



Excellence in Giving

the joy of generosity



2019-2020 | PERFORMANCE
REPORT

JOY



WISDOM



IMPACT

Dear Friends,

Thankful. That is the word that best captures my reflection of 2020.

Thankful to serve generous and thoughtful families who deployed \$89 million dollars to high impact projects and ministries.

Thankful for new projects and opportunities to fund God's big ideas through the Kingdom Giving Fund.

Thankful for having talented and passionate teammates who believe in the mission of Excellence in Giving and work diligently every day to serve our clients.

Thankful to God for health, strength, and wisdom needed to lead and grow Excellence in Giving for 19 years.

Much of the credit to our successful 2020 goes to Paul Penley and Jessica Bocker. It has been my joy and privilege to serve together for almost 12 and 10 years respectively. They have built Research and Client Services into world class teams that continue to exceed our clients' high expectations.

As we enter 2021, I am excited to serve remarkably generous families, execute high-value research projects, and accelerate nonprofit impact.

I am thankful that God has given us favor to add some very talented teammates and new clients in 2020. With His continued help, I believe 2021 will be a fruitful and joy-filled year.

To God be the glory,



AL MUELLER
President

“As we enter 2021, I am excited to serve remarkably generous families, execute high value research projects, and accelerate nonprofits impact.”

PRESIDENT'S
LETTER



OUR COMPANY
MISSION

Excellence in Giving provides customized solutions to help donors set and achieve their charitable giving goals.

“Being able to do this joyfully would not be possible without Excellence in Giving. We could not be successful in our grant making without you.” Paul K. - CT Client

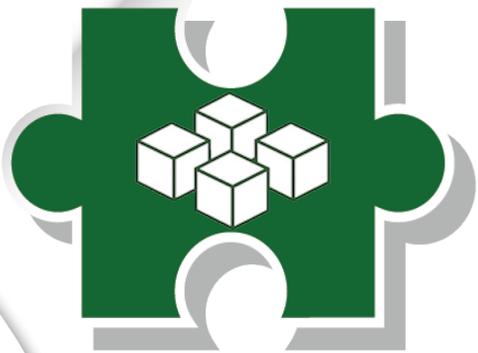
We **transform** your charitable giving experience.

BEFORE & AFTER



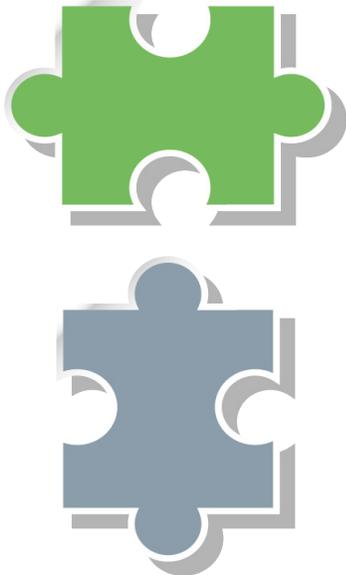
WHAT WE DO

Giving away money is easy, but giving effectively takes wisdom. Excellence in Giving helps clients experience more joy and achieve greater impact.



DISCOVER PASSIONS

When clients engage in the Discovery process, the resulting *Joy-Filled Giving Profile* provides clarity to define giving goals.

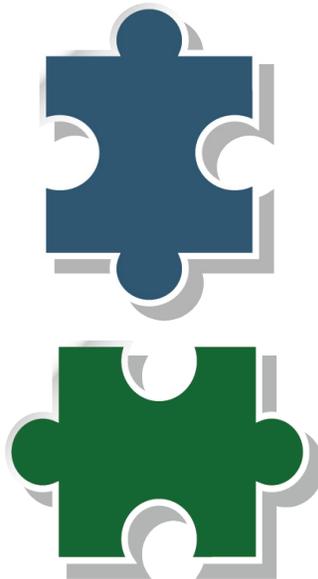


OPTIMIZE GIVING

Leverage grants to your favorite nonprofit organizations so your gift goes farther and the impact is stronger.

RESEARCH INTERESTS

Identify the best solutions to the issues you care about, and the best nonprofits working in the space.

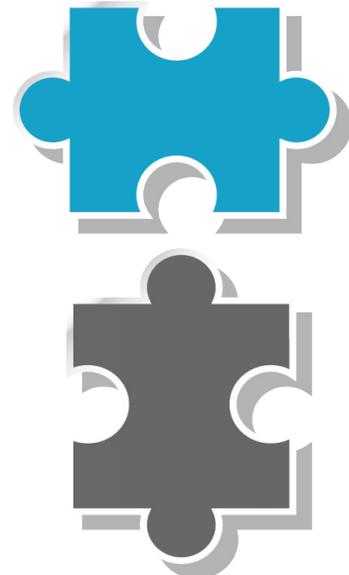


GIVE TOGETHER

Make giving a family affair. Use your philanthropy to share family values and teach the next generation about generosity.

