

Make a difference.
Not just a donation.

Excellence in Giving Services

GIVING STRATEGY DEVELOPMENT

■ Discovery Process \$2,500-3,500

SERVICE PROVIDED: EIG executes 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.

DELIVERABLES: *Joy-Filled Giving Profile* (a philanthropic mission statement with giving priorities and values)

CLIENT INVOLVEMENT: Review questionnaire and participate in one 2-3 hour in person meeting

■ Giving Game Plan \$2,000-3,500

SERVICE PROVIDED: We chart, review, and analyze your previous giving to evaluate your level of satisfaction and to help you forecast future giving. The results define the priorities, scope, and objectives of your future charitable investments.

DELIVERABLES: *Giving Game Plan* (establishes giving targets for geographic and program areas based on overall mission)

CLIENT INVOLVEMENT: Provide history of past giving and participate in follow-up 2-3 hour meeting

EVALUATING GIVING OPPORTUNITIES

■ High Impact Giving Opportunities Research \$10,000-50,000

SERVICE PROVIDED: EIG researches organizations in a particular geographic area focused on a particular local problem or population to determine the best giving opportunities. As a result, clients can make informed, high-impact giving decisions.

DELIVERABLES: *High Impact Giving Opportunities* (list and description of 5-10 of the best organizations in a particular area)

CLIENT INVOLVEMENT: Initial meeting to establish area(s) interested in funding effectively

■ Organizational Evaluation (OE) \$1,000-25,000

SERVICE PROVIDED: EIG evaluates organizations before you give. We perform 5 levels of organizational evaluations ranging from an overview (level 1) to a comprehensive evaluation on site that includes an industry analysis (level 5).

DELIVERABLES: *Organizational Evaluation Report* (a topically organized analysis with investor recommendations)

CLIENT INVOLVEMENT: Review and discuss report with EIG representatives to make an appropriate giving decision

PHILANTHROPIC TRAINING AND PARTICIPATION

■ Philanthropic Coaching \$1,500-2,500 per quarter

SERVICE PROVIDED: EIG reviews current giving and advises clients on future giving during bi-annual or quarterly meetings. In addition, EIG is available by phone for occasional consultation on strategic giving decisions/opportunities during the year.

DELIVERABLES: Improved giving impact and satisfaction through access to EIG's expertise and established network

CLIENT INVOLVEMENT: Bi-annual or quarterly meetings scheduled at the client's convenience

■ G2 Philanthropic Training Exercise \$1,500-2,500 per child

SERVICE PROVIDED: To train the next generation in effective philanthropy, EIG provides level 2 organizational evaluation reports (w/o analysis) on each child's chosen organization and then facilitates a meeting about how to evaluate them.

DELIVERABLES: Level 2 Due Diligence reports with instructions and space for G2 to practice evaluating the organizations

CLIENT INVOLVEMENT: G2 initially chooses organizations to evaluate; G2 participates in half day training discussion

■ Customized Service Trips \$2,500-3,500 per day of trip

SERVICE PROVIDED: Based on the client family's interests, EIG creates an itinerary with elements of [1] service (in partnership with local organizations), [2] education (about community needs and effective solutions), and [3] fun (make memories).

DELIVERABLES: Customized trip itinerary; pre-trip instructions; trip guide; trip budget; trip journals and photobook

CLIENT INVOLVEMENT: Pre-trip meeting; itinerary review; prepare for and participate in the planned trip

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■ Grant Management

OE Price + \$500-1,500

SUMMARY: When a client decides to fund an organization after the organizational evaluation report is complete, EIG can (1) manage communication with the organization, (2) arrange funding, and (3) provide periodic quality reporting.

DELIVERABLES: "Because of Your Gifts" Organizational Progress Reports (collected quarterly or biannually)

CLIENT INVOLVEMENT: Read reports on the impact that resulted from your strategic investment in the organization

■ Partnership for Organizational Improvement

\$2,000-5,000 per month

SERVICE PROVIDED: EIG will guide a researched organization through the implementation of recommendations for organizational improvement established during the evaluation process.

DELIVERABLES: A donor increases the impact from their donation through EIG's strategic partnership with the organization

CLIENT INVOLVEMENT: Get approval from organization for EIG's partnership in implementing recommendations

■ Gift Matching and Leveraging

10% of gift (if EIG matches 20% of gift or more)

SERVICE PROVIDED: When a client wants to leverage their gift to a researched organization, EIG will attempt to find matching donations from other funders in their philanthropic network or creatively leverage the gift to increase ROI.

DELIVERABLES: Increased impact from donor's gift through leveraged giving and EIG's network of funders

CLIENT INVOLVEMENT: Minimal

■ Catalytic Philanthropy

Price varies

SERVICE PROVIDED: EIG can help you leverage your influence, host an event, or promote a cause so that your time and energy stimulates multiple sources of support and advocacy for an organization or project you believe in.

DELIVERABLES: Varies greatly. *Example:* Host private concert at your home to expose your circle of influence to a cause.

CLIENT INVOLVEMENT: Varies greatly

■ Corporate Generosity

starting at \$5,000 per quarter (based on company size)

SERVICE PROVIDED: Develop and manage matching gift program, employee service trip program, and community service days and programs that align with a company's values and capacity.

DELIVERABLES: Corporate Generosity Program

CLIENT INVOLVEMENT: Initial and ongoing meetings to establish a program that matches company values

■ Giving Advisor

\$25,000 per year

SERVICE PROVIDED: EIG provides: (1) the Discovery Process, (2) full Grant Management, (3) High Impact Giving Opportunities, (4) Philanthropic Coaching, (5) the Giving Game Plan, and (6) Giving Dashboards and Forecasts.

DELIVERABLES: *Giving Profile, Giving Game Plan, Giving Dashboards, Giving Forecasts, Organizational Progress Reports, etc.*

CLIENT INVOLVEMENT: Varies based on client's preference.

■ Full-Service Giving Advisor

\$50,000-90,000 per year

SERVICE PROVIDED: Includes all services described above (excluding corporate generosity) with a set number of due diligence reports. It may include discounted donor-advised fund rates and technological/administrative infrastructure for foundations.

DELIVERABLES: All services provided to run a high-quality, high-impact foundation

CLIENT INVOLVEMENT: Varies based on client's preference.

MAXIMIZING A GIFT

CORPORATE

FULL SERVICE OPTIONS