



CENTER FOR ARAB
AMERICAN PHILANTHROPY

GUIDE TO
ARAB AMERICAN

Giving





OUR VALUES

Philanthropic Excellence

Integrity and Honesty

Empowering Communities

Improving Society

WELCOME TO THE GUIDE TO ARAB AMERICAN GIVING!

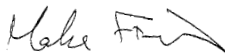
A Publication of the Center for Arab American Philanthropy

*"You give but little when you give of your possessions.
It is when you give of yourself that you truly give."* – Kahlil Gibran


In 2009, almost \$228 billion was donated by individuals to charitable organizations.* In fact, individuals give more to charitable organizations than foundations, corporations, and the government combined. However, many of us believe that our giving could make an even greater impact with the right tools and information. **We have all asked ourselves the following questions:** *How can I budget my giving more effectively? How much can I afford to give, particularly when considering the tax benefits? Can I take care of my family and my community at the same time? How do I know that my gift made an impact in the community? Does my giving reflect my values and passions? How can I give back to the Arab American community? How can I leverage my giving to have a greater impact? **Is my giving truly making a difference?***

In the following pages you will find information about how, what, and where to give more effectively. The Guide to Arab American Giving is not a legal document, nor is it designed to replace professional advice. However, it does offer useful tools and resources for becoming more strategic in your giving, making a greater impact, and experiencing an increased sense of satisfaction from your charitable activities. This Guide is designed to be a reference tool and likely will not answer all your questions, so we encourage you to contact a professional advisor and **visit the Center for Arab American Philanthropy (CAAP) at www.centeraap.org**. Our hope is that as you read the Guide and complete the worksheets, you will become more empowered and inspired in your giving, and confident in the knowledge that you are making a difference on issues and causes that matter the most to you. **Whether you give \$25 or \$25,000, you are building a legacy of giving for future generations.**

Sincerely,



Maha Freij
Deputy Executive Director/CFO
ACCESS



Hussien Y. Shousher
Advisory Board Chair
CAAP

*Source: Giving USA Foundation



THE GUIDE TO ARAB AMERICAN GIVING

A Publication of the Center for Arab American Philanthropy

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THE CENTER FOR ARAB AMERICAN PHILANTHROPY

The Center for Arab American Philanthropy (CAAP) promotes, facilitates, and celebrates Arab American giving through education, training, and donor outreach and services. CAAP, a project of ACCESS (Arab Community Center for Economic and Social Services) in Dearborn, Michigan, is the only program in the country harnessing the collective power of Arab American giving and knowledge to strengthen the voice of our community in American civil society.

OUR VISION

The Center for Arab American Philanthropy is the catalyst for improving lives and building vibrant communities.

OUR MISSION

The Center for Arab American Philanthropy strengthens Arab American giving by establishing charitable legacies through education, grantmaking, and endowment building.



**CENTER FOR ARAB
AMERICAN PHILANTHROPY**



OUR CORE FUNCTIONS

AMBASSADORS OF PHILANTHROPY

We inform, educate and inspire philanthropy in the Arab American community through the Center for Arab American Philanthropy and other philanthropic organizations.

BUILDERS & STEWARDS OF COMMUNITY RESOURCES

We build and manage the philanthropic resources of the Arab American donor community.

SERVICE PROVIDERS TO DONORS

We work with donors to fulfill their philanthropic goals within and beyond the Arab American community, to maximize the impact of their philanthropy, and to provide research on charitable organizations for informed giving.

GRANTMAKERS

Through our grantmaking, we strengthen Arab American and other nonprofit organizations and improve communities.

Through the Center, Arab Americans are telling their own story about their contributions as Americans and are building organizations to strengthen Arab American history, culture, and leadership. Together, we are creating a permanent institution to ensure that nonprofit organizations addressing the needs of the community will have the ability to serve for years to come.



STRATEGIC PHILANTHROPY

A TRADITION OF GIVING

Arabs have long practiced the tradition of giving. Deeply rooted in a culture that values community and family, Arab Americans have founded community organizations, supported new immigrants, and met humanitarian needs in the United States and the Arab world.

Philanthropy is central to the Arab American experience and a powerful sense of shared responsibility has sustained and empowered newly transplanted and longstanding Arab American communities in the United States. While Arab Americans have always given, they have only recently embraced formal philanthropy as a tool for community empowerment and addressing the common good.

What is Strategic Giving?

Many of us are philanthropists; we give time, expertise, cash, and more. However, very few of us think about how to give strategically, treating our contributions as investments rather than gifts. Strategic philanthropy is results-oriented, proactive rather than reactive,

strives to make the maximum impact, and has the potential for leveraging other funds. Donors should ask themselves the “so what” question: *So what difference is my gift making?* This kind of giving goes far beyond an annual gift to a charity, requires advance planning, and attention to results.

Measuring the impact—knowing how an organization has used your gift — is a crucial step towards making your giving strategic. If you want to determine how an organization has used your gift, contact the organization’s fiscal or development department. Or, take advantage of the services offered by an organization like CAAP to help you plan your gift, conduct due diligence on the potential recipient and monitor the impact.