EVALUATE

Gain confidence that the organizations you significantly fund are making the difference you hope to see.



CELEBRATE IMPACT

Visit nonprofits you have invested in - locally or around the world - on customized trips to experience and celebrate your impact.

Clients can choose one service or become full-service clients and enjoy them all.

TOTAL CLIENT GIVING
 2020 | **\$89M**

CLIENTS SERVED
60

granted by



Excellence in Giving served 60 unique clients in 2020. These individuals, families, and corporations enjoy Excellence in Giving services that enable them to become more proactive givers.

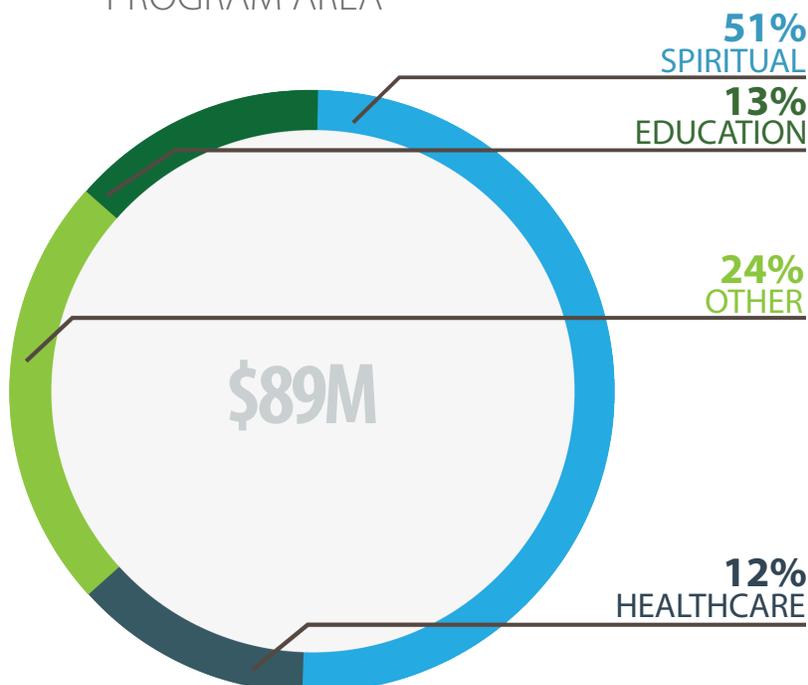


66%

MULTI-GENERATION GIVERS

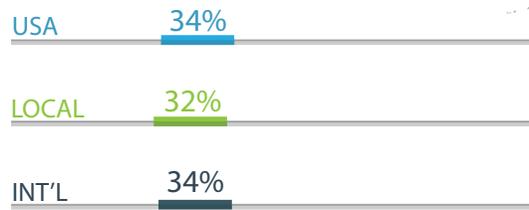
Many of our clients value family collaboration in their philanthropy. Our clients rely on our services to facilitate family meetings or allocate a portion of their giving budget to involve the next generation in philanthropy and train them to be responsible stewards.

PROGRAM AREA



Seventy-six percent of total client giving goes to 3 program areas. These categories are Spiritual, Healthcare, and Education. The next most commonly funded categories include Advocacy/Public Policy, Community Development, and Orphan Care.

GEOGRAPHIC DISTRIBUTION



In 2019-2020, Excellence in Giving clients made grants to more than 50 unique countries to support nonprofit organizations working on 5 continents.

NONPROFITS SUPPORTED

2020 | **981**



Excellence in Giving clients made grants to 981 nonprofit organizations in 2020 and 652 nonprofit groups in 2019. When Excellence in Giving evaluates nonprofits, our process helps charities leverage strengths and address weaknesses. The end result is a stronger organization poised to make a bigger impact in the world.

CLIENT SERVICE TRENDS 2019 - 2021

A woman with long brown hair, wearing a green knit beanie, a dark blue jacket over a white top, and blue jeans, is kneeling in a field of tall, dry grass. She is smiling and looking towards the camera. A golden retriever is sitting in front of her, also smiling. The background is a soft-focus field of similar grass. The entire image is framed by a large green arc at the top and bottom.

“Our Discovery process empowers clients as they identify giving goals.”

RACHEL TOMLIN
Client Services Advisor

DISCOVER PASSIONS

Discover Your Passion

The Miller siblings reached out to Excellence in Giving after inheriting substantial family wealth. Each of the three adult children had divorced and remarried, and the three families involved were still getting to know one another as individuals. While the family wanted to share passions and interests with one another and make giving decisions jointly, distance between the siblings was making it difficult to determine shared values.

