

EXERCISE 7.2

Evaluating How an Organization Meets Your Goals and How You Meet Its Goals

45 minutes

You may need to complete this exercise in two stages. First, answer all the questions that you can based on what you know and any materials you have from the organization, such as a fundraising letter or proposal and general informational materials. If you have unanswered questions at that point, you may need to talk to someone at the organization.

1. **Mission:** What are the stated goals of the project or organization I am considering giving to? Do they seem realistic? How do they fit with the following aspects of my giving plan?

2. **Strategy:** How is this project working on the needs it is addressing? Does the work seem to be effective—that is, are the strategy and the actions to carry out that strategy contributing to change in the desired direction? Does this program or group reach the people I want to have an effect on? Are enough people reached?

3. **Impact:** What impact will my giving money or time to this program, person, or group have? How much of a difference will it make? Is this a small group that my donation will have a large impact on? Or a large group that it will have moderate impact on?

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4. **Time:** What is the short-term outcome of this work projected to be? What long-term outcome is projected?

5. **Timeliness:** Does this project need to be funded now? What would the impact be if it were shelved for a while?

6. **Type of donation:** Will this be a donation (tax-deductible or not)? A no-interest loan?

7. **Volunteer time?** What will my role be?

8. **Decision-making:** Do I have the information I need to make a thoughtful decision?

9. **Alternative prospects:** Are there other places or ways that this group or project could receive the funding they are asking of me? Is it possible for them to do so?
