



CHARITY NAVIGATOR
Your Guide To Intelligent Giving

TOP 5 GIVING STRATEGY TIPS THIS HOLIDAY SEASON

charitynavigator.org



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Shared with you by Charity Navigator

Charity Navigator, the world's largest and most-utilized independent nonprofit evaluator, empowers donors of all sizes with free access to data, tools, and resources to guide philanthropic decision making. Through Charity Navigator's ratings, nonprofits are equipped with the nonprofit sector's premier trust indicator and a powerful platform to raise awareness and funds.

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TIP 1

Ensure the organization you are supporting is efficient and impactful



How can you be sure the organization is legitimate?

You want your donations to count, so, at the very least, you want to be confident that the organization you are choosing to support is legitimate. But how? Trying to analyze the legitimacy of an organization on your own can be an arduous task without the right tools. Using resources, such as Charity Navigator, can make this process a breeze. Here are a few elements you should confirm before making a hasty decision with your giving:

- **Verify the organization is a 501(c)(3) IRS registered nonprofit.** This classification ensures that the organization is tax-exempt and that 100% of your donation is tax-deductible to the fullest extent of the law.
- **Validate the organization's EIN.** Every 501(c)(3) nonprofit is assigned a unique Employer Identification Number (EIN) by the Internal Revenue Service. As a lot of nonprofits can have similar names, this ensures that you are validating/researching the specific organization you are considering supporting. You can search the EIN or the organization's name on Charity Navigator to find detailed information.
- **Check the organization's rating issued by independent evaluators.** Using a website like charitynavigator.org as a reference is a great way to review the organization's financial health, accountability, and programmatic impact. With more than 160,000 nonprofits evaluated by Charity Navigator, donors can give confidently to organizations of all sizes.

Understanding Charity Navigator's Rating Systems

In order to effectively utilize the services of a nonprofit evaluation site like Charity Navigator, it is important to understand the systems used to rate organizations. Since 2001, Charity Navigator's Star Rating System has been the premier trust indicator of the nonprofit sector. In order to rate more nonprofits, Charity Navigator launched the Encompass Rating System in July 2020. You may be wondering, "How do these two systems differ?" Here are a few key differences:

Star Rating

- 9,000+ nonprofits rated
- 3-and 4-Star nonprofits recommended
- Includes larger, more established nonprofits
- Rates nonprofits on a robust set of financial and accountability & transparency metrics from IRS Forms 990 and expert analyst review

Encompass Rating

- 150,000+ nonprofits rated via a 0-100 numeric scale
- Nonprofits with scores 75 and above earn a 'Give with Confidence' attribution
- Nonprofits of all sizes rated
- Rates nonprofits on finance & accountability metrics from machine-readable sources and programmatic impact based on a cost per outcome methodology

TIP 2

Increase your support by leveraging a match

Giving at any level makes a difference in the causes you're passionate about, but consider increasing the impact of your giving by leveraging a match. Many organizations offer match incentives, and, through these, your donation can help to unlock the generosity of others. Utilizing a match requires no additional effort or monetary gift. By understanding how these matches work and when they take place, you can take advantage of them and exponentially increase the overall amount of support the organization receives!

Match incentives often come in one of two forms: a match campaign or a match challenge. Though a match campaign is a much more traditional approach, both allow the organization to double gifts in one way or another. Understanding the difference allows you to know how your money is being leveraged and when.

Here is a breakdown of each...

Match Campaign

A match campaign is the most common form of a match initiative. This is when every donation received within specific parameters -- time, amount threshold, or other specified conditions, is matched by an individual donor, family, or group that has pledged to make a significant financial contribution. The match could be 1:1, 2:1, and so forth, but the premise is that every donation made by a supporter is doubled or more.

Match Challenge

A bit more complex than a match campaign, a match challenge is when an organization solicits for donations immediately and their donations are used in a future match challenge campaign. For example, asking donors to give \$5 now and harnessing that gift in a few months as a part of a match challenge to get it matched.

Other Match Opportunities

Having your charitable gift matched by an organization is a generous opportunity for any donor, but did you know many corporations will match your charitable donations as well? Be sure to find out if your company (or your spouse's) matches tax-deductible donations as a benefit by reaching out to your human resources department! This is another opportunity to drive more funds to the nonprofits you support.