WHAT DOES PHILANTHROPY MEAN TO ARAB AMERICANS?

Philanthropy is the giving of **time and money** for the greater community, often out of religious tradition.

Philanthropy is giving of **yourself** – a selfless contribution.

Philanthropy is an emotional endeavor. Arab American giving is motivated by a strong **cultural commitment** to family and community.

Philanthropy is about more than giving for personal satisfaction and individual growth. It is about **empowerment and strength** for the community as a whole.

Philanthropy allows Arab Americans to find **pride in their heritage** and combat negative stereotypes.

From “Insights on Arab American Giving: A Report from CAAP”

DEVELOPING A COMPREHENSIVE GIVING STRATEGY

DETERMINE YOUR VALUES

The first step in thinking strategically about your giving is to focus on the issues you care about the most. Take some time to consider your answers to the following questions. Your answers will help guide your unique giving plan, including where, how and how much you want to give.

1. What motivates you to give?

Everyone has his or her own unique reason for wanting to give back. Some give to carry on the legacy of a family tradition, or because they have been personally affected by an issue or cause. Others give out of deeply rooted religious beliefs. And many give simply because they believe it is the right thing to do. Some appreciate the acknowledgement and

recognition, while others prefer to give anonymously. Understanding what motivates you is the first step in determining the right giving tools.

2. What are your passions and interests?

What issues and causes do you care about? While most of us know the causes that are closest to our hearts, we do not always

prioritize our giving to reflect our passions. After clarifying your priorities, you will be able to focus your giving — financial support or volunteer time — on making the greatest impact, and you can more comfortably decline requests for support that are not a priority.

3. Where do you want to make a difference?

Do you want to give locally, regionally, nationally, internationally, or a combination of the above? Thousands of nonprofit, non-governmental organizations throughout the world are doing good work, so deciding which geographic areas are important will help you locate a select number of organizations to support.

4. Which organizations are effectively addressing the issues and causes you care about?

Does the organization match your passions and values? How much money does the organization spend on programs versus administration? How do



you know that your gift is being used to make an impact on the issues you care about? Does the organization practice good governance in its financial and administrative policies?

5. What type of impact do you want to make with your giving?

Are you interested in supporting the ongoing programs and activities of an organization through annual giving campaigns? Or would you rather ensure the long-term sustainability of an organization by giving to its endowment? Do you prefer to support the operating and administrative costs of an organization or its programs and activities?

6. How much risk are you willing to take with your gift?

Are you more comfortable giving to well-established organizations with proven track records of success, or are you open to investing in new organizations or innovative programs offering

creative solutions to community problems? Both types of giving are needed, and you must decide for yourself what you prefer.

7. When do you want to give?

Are you willing to contribute funds or volunteer time while you are employed, or will you wait until retirement? Will you continue to give beyond your lifetime through a bequest by will or other trust instrument?

If you need more assistance with determining your values please see **WORKSHEET #1**, *Determining My Areas of Interest*, in the **Supplemental Worksheets** publication.

WHAT FACTORS DO ARAB AMERICANS CONSIDER WHEN DONATING?

Arab Americans consider their level of trust and personal relationship with organizations before giving.

Arab Americans consider the type of organization, including mainstream organizations, Arab American organizations, and international causes.

Arab Americans consider giving to a variety of causes, including education, youth development, humanitarian aid, and religious institutions.

Arab Americans carefully consider the leadership, accountability, programs, and reputation of an organization before giving.

From "Insights on Arab American Giving: A Report from CAAP"

NOW that you have had the opportunity to review your own passions and motivations for giving, on the following pages you will find information about the types of programs specifically impacting the Arab American community.



IMPACTING THE ARAB AMERICAN COMMUNITY

Arab American organizations have served the community for more than 40 years. These organizations address important community needs and interests, including arts and culture, health, social services and advocacy on behalf of the Arab community.

When you think about the organizations you want to support, consider the following examples and ask yourself what types of programs you feel passionate about.

Arts and Culture

Arab American institutions are committed to preserving and celebrating Arab and Arab American cultural heritage

through arts programming and cultural education. Arab Americans are strengthening their own cultural identity while telling the story of the true contributions of Arab culture and Arab Americans in America.

Youth Leadership

Arab American organizations are empowering youth of all ages to succeed academically,

socially, and professionally, and to become leaders now and in the future. Arab American youth are celebrating their cultural heritage, developing leadership skills in philanthropy and civic engagement, and building bridges with other communities.

Family Empowerment

Many Arab American families are faced with overwhelming challenges, including discrimination, limited English proficiency, cultural differences, and unfamiliarity with systems in the United States. Arab American organizations are empowering Arab American families through programs such as English as a Second Language, immigration services, access to health care, and employment assistance.



Civic Engagement & Community Empowerment

Arab American organizations are speaking out on behalf of the Arab American community and are empowering Arab Americans politically and civically. Through voter registration projects, civic education, and volunteerism activities, Arab Americans are fully engaging in their communities and the political process.



