



# SMART GIVING:

## DUE DILIGENCE REVIEW + SITE VISITS AIMS

### AIMS

- ✓ Develop relationship
- ✓ Understand day to day joys and sorrows
- ✓ Feel/see areas not captured in reading/online

**Level 1: Basic Compliance 501 ( c ) ( 3 )**

**Level 2: DISCERN: Performance, Challenges, Hopes & Dreams**

- Organizational history & track record
- Constituents served
- Governance & executive leadership
- Organizational vision & strategy
- Plans, initiatives, outcomes, evaluation
- Human resources: staff & volunteer
- External communications
- Relationships, partnerships & networks
- Financial health