jedd has traveled, worked and served in more than 40 countries. He is a graduate of Oral Roberts University with a degree in International Relations and Business Administration. Jedd is a published author, speaker, and lifelong learner. His favorite topics are economics, redemptive entrepreneurship, and theology. A native of California, he still calls it home in his heart. Jedd loves traveling with his wife and four daughters. He enjoys photography, storytelling, and traveling.



EXCELLENCE IN GIVING TEAM

RACHEL TOMLIN

Client Services Advisor



Rachel Tomlin is eager to support clients and relationship managers through project management with the goal of total client satisfaction. Rachel has a passion for people, communities, and impact. Prior to her work at Excellence in Giving, Rachel worked with various nonprofits and social impact businesses where she discovered her heart for advocacy and public policy. She brings experience in nonprofit leadership, grant management, and start-up entrepreneurship. She received her bachelors degree from Hope College and is currently pursuing her MBA at Colorado State University. Originally from Northern Michigan, Rachel lived briefly in England and is now happily settled in Colorado. In her spare time, you can find her outside, running, or hanging out with her two golden retrievers, Dani and Leela.

MATT ASPEGREN

Investment Officer, Kingdom Giving Fund

As an Investment Officer for Kingdom Giving Fund, Mr. Aspegren performs in-depth research on nonprofit organizations to help investors give strategically while nonprofits they support get even better. Mr. Aspegren has served as nonprofit founder, chief executive, board member, consultant, and evaluator before joining Excellence in Giving. Mr. Aspegren briefly worked as a corporate analyst before moving to the Philippines in 2009 to join IJM's Project Lantern, funded by the Gates Foundation. In 2010, he co-founded international human rights agency, 10ThousandWindows, where he served as CEO for six years and as a board member for seven. Mr. Aspegren earned a degree in Business Administration and Psychology from John Brown University. Matt was awarded one of four annual graduate fellowships from Soderquist Leadership to complete an MBA. Matt lives with his wife and daughter in Austin, TX, where he enjoys his family and all things sports.



HEIDI GAYLE

Client Services Support Specialist



Mrs. Gayle tracks historical and future grant data and creates recurring and ad hoc reports to communicate giving trends for Excellence in Giving clients. She manages the Grant Impact Reporting process by documenting information, communicating with nonprofits, and providing succinct, customized reporting products. Mrs. Gayle was born and raised in Illinois where she spent her youth playing softball and basketball. Her family spent many summer days on the Rock River boating, waterskiing and jet skiing. In 2009, Mrs. Gayle earned a B.A. in Mathematics and Teaching Mathematics from Augustana College in Rock Island, IL, where she graduated Summa Cum Laude. She taught mathematics at the middle school and high school level. She also taught College Prep Math Courses at Pikes Peak Community College as an Adjunct Mathematics Instructor. Heidi came to Excellence in Giving after working on the financial services team for the Navigators.

ELIZABETH WALLACE

Associate

As the Associate in the Relationship Management Division, Ms. Wallace is honored to serve client's specific needs and work on special projects for the President, Al Mueller.

Prior to her time at Excellence in Giving, Elizabeth worked for a variety of nonprofits, interacting with donors and ministry leaders from around the world. She enjoys international travel and overseas missions. Some of her experiences include teaching a literacy enhancement program in Nassau, Bahamas, speaking at evangelism conferences in Bangkok, Thailand, and the Dominican Republic, and starting an audio-Bible initiative in central Africa. Elizabeth brings experience in project management and cross-cultural communication to the table. She received her bachelor's degree in Religious Studies from Baylor University where she held leadership roles in Chi Omega, Unbound Ministries, and Pine Cove Christian Camps.

Originally from Dallas, Texas, Elizabeth, with her love for the mountains is now settled in Colorado. Elizabeth loves skiing, backpacking, running, or growing her local art and calligraphy business.



JACOB MCCLURE

Senior Research Associate

Mr. McClure has collected and analyzed data for topical research, community assessments, and impact measurement at Excellence in Giving since 2015. His duties include managing, updating, and providing quality control for the company's nonprofit analytics database, which assesses the health and performance of many diversified charities. Jacob maintains strong relationships with nonprofit leaders and helps them enter all data points in the analytics form clearly and accurately. Jacob earned his Bachelor's of Science degree in Business Administration at the University of North Carolina in 2015. He attained a Graduate Certificate in Nonprofit Management at the University of Colorado in 2018 and is currently pursuing a Master's degree in Public Administration. Outside of work, Jacob enjoys hiking, running, and biking on the trails of Colorado Springs, and spending time with his Siberian Husky, Mia.



TIM VAN VUGT

Research Analyst

Mr. Van Vugt sets up systems to measure program outcomes for charities that Excellence in Giving clients support. He specializes in designing research plans and analyzing impact data to evaluate program effectiveness and recommend improvements. Mr. Van Vugt earned a BA in Finance from Calvin College and an MA in International & Development Economics from the University of San Francisco. He began his career in Kenya working with microfinance institutions and has extensive experience with a variety of international development organizations and social enterprises around the world. Before joining Excellence in Giving, Mr. Van Vugt worked as an independent consultant, helping nonprofits better measure and understand the impact of their programs. He has led rigorous research projects in several countries throughout Africa and Latin America for clients including Compassion International, Living Water International, and Partners Worldwide.