For assistance in deciding where to give, see **WORKSHEET #2**, *Assessing My Giving History* and **WORKSHEET #3**, *Determining Where to Give*, in the **Supplemental Worksheets** publication.



SURA ARTS ACADEMY MAKING AN IMPACT

SURA Arts Academy is a free, diversity-themed digital photography instruction program at the Arab American National Museum for sixth through ninth grade students in southwest Detroit. Using photography as a tool to create youth dialogue and participation, SURA, the Arabic word for photograph, provides students with digital cameras to photograph their communities as they see them, including work, food, religion, recreation, and family life. The students then discuss their photographs in sessions designed to strengthen cultural awareness among the area's diverse groups of Arab Americans, African Americans, Latinos, and others in primarily lower-income communities. Camille Charara, a SURA participant, said, *"In SURA Arts Academy, middle school students not only get free instruction in digital photography, they also learn to view their neighborhoods and the broader community with new eyes and in new and stimulating ways."*

WHAT TO GIVE

After careful consideration, you have chosen the issues you are passionate about and the organizations you want to support. The next question to ask is: What are the most advantageous assets to give? While you may not have sufficient cash to give a substantial gift, you may have other assets to consider for charitable donations.



Appreciated Stock

Stock returns provide a means for giving to the community. A gift of appreciated stock qualifies for a tax deduction based on the full market value of your stock. In addition, you also avoid capital gains tax when you transfer the appreciated stock to a charity.

Life Insurance

Gifts of life insurance are an often overlooked form of charitable giving. You name the charity of your choice as owner and beneficiary of the policy. You may either give a paid-up policy or continue to pay premiums.

Real Estate

Gifts of commercial, residential, or undeveloped real estate is an excellent way to support a charitable organization while saving thousands of dollars on income or estate taxes. Gifts of real estate secure a charitable

income tax deduction based on the fair market value of the property. Not all organizations accept donations of real estate, and those that do often require an independent appraisal.

Personal Property

In addition to real estate, you may have antiques, art, collectibles, equipment or other personal property that you would like to gift to a charitable organization. The benefit of personal property gifts is that they do not affect your current cash flow. However, if the item given does not directly relate to the mission and work of the organization, you may not be able to claim a full market value deduction on your taxes.

Retirement Assets

Retirement assets such as IRAs and 401(k)s are subject to significant estate taxes. Gifting retirement assets to a charitable organization decreases your estate taxes and allows you to maintain a steady income during your lifetime. If you decide to gift retirement assets to a charity, be sure to direct your gift by changing your plan's beneficiary designation form. If you only direct your retirement assets through your will, then the recipient will be subject to estate tax.

Time and Services

Giving is not only financial. One of the most beneficial gifts an organization can receive is your time and professional expertise. By becoming actively involved, not only will you have a greater appreciation for the strength and effectiveness of the organization, but also knowledge about how funds are being used and making an impact.



DEVELOPING YOUR CHARITABLE BUDGET

Deciding how much to give each year is a very personal decision, based not only on your resources, but also on how much of a difference you want to make through your giving.

Making Giving Part of your Budget

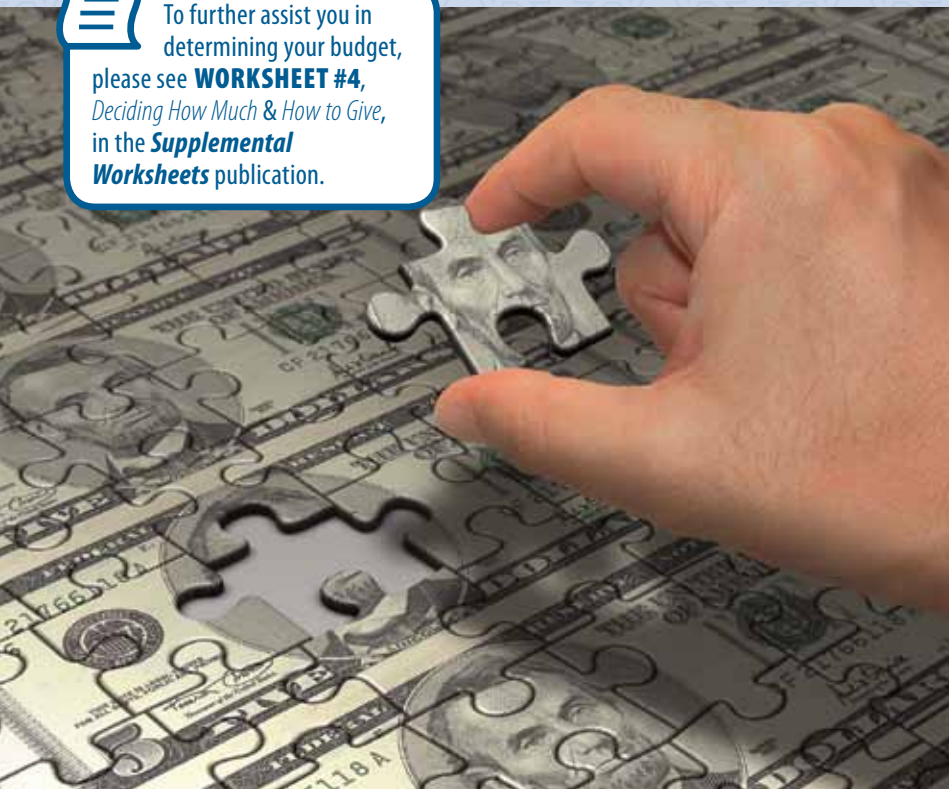
Regardless of how much you decide to give, it is important to incorporate your giving into your annual family budget, in the same way that you include your housing costs and other expenses. This ensures that you will have enough resources to give to the causes

you care about. With a clear understanding of your charitable budget, you also have more flexibility to give in response to emergency humanitarian crises.