TIP 3

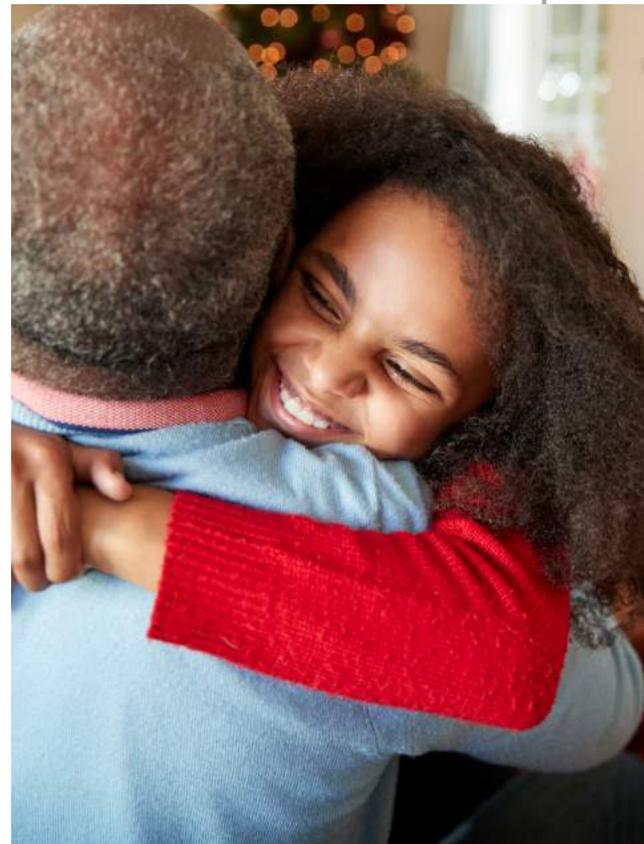
Share the gift of giving with your loved ones!

As great as it is for you to give, it is also great for you to inspire others to give as well! This holiday season into next year, consider creating a fundraiser as a fun and inclusive way to share the gift of giving with your friends and family.

You donate, you volunteer – so what else can you do to communicate your affection to charities you love? Peer-to-peer fundraising is an excellent way to increase charitable donations for organizations and causes you care about. By sharing your enthusiasm for this cause with your network and asking them to share in your charitable giving, you'd be surprised how many people would be willing to support you in this endeavor.

Whether your peer-to-peer fundraising will take place on a nonprofit's website, or through a fundraiser feature on a social media channel (e.g. Facebook fundraiser), getting the message out to as many people as you can is the most important aspect of peer-to-peer fundraising. Here are a few tips to ensure your fundraiser is effective:

- **Donate** – Always donate to your own campaign to get the ball rolling! You may not think it matters, but being the first donor can be a big mental hurdle for a supporter. Remove that hurdle by showing your friends you put your money where your mouth is.
- **Personalize** – Really emphasize the “why”. Why is this cause important to you and why does this organization or these organizations deserve your supporter's money?
- **Extend** – Allow your fundraiser to reach as many people as possible within the time you have! Even if you have reached your set goal, encourage your network to share with their own. There is no such thing as too many donations!



Gifts...but make them charitable!

Everyone loves to receive gifts, but this year, consider making those gifts meaningful. Whether it be for the holidays, your birthday, or another celebration, creating a peer-to-peer fundraiser and asking your friends and family to donate in lieu of a gift is a wonderful way to celebrate!

TIP 4

Consider donating stock to a charity

When deciding to open your wallet (and your heart) to a charity, you hope that your gift has the biggest impact on the cause as it can. As many donors automatically turn to their loose change, credit cards, and checkbooks, consider making an even bigger impact this giving season by donating long-term appreciated securities, such as stocks, bonds and mutual funds. Increase your gift and your yearly tax deduction in one!



Benefits of Donating Stock

When you decide to donate stocks to a charity, you are giving them more, in terms of value, without increasing the amount given, in terms of out of pocket cost. Giving appreciated stock is much more tax-efficient than giving cash because of the capital gains tax that you would have had to pay if you sold the stock now or in the future. When the security is being donated to a charitable organization, the total amount will be eligible for a tax deduction.

Many people like you give stock donations to impact the charity of their choice and they can save on two different types of taxes: by avoiding capital gains taxes and receiving tax deduction on federal and state taxes.

TIP 5

Sustainable monthly giving



When you find charities that you love, doing work that you love to support, donating to them feels easy. From the nonprofit's perspective, receiving donations from dedicated supporters is just as great! But as the year goes on, charities often find their incoming gifts ebbing and flowing depending on the season. The nonprofit sector has come to expect a year-end bump in donations, and the inevitable drop-off in the new year. This inconsistency often makes it hard for these organizations to plan effectively.

As donors, we have the power to change this pattern and provide the charities we love with more certainty and stability throughout the year. How? By breaking up our annual contributions and making smaller gifts on a monthly or quarterly basis. This recurring gift gives charities the opportunity to plan in advance, knowing they have a steady stream of revenue coming in.

Monthly gifts often allow a donor to be more generous, without even realizing it!

For example, a donor who contributes \$50 annually may consider making a monthly gift of \$5. At the end of the year, their total contribution will be \$60, meaning they were able to give an increase of 20% over the course of the year.



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We hope you have found our Top 5 Giving Strategy Tips to be helpful, and that you will use them to inform your giving this holiday season!

Though the holiday season often brings out the giving spirit in us all, it is important to recognize that nonprofit organizations, like Charity Navigator, operate all year round. Meaning, they count on donors, like you, to continue your generosity even after the giving season is over.

We encourage you to use Charity Navigator features to not only inform your giving, but help you to manage your donations, through our [Giving Basket](#) feature, and more!

Check us out at charitynavigator.org.

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