Define Your Giving Goals

Excellence in Giving was able to bring some order to the unknown. We began by leading each sibling and their spouse through a separate, unique Discovery process. Our team led the two-hour interview to guide each couple in a conversation about their backgrounds, interests, and dreams of changing the world. While this process highlighted individual differences between each of the Miller couples, it also revealed several common themes. One theme in each of the interviews was that of financial responsibility and its

importance to the members of the Miller family. This was something that the siblings themselves couldn't see and that Excellence in Giving was able to bring to light. Finding this common thread brought a lot of momentum to the process. The Millers were committed to financial responsibility and giving wisely in a meaningful, personal way.

Document Your Giving Plan

After the individual Discovery processes were complete, Excellence in Giving created the Joy-Filled Giving Profile to help the siblings define giving goals, stay focused, and communicate more effectively with each other. This tool helped the Millers bond together over their shared desire to give responsibly, and the identification of that common goal united the siblings in a powerful way. The Discovery process provided the springboard this family needed to come together and focus on philanthropy as a team.



72%

Clients used our Discovery process to clarify giving goals

EVALUATE NONPROFITS

Program Evaluation

One of our foundation clients asked us to assess the long-term impact of a global ministry. That ministry also wanted to verify its lasting results through external evaluation.

Gather Data

The Langham Partnership, founded 50 years ago, supports the development and deployment of preachers, professors, and resources that accurately teach the Bible in under-resourced countries. Excellence in Giving gathered impact data from Bible Scholars trained during the last 30 years, preachers finishing up 3 years of training, publishers and Langham-sponsored authors who create key Bible study books, and 773 theological libraries serving 200,000+ students.

International Site Visits

Our Managing Director of Research, Dr. Paul Penley, circumnavigated the globe twice to discover and confirm the results: professors with a Langham scholarship teach 5,000 more students than those without a PhD, four times more preachers use sound Bible study skills after

Langham seminars, publishers almost triple the number of indigenous resources they have to sell after 10 years of partnership, and over 13,000 Seminary courses now use Langham books to educate students.

Make Recommendations

When another client asked us whom they could support to develop servant leaders around the world, we showed them our research on the Langham Scholars program with an opportunity to support 7 new Scholars. What was their response? "The results are so clear. Why don't we sponsor twice as many?" Their story proves that robust evaluation leads to confident giving. That's why we annually evaluate the performance of every major gift recipient and methodically assess the impact of ministries getting the biggest investments.

"The results are so clear. Why don't we sponsor twice as many?"

52%
American charities used external evaluators to assess program effectiveness





**“Robust evaluation leads
to confident giving.”**

PAUL PENLEY, PHD
Managing Director, Research



“Our gifts were maximized because Excellence in Giving helped us structure the funds and took away the stress of handling all the details.”

- TAYLOR FAMILY

OPTIMIZE GIVING

Creative Solutions

The Taylor family resides in Dallas, Texas and enjoys supporting a local church and pastor. For years, the Taylor family donated through their church to support a housing allowance for their Pastor, Rev. Steve Millington. During a yearly giving review, the Excellence in Giving team took time to look critically at the goals and results of the Taylor family giving. The result? A creative solution that benefited both the recipient and the donor.

Expertise in Structuring Gifts

"How long do you want to keep giving your pastor a stipend?" Al Mueller, Excellence in Giving President, asked. "Is this an indefinite gift?" Martin Taylor replied, "I'd rather stop the monthly gift and simply give the pastor a house." Al asked, "What's holding you back?" The answer to that question was that the donor simply hadn't considered that it might be possible. Additionally, the Taylors wanted the pastor to experience the pride

of ownership and the honor of providing for his own family. They wanted to structure the gift in a way that protected the pastor's dignity. This is where the Excellence in Giving team devised a creative solution.

Generous Results

Excellence in Giving was able to arrange for the client's foundation, a supporting organization, to act as a mortgage company for the home. The pastor was able to use his housing allowance to pay off the home in only 8 years. Not only did this solution provide a tax benefit to the Taylors, but it allowed the Millington family to experience the joy of owning a family home. Every year, the Millington family sends a Christmas letter to the Taylors. The Pastor's letter contains pictures of his growing family around a dinner table, his children posing on the front steps before leaving for college – all of the memories that make a house a home. This year, the letter shows the Pastor's family spending Christmas in a home they can fully call their own.



90%

**Amount of wealth available to give
in assets, not cash**

NONPROFIT EVALUATION

**Do you support effective charities?
Find out in two simple steps.**

STEP 1: Nonprofit Analytics



A comprehensive set of performance data and growth trends enables clients to make informed giving decisions.