In addition, by considering the value of the tax deductions, you may actually have the capacity to give a greater amount than you realize. If you donate \$1,250 annually, it may only cost you

\$1,000 when you factor in the \$250 in tax savings. Many websites, such as Charity Navigator at www.charitynavigator.org, provide giving calculators for individuals to enter their estimated charitable contributions and annual income or tax bracket. The calculator will then determine the average income tax deduction and potential financial impact.

To further assist you in determining your budget, please see **WORKSHEET #4**, *Deciding How Much & How to Give*, in the **Supplemental Worksheets** publication.



“When I get involved, I wear my nationality on my arm...when you get involved as an Arab American, you break down the barriers and the discrimination that some people have about Arabs.”

- James Jabara
Former mayor of Plymouth, MI

MAKING A DIFFERENCE BY GIVING TOGETHER

Combining your giving with others can be an effective and dynamic approach to philanthropy, and links you to donors who share the same passion for important causes.

Giving Circles

Giving Circles, also known as social giving clubs, are an emerging form of collective philanthropy rapidly gaining popularity among young professionals, women, and new donors. Members of giving circles collectively pool their funds, learn about community needs, and together determine where and how their gifts are granted. Giving Circles are often focused on particular communities or on common areas of interest.

In addition, Giving Circle gifts may be matched by community foundations, community organizations, or employer contributions.

"Giving should be entered into in just the same, careful way as investing ...giving is investing."

- John D. Rockefeller
Philanthropist

Employee Giving Programs

As an employee who cares about a particular organization in your community, you may have the opportunity to leverage your gifts through an Employee Giving Program. Many companies offer employees a matching gift program in which the company will match employees' gifts of cash and volunteer time to eligible

nonprofit organizations. In addition, companies often encourage their employees to give by organizing workplace giving programs for specific organizations and by facilitating payroll deductions for employees' charitable gifts. Your company's human resources or finance department can provide you with information about employee matching programs.



LEAVING A LEGACY: PLANNED GIVING

Once you have focused your giving and established relationships with organizations you trust, you may want to consider your long-term philanthropic plans. How do you want your philanthropy to uphold the values that are important to you for years to come? How will you leave your legacy in the community?

These questions can be addressed through planned giving. A planned gift is any charitable gift, immediate or deferred, that considers an individual's personal tax, financial, and estate planning circumstances. Planned gifts can be as simple as an outright gift of cash, or as sophisticated as a charitable trust or foundation that is integrated into a multi-faceted financial and estate plan.

Planned giving should involve the services of a professional advisor. A professional advisor can discuss your personal philanthropic goals with you, explain legal terminology, and detail the pros and cons of different giving vehicles — including how various options will affect your tax obligations.

Professional advisors may be:

- **Attorneys**
- **Financial Advisors**
- **Estate Planners**
- **Accountants**
- **Insurance Brokers**
- **Stock Brokers**
- **Philanthropy Consultants**



BENEFITS OF PLANNED GIVING

- Planned gifts have significant tax advantages
- Planned gifts can help minimize the estate tax.
- Planned gifts ensure the long-term support of organizations that you care about, even beyond your lifetime.

The following are **five examples** of the vehicles commonly used for planned giving:

1. Charitable Bequest

A Charitable Bequest is the simple act of writing a provision for a charitable gift into your will or revocable trust. In addition to your heirs receiving an inheritance, you can stipulate that a specific amount or percentage of your estate be given to a charitable organization. A bequest by will can be modified at any time and allows you to designate a gift for

the future, without impacting your current income or expenses.

2. Retained Life Estate

If you own a house or farm, a Retained Life Estate is an excellent way to contribute to charity while reducing your estate taxes. You may donate your personal residence or farm to a charitable organization while retaining the right to live on the property for the rest of your life, or for a specified period of time. In exchange for your gift, you will receive an immediate tax benefit. After your death, this gift will provide your estate with a charitable income tax deduction based on the fair market value of

your property, while supporting a charitable organization.

3. Charitable Lead Trust

A Charitable Lead Trust is an irrevocable trust with two beneficiaries: your designated heir and a charitable organization. You transfer an amount, known as the principal, into an irrevocable trust. For the rest of your lifetime, a charitable organization of your choice will receive a set percentage of income from the principal of the trust. At the end of your lifetime, the principal and all appreciation of the trust passes tax-free to your heirs.

