

Year-end giving: Looking beyond your mailbox Simple Gifts/Bill Somerville

Article Launched: 11/06/2008 03:40:15 PM PST



Editor's Note: This article is the sixth in a series on social engagement philanthropy.

AS THE New Year approaches, our mailboxes fill with solicitations for every imaginable cause. Many of the pitches are compelling and persuasive.

But how do we know whether these solicitations reflect productive organizations — or merely expert copywriting?

I've spent nearly four decades in philanthropy, and I firmly believe that the key to nonprofit effectiveness is strong, committed leadership. But you won't learn anything about a group's leadership by scanning its direct mail pitches.

How do you reach beyond the mailbox to evaluate a promising organization?

To begin, try thinking about your donations less as a "gift" than an "investment" in your community. When you're contemplating a financial investment to ensure your family's future, you certainly don't dash off a check in response to every mutual fund prospectus that appears in the mail. You consider your needs and goals. You research the fund. In a word, you take your investment seriously.

I advocate a similar seriousness with charitable donations. But I also want to suggest that giving in a significant way can be a source of immense personal satisfaction — even joy.

Take the opportunity to ask: What are the issues that mean the most to me? What kind of world do I want to leave to my children and grandchildren? How much am I willing to contribute to my vision of the future?

Then do your research. Ask people you respect for the names of nonprofit leaders they admire. (Outstanding people tend to know one another; they're natural guides in your search for nonprofit excellence.)

Visit the nonprofit's Web site. Drop by to get a feel for the place. Pick up the phone and schedule a visit with the organization's leaders.

Do the people in charge seem tough, resilient, courageous? Do they possess the necessary skills to achieve their goals? How do they handle adversity? What about past success? How's staff morale?

You won't get answers to all these questions. But your perspective will be broadened vastly simply by asking them.

If the group is incorporated with IRS 501(c)(3) status, your donation may be tax-deductible. Lacking such status, you can give through a public charity foundation such as Philanthropic Ventures Foundation (www.venturesfoundation.org).

Well-researched, thoughtful giving can be exciting — both intellectually and emotionally. By setting aside impulsiveness and acting wisely, you'll stand out as a valuable contributor to your community.

Bill Somerville, president and founder of Philanthropic Ventures Foundation, a public charity, in Oakland, has 47 years experience in human service and advising on private giving. His book, "Grassroots Philanthropy: Field Notes of a Maverick Grantmaker," was published this year by Heyday Press. Philanthropic Ventures Foundation's Web site is www.venturesfoundation.org, and Somerville can be reached at 510-645-1890 or by e-mail at bsomerville@venturesfoundation.org, with any reader questions or suggestions.