EXCELLENCE IN GIVING TEAM



KEITH WAGGONER

Regional Philanthropy Advisor, Texas

During his 30 plus year career, Mr. Waggoner has gained expertise in leading teams of people, building relationships, developing processes to achieve a vision, honing entrepreneurial skills, and transitioning organizations in need of change. He began his career in real estate in 1985 and spent time developing his commercial real estate skills. In 1997, he joined Macfarlan Real Estate Investment Management where he was responsible for all of the firm's commercial asset management and corporate operations. He helped launch nonprofit Behind Every Door Ministries, Inc in 2009. Behind Every Door combined private real estate investment partnerships, which purchased C-grade apartment communities, with a nonprofit entity for the purpose of improving the lives of the residents and transforming communities. Behind Every Door is making a tremendous impact on two very underserved neighborhoods in Dallas. Keith was born in Little Rock, Arkansas and raised in Wheaton, Illinois. He moved to Texas to pursue his Bachelor's degree in business at Baylor University and holds his MBA from Southern Methodist University. Keith is an avid golfer, enjoys photography, and tries to find time to read good books. He lives in Dallas with his wife and has two grown children.

Frequently Asked Questions

Why do families choose to be Excellence in Giving Clients?

It's simple, really. Families are drawn to us for three main reasons: our expertise in the philanthropy sector, our client customization, and the increased joy we facilitate in their giving. Our services create a disciplined, yet flexible process for intelligent giving. We help clients prioritize gifts in areas that are important to them and bring them the most joy. Clients give confidently because of the services we provide in due diligence, reporting, and measurable results.

When should someone consider becoming an Excellence in Giving client?

We serve families who seek to maximize the impact of their charitable giving. Our services encompass those typically provided by a foundation executive director. Families who have the capacity to give over \$500,000 annually will find the most benefit from our services.

Does Excellence in Giving decide where their clients will give?

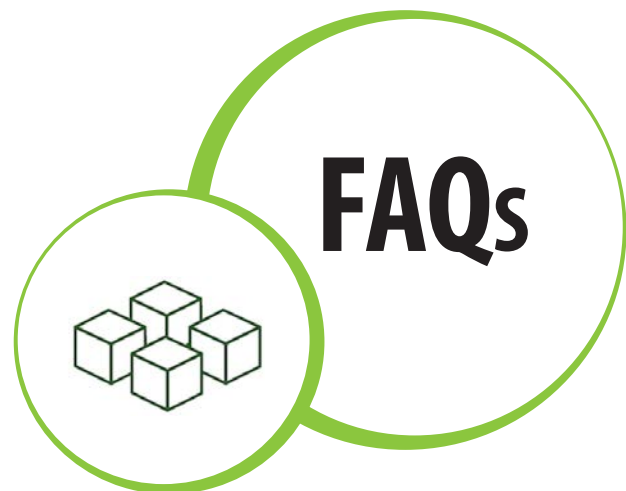
Absolutely not. Our goal is to increase the confidence and the joy our clients experience from their charitable giving. We do that by helping our clients discover the areas and organizations where they are passionate. We are happy to make recommendations on organizations we trust. At the end of the day, we are here to make the process easier and the joy greater.

How does Excellence in Giving charge for services?

We are a fee-only professional services firm. We send a written service agreement with our rates based on projected work effort. Fees can be based on a specific project or on an annual retainer. We don't take a percentage of grants, and we don't charge you more if you give more. We believe in totally satisfied clients, and if our clients aren't totally satisfied we will adjust their bill or provide additional services at no charge. As a bonus, our fees are fully tax-deductible as a legitimate giving expense.

Why doesn't Excellence in Giving charge a percentage of charitable giving?

Alignment of interests. Excellence in Giving never wants clients to think there is any motivation to increase clients' annual giving in order to increase profit. Charging for services rendered is best for all parties and allows clients to have a variable expense they control.



How often does Excellence in Giving meet with its clients?

Our approach is customized to the needs of each client. We recommend at least three client meetings annually to make decisions on grant requests, review grant activities, and celebrate results. Phone calls are scheduled as needed to implement and monitor grant progress. Travel costs for regularly scheduled meetings are included in the full-service engagement.

Can Excellence in Giving help me train my children?

Yes! We believe one of the most important gifts you can give your children is wisdom along with wealth. By involving and educating children of all ages, parents can use family giving as an opportunity to pass on their values and teach lessons of stewardship. This is one of our areas of expertise, and we love to provide education and resources on next generation philanthropy.

Why should I pay someone to help me give money away?

Writing a check is easy; making a lasting impact is difficult. The wealthiest men of this generation have publicly stated that "it is more difficult to give money away intelligently than it was to make it." Sorting through worthy causes and making wise giving decisions is a challenging and time-consuming task. Excellence in Giving provides an unparalleled level of service while offering our clients complete control and freedom in their giving decisions. To sum it all up, through Excellence in Giving, our clients gain confidence in the organizations they support, receive updates on projects, and celebrate the impact their gifts have made.

HEADQUARTERS

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ExcellenceinGiving.com

BRANCH OFFICE

Dallas, TX



Excellence in Giving
the joy of generosity