VEHICLES PROVIDING AN INCOME FOR LIFE

4. Charitable Gift Annuity

With a Charitable Gift Annuity, you transfer cash or stock assets to a charitable organization. When you make a contribution to a Charitable Gift Annuity, you will receive a guaranteed income for life from the charitable organization. Fixed annuity payments can begin immediately or may be deferred until a designated time. Upon your passing, the principal of the annuity will transfer to the charitable organization. You will receive an immediate tax deduction the year the donation is made.

5. Charitable Remainder Trust

A Charitable Remainder Trust is an irrevocable trust with two beneficiaries: you and a charitable organization. You transfer an amount, known as the principal, into an irrevocable trust. For the rest of your lifetime, you will receive a set percentage of income from the principal of the trust. At the end of your lifetime, the principal of the trust passes to the charitable organization you have designated. When the trust is established, you will receive

an immediate tax deduction for your contribution. In addition, you will not pay any capital gains tax on the appreciated assets.



For further assistance with planned giving, please see **WORKSHEET #5**, *My Giving Strategy*, & **WORKSHEET #6**, *Planned Giving*, in the **Supplemental Worksheets** publication.

GIVING THROUGH ESTABLISHED INSTITUTIONS

According to the Foundation Center, a national database of foundations, the United States is home to more than 710,000 grantmaking foundations. Foundations are private or public charities primarily engaged in grantmaking to nonprofit organizations.

Community Foundations

Community foundations are public charities created by and for the residents of a specific geographic area. Community foundations offer a wide range of donor services including *Donor-Advised Funds* and *Scholarship Funds*.

Donor-Advised Funds

A Donor-Advised Fund is a fund into which you can make tax-deductible contributions and retain the ability to recommend grants from the fund to support any 501(c)(3) public charity in the United States. You receive a tax deduction the year the gift is made but may advise grants over time. All Donor-Advised

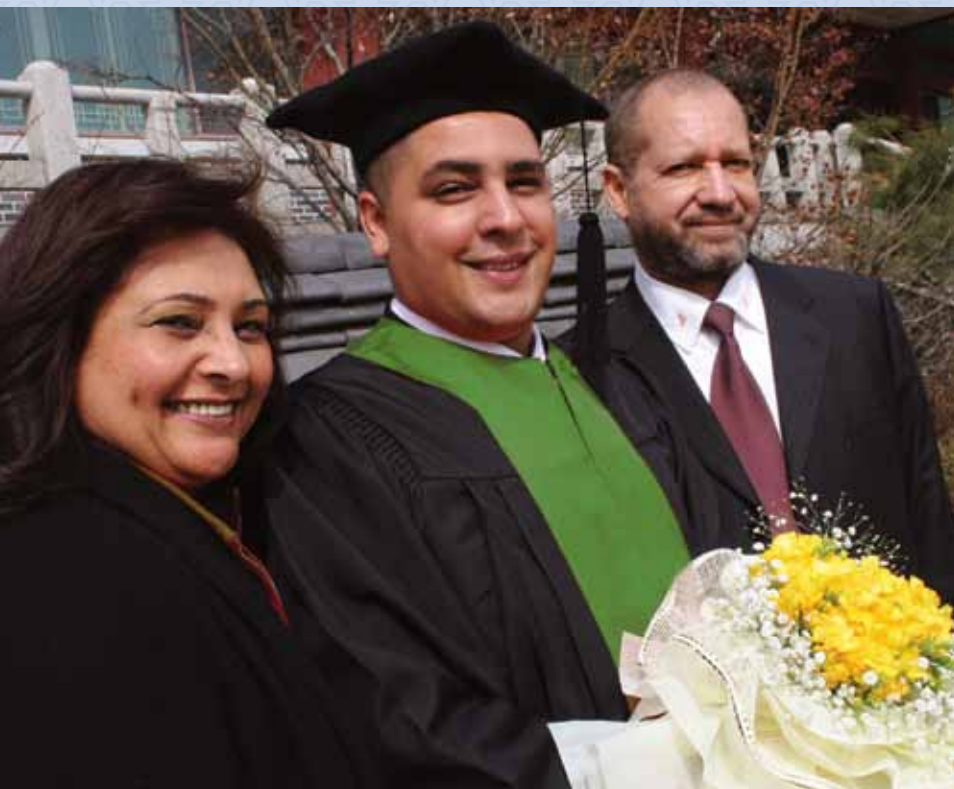
grants must be approved by the Community Foundation Board of Trustees. Donor-Advised Funds can be established by an individual, a family or a business.

Scholarship Funds

Similar to Donor-Advised Funds, an individual, family or business can establish a Scholarship Fund to be directed to specific educational institutions for scholarships. The donor may determine the criteria for the scholarship and be a part of the selection process.

Family Foundations

Family Foundations are private foundations whose funds are derived primarily from a single family. Family members often serve as officers or board members of the foundation and play a significant role in grantmaking decisions. Family Foundation board members



have 100 percent control over their grantmaking decisions, unlike Donor-Advised Funds. While assuming full control over grantmaking decisions is viewed positively by some in the Family Foundation field, it is worth noting that Family Foundations can become administratively burdensome. The board members and staff of Family Foundations are fully responsible for meeting the legal and tax requirements, as well as the grantmaking operations. Most Family Foundations are relatively small and do not employ professional staff, so family members often manage the foundation's operations.



Russell J. Ebeid

In 2008, Russell J. Ebeid established the endowed Ebeid Family Fund at the Community Foundation for Southeast Michigan. For the first 25 years of the fund, the majority of grants will be directed as scholarships through *The Russell J. Ebeid '62 ACCESS Scholarship for Arab American Students* at Kettering University, a computer science and engineering school in Flint, Michigan. By establishing this fund, Ebeid is using philanthropy to fulfill his two passions: his Lebanese heritage and education for underserved youth. "I hope that my experience will inspire other Arab Americans to stand up, be proud of their identity and give generously where they can." The first \$5,000 scholarship was awarded in 2009 and the fund will provide scholarships through 2032. After 25 years, the Ebeid Family Fund will become a permanent endowment at the Community Foundation to support charitable programs in southeast Michigan providing educational, arts and cultural opportunities for promising, low-income youth with demonstrated leadership skills.



GIVING THROUGH THE CENTER FOR ARAB AMERICAN PHILANTHROPY

The Center for Arab American Philanthropy (CAAP) is the only full service philanthropic organization in the Arab American community working with donors to fulfill their charitable giving goals within and beyond the Arab American community.



If you are looking for an opportunity to leverage your giving with other Arab Americans, make a strategic impact with your philanthropy, and join a national movement increasing the visibility of Arab American philanthropy, consider investing your charitable funds through CAAP.

CAAP can assist you in many ways, including:

- Provide information on Arab American needs and make connections to local, regional, and national organizations that meet those needs.
- Introduce you to new ways of giving.
- Conduct research on nonprofit organizations.
- Provide feedback on how your giving makes an impact.
- Pool Arab American charitable resources through the first and only national fund serving the Arab American community.

The Center for Arab American Philanthropy offers you a variety of vehicles through which you can fulfill your charitable goals:

- **Individual, Family & Business Donor-Advised Funds**
- **Giving Circles**
- **Scholarship Funds**
- **Field of Interest Funds** focused on a particular community need
- **Unrestricted Grantmaking Fund** – the general fund at the Center for Arab American Philanthropy distributes grants to Arab American organizations across the country.



“Yes, I’m involved with a lot of organizations, but to me CAAP ties everything I do together. Giving back to the community doesn’t necessarily mean giving money. It can mean giving your time, or even just learning about giving.”

- Rita Mansour



EMPOWERED IN YOUR OWN GIVING

The Guide to Arab American Giving and Supplemental Worksheets are designed as a tool and resource to help you advance your thinking about your personal philanthropy and develop a clear giving plan that is uniquely yours. Your giving plan will permit you to conduct your charitable giving in a focused and precise manner with high expectations for making an impact on the causes you care about. And with a solid plan, your level of satisfaction with your charitable efforts will increase.



You now have the freedom to choose where you want to give to make the greatest impact in your community and the world.

The Center for Arab American Philanthropy is here to serve you, providing you with the resources and information you need to fulfill your charitable goals. We hope that you will consider investing your charitable giving through CAAP by establishing a fund to benefit the organizations you support.

Join us as we inspire and strengthen philanthropy in the Arab American community. Together, we can empower the community today and leave a legacy for the future.

To learn more about establishing a fund
with CAAP, contact us at:

Center for Arab American Philanthropy

www.centeraap.org

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**CENTER FOR ARAB
AMERICAN PHILANTHROPY**

A Project of ACCESS



CENTER FOR ARAB
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GUIDE TO
ARAB AMERICAN

Giving

Supplemental Worksheets

THE GUIDE TO ARAB AMERICAN GIVING

Supplemental Worksheets

A PUBLICATION OF THE CENTER FOR ARAB AMERICAN PHILANTHROPY

Designed to supplement the *Guide to Arab American Giving*, the following worksheets are a tool for you to organize your charitable giving. We hope that the worksheets will advance your thinking about the distinctive features of your personal philanthropy. The time invested now will provide a solid foundation for more meaningful discussions with your professional advisor, and will give you a clear giving plan that you can be proud of. The result will be a practical reference tool that is uniquely yours. The plan will permit you to conduct your charitable giving in a focused, precise manner with high expectations for clear results and impact from your funding. And with a solid plan, your level of satisfaction with your charitable efforts should increase.

These worksheets are a reference tool, and will not likely answer all your questions, so we encourage you to contact a professional advisor and visit the Center for Arab American Philanthropy (CAAP) at www.centeraap.org. Our hope is that as you complete the worksheets, you will become more empowered and inspired in your giving, and confident in the knowledge that you are making an impact on issues and causes that matter the most to you. Whether you give \$25 or \$25,000, you are building a legacy of giving for future generations.

Sincerely,



Maha Freij
Deputy Executive Director/CFO
ACCESS



Hussien Y. Shousher
Advisory Board Chair
CAAP



CENTER FOR ARAB
AMERICAN PHILANTHROPY

WORKSHEET #1

Determining My Areas of Interest

Determining the issues that matter most to you is the first step in focusing your giving. To help you identify your key areas of interest, place a check mark next to the causes below that you care about. Next, circle the three that are the most important to you.

- | | |
|---|--|
| <input type="checkbox"/> Arts & Culture | <input type="checkbox"/> Human Rights |
| <input type="checkbox"/> Animal Protection / Animal Rights | <input type="checkbox"/> Immigrant & Refugee Services |
| <input type="checkbox"/> Civic Engagement / Education | <input type="checkbox"/> International Programs / Assistance |
| <input type="checkbox"/> Civil Rights / Discrimination | <input type="checkbox"/> Literacy |
| <input type="checkbox"/> Disability Rights | <input type="checkbox"/> Medicine, Science & Technology |
| <input type="checkbox"/> Disaster Relief | <input type="checkbox"/> Peace or Conflict Resolution |
| <input type="checkbox"/> Domestic Violence Prevention | <input type="checkbox"/> Philanthropy & Volunteerism |
| <input type="checkbox"/> Drug & Alcohol Abuse Prevention | <input type="checkbox"/> Religion |
| <input type="checkbox"/> Economic Development | <input type="checkbox"/> Scholarships |
| <input type="checkbox"/> Education | <input type="checkbox"/> Seniors / Elder Care |
| <input type="checkbox"/> Employment Assistance | <input type="checkbox"/> Social Services |
| <input type="checkbox"/> Environment | <input type="checkbox"/> Sports |
| <input type="checkbox"/> Foreign Affairs | <input type="checkbox"/> Women's Rights |
| <input type="checkbox"/> Gay, Lesbian, Bisexual, & Transgender Issues | <input type="checkbox"/> Youth / Child Development |
| <input type="checkbox"/> Gun Control | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Health Care | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> HIV & AIDS | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Homelessness | |

In addition to prioritizing issues, you should also consider your geographic priorities. Complete the following chart to determine the percentage of your contributions going locally, regionally, nationally, and internationally. For example, you may decide to give 40% locally, 30% nationally, and 30% internationally.

GEOGRAPHIC AREA	% OF TOTAL ANNUAL GIVING	SPECIFIC CITY/STATE/COUNTRY OF IMPORTANCE TO ME
LOCAL		
REGIONAL		
NATIONAL		
INTERNATIONAL		

With your two to three most important interest areas and geographic region(s) determined, you are now ready to begin researching the organizations that share your passions.

WORKSHEET #2

Assessing My Giving History

Determining the organizations you will support can be an overwhelming task. To help you begin, list the characteristics of the **organizations you have previously supported** to identify trends in your giving.

ORGANIZATION NAME					
ISSUES OF FOCUS					
MATCHES WITH MY TOP 3 ISSUES?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO
GEOGRAPHIC AREA PRIMARILY SERVED					
DO I KNOW HOW MY CONTRIBUTION WAS USED?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO
WOULD I GIVE TO THIS ORGANIZATION AGAIN? WHY? WHY NOT?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO

1. What values and geographic areas seem important to me based upon my prior giving?
2. How important is it for me to receive updates from an organization on how my gift was used?
3. Do the organizations I previously supported reflect my priorities identified in Worksheet 1?

WORKSHEET #3

Determining Where to Give

After you have identified your giving trends, you can begin to consider the characteristics of the **organizations you are considering**:

ORGANIZATION NAME					
LOCATION					
MISSION					
ISSUES OF FOCUS					
MATCHES WITH MY TOP 3 ISSUES?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO
MATCHES WITH ISSUES OF PREVIOUS ORGANIZATIONS SUPPORTED?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO
MATCHES MY GEOGRAPHIC AREA(S) OF INTEREST?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO
HOW DO I OBTAIN INFORMATION ABOUT THE ORGANIZATION?					
HOW WILL MY MONEY BE USED? <i>(i.e. general operating support, specific programs, capital, etc.)</i>					
DO I KNOW PEOPLE WHO ARE INVOLVED WITH OR WHO HAVE BEEN HELPED BY THE ORGANIZATION?	YES / NO	YES / NO	YES / NO	YES / NO	YES / NO

1. How much information was I able to complete about the organization(s) I listed?
Do I need to conduct more research?
2. How comfortable am I giving to an organization that focuses on values that do not match my top three priorities?
3. Do I have a preference for how my gift will be used by the organization? If I am unsure, will I still consider giving to that organization?

WORKSHEET #4

Deciding How Much & How to Give**How Much:**

Last year I gave \$_____, which represented _____ percent of my income.

1. How much would I like to be able to give in a year?
2. What is my annual income?
3. Based on my income, how much do I feel I can afford to give in a year?
4. Would I like to give the above amount to one organization? To two? To three or more?

Note how much you want to give here:

This year I want to give \$_____, which represents _____ percent of my income.

Next year I want to give \$_____, which represents _____ percent of my income.

WORKSHEET #4 (cont.)

Deciding How Much & How to Give (cont.)**How:**

This year, I will...	YES	NO	I NEED MORE INFORMATION
DONATE BY CHECK, CASH OR CREDIT CARD			
DONATE APPRECIATED STOCK (<i>stocks or bonds</i>)			
DONATE LIFE INSURANCE			
DONATE REAL ESTATE			
DONATE OTHER PERSONAL PROPERTY			
DONATE RETIREMENT ASSETS (<i>IRAs etc.</i>)			
	YES	NO	MORE INFO
GIVE MY TIME THROUGH VOLUNTEERING			
GIVE MY SKILLS AND EXPERTISE			
HOST A FUNDRAISER OR OTHER EVENT			
GIVE THROUGH THE CENTER FOR ARAB AMERICAN PHILANTHROPY			
GIVE THROUGH A COMMUNITY FOUNDATION			
GIVE THROUGH A DONOR-ADVISED FUND			
GIVE THROUGH A GIVING CIRCLE			
GIVE THROUGH AN EMPLOYEE GIVING PROGRAM			
GIVE THROUGH A FAMILY FOUNDATION			
	YES	NO	MORE INFO
ESTABLISH A CHARITABLE REMAINDER TRUST			
ESTABLISH A CHARITABLE LEAD TRUST			
ESTABLISH A CHARITABLE GIFT ANNUITY			
ESTABLISH A CHARITABLE BEQUEST			
GIVE A RETAINED LIFE ESTATE			
	YES	NO	MORE INFO
MAKE GIVING DECISIONS BY MYSELF			
MAKE GIVING DECISIONS WITH THE HELP OF A SPOUSE, PARTNER, OR FAMILY MEMBER			
MAKE GIVING DECISIONS WITH THE HELP OF FRIENDS OR COWORKERS			
MAKE GIVING DECISIONS WITH THE HELP OF THE CENTER FOR ARAB AMERICAN PHILANTHROPY			
MAKE GIVING DECISIONS WITH THE HELP OF A PROFESSIONAL ADVISOR			

WORKSHEET #6

Planned Giving

Answer yes or no to the following statements:

QUESTION	YES	NO	I NEED MORE INFORMATION
I HAVE A WILL.			
I HAVE A POWER OF ATTORNEY.			
I HAVE EXPLAINED MY END-OF-LIFE WISHES TO MY SPOUSE OR OTHER FAMILY MEMBERS.			
I HAVE DISCUSSED MY VALUES OF PHILANTHROPY WITH MY CHILDREN, SPOUSE, OTHER FAMILY MEMBERS, OR CLOSE FRIENDS.			
I HAVE A FINANCIAL ADVISOR.			
I HAVE ARRANGED FOR A LIFETIME PLANNED GIFT.			
I AM INTERESTED IN FINDING OUT MORE ABOUT PLANNED GIVING.			

If you answered "NO" to any question but the last, consider speaking with a trusted family member, a staff member at CAAP, or a professional advisor to discuss your plans for the future.

Center for Arab American Philanthropy

The Center for Arab American Philanthropy is here to serve you, providing you with the resources and information you need to fulfill your charitable goals. We hope that you will consider investing your charitable giving through CAAP by establishing a fund to benefit the organizations you support.

Our Mission: The Center for Arab American Philanthropy strengthens Arab American giving by establishing charitable legacies through education, grantmaking, and endowment building.

Our Vision: The Center for Arab American Philanthropy is the catalyst for improving lives and building vibrant communities.

Our Core Functions:

- 1. Ambassadors of Philanthropy** – We inform, educate and inspire philanthropy in the Arab American community through the Center for Arab American Philanthropy and other philanthropic organizations.
- 2. Builders and Stewards of Community Resources** – We build and manage the philanthropic resources of the Arab American donor community.
- 3. Service Providers to Donors** – We work with donors to fulfill their philanthropic goals within and beyond the Arab American community, to maximize the impact of their philanthropy, and to provide research on charitable organizations for informed giving.
- 4. Grant Makers** – Through our grantmaking, we strengthen Arab American and other nonprofit organizations and improve communities.

Join us as we inspire and strengthen philanthropy in the Arab American community. Together, we can empower the community today and leave a legacy for the future.

The Center for Arab American Philanthropy promotes, facilitates, and celebrates Arab American giving through education, training, and donor outreach and services. CAAP is the only program in the country harnessing the collective power of Arab American giving and knowledge to strengthen the voice of our community in American civil society.

Through the Center, Arab Americans are telling their own story about their contributions as Americans and are building organizations to strengthen Arab American history, culture, and leadership. Together, we are creating a permanent institution to ensure that nonprofit organizations addressing the needs of the community will have the ability to serve for years to come.



CENTER FOR ARAB
AMERICAN PHILANTHROPY



OUR VALUES

Philanthropic Excellence

Integrity and Honesty

Empowering Communities

Improving Society

*To learn more about CAAP, establishing a fund with CAAP,
and educational resources to support you, contact us at:*



**CENTER FOR ARAB
AMERICAN PHILANTHROPY**

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