- 175 Individual Fields of Data
- Proactive Annual Updates
- Succinct 2-Page Presentation
- 2X More Data Than Competitors

STEP 2: Bullet-Point Evaluations



Nonprofit Analytics capture data and Bullet-Point Evaluations interpret the significance. The green, yellow, and red bullet points assess the strengths and weaknesses of leadership, strategy, finances, and impact for any nonprofit. We benchmark performance against 40 standards for organizational health in our proprietary Charity Scorecard.

“I LOVE the color-coded report! As a donor, I’ve never been given so much insight before making a giving decision.”

Laurie L. - Texas Client

600+

Number of up-to-date Nonprofit Analytics in our searchable database
analytics.excellenceingiving.com





“Excellence in Giving
provides a watchful eye
and creative solutions.”

JACOB MCCLURE
Senior Research Associate



**“Our vetting process
means donors support
effective nonprofits.”**

JEDD SCHROY
Director of Evaluation

RESEARCH INTERESTS

Vet Worthy Organizations

Our donors are frequently busy professionals and don't always have time to properly evaluate the charities they support. That's where Excellence in Giving can help – by providing a team of experts to evaluate nonprofits and ensure the impact warrants greater investment. As is the case with many new clients, the Dennis family made pledges to a variety of ministries before they were introduced to Excellence in Giving. As part of the intake process, Excellence in Giving set out to evaluate the effectiveness of existing Dennis family gifts.

Rigorous Research

Excellence in Giving knew James Dennis had a passion for Law Enforcement and frequently gave to charities related to law enforcement and the military. Unfortunately, the Dennis family had been approached by a dishonest "nonprofit" group with a fantastic pitch. After some investigation and review, Excellence in Giving determined that the charity was fraudulent. Created

by a felon before his release, the charity was not even operational. Since Excellence in Giving tracks thousands of nonprofits in its network, we were able to introduce a legitimate, highly-leveraged charity, *Shield 616*, to the Dennis family.

Support Partnerships

The Dennis family has become a wonderful partner for Shield 616, a nonprofit working to protect law enforcement officers. To begin, a smaller gift was made to the local University campus that birthed a partnership between the Dennis family, university students, and campus security. Students wrote notes of encouragement to the officers and partnered with the donor successfully to ensure law enforcement officers were better prepared in case of emergency.

"Excellence in Giving saved us from a dishonest group and a poor investment. The partnership that was born in its place will save lives."



133

Bullet-Point Evaluations done in 2020 for nonprofits our clients significantly supported

GIVE TOGETHER

Family Philanthropy

Excellence in Giving was hired by the Ricci family with the goal of relaunching and expanding their foundation board. After unsuccessfully adding the Ricci children to the board when they were in high school, the Riccis now hoped to reintegrate their three adult children into family giving decisions as responsible board members. But the patriarch and matriarch of the family had different visions for their family giving strategy. An aggressive businessman with high standards, Matt Ricci, wanted to develop a giving process and secure the tools needed to give with excellence, while his easygoing and fun wife, Emily, desired the giving process to be enjoyable and pleasant for everyone.

Solutions that Work

Excellence in Giving has been the perfect solution to help the family achieve both! For example, when the family has opposing views, Excellence in Giving is able to step in and provide research and comparisons to new ministries. This

partnership has provided the Ricci family with connections to life-changing new ministries, personal connections, and spiritual growth. Because the Ricci family members all share a burden for helping those who are suffering, Excellence in Giving connected the family with a nonprofit group doing relief work in Syria.

Next-Generation Engagement

The second-generation Ricci family members have now been officially reinstated to the board and the family is experiencing joy in the giving process as Excellence in Giving provides back office support and guides the family according to their giving goals to fun, dynamic new opportunities.

“Thank you for bringing efficiencies to the process and making it enjoyable to work on something as a family.”

2/3

Clients engaged in next generation family philanthropy



A woman with short blonde hair, wearing a dark green dress and a black cardigan, stands in a field of dry, golden grass. She is smiling warmly at the camera. Her right hand rests on a wooden fence post. The background is a soft-focus landscape of trees and fields under a bright sky. The entire scene is framed by a large, light grey circular graphic element.

**“Our support brings JOY to
the family giving process.”**

JESSICA BOCKER
Managing Director, Client Services

A woman with long blonde hair, wearing a dark blue long-sleeved shirt and grey pants, is sitting on a large, textured rock. She is wearing a green backpack with the brand name 'osprey' visible on the shoulder strap. She is smiling and looking towards the camera. The background is a field of tall, golden-brown grasses under a cloudy sky. A large green arch is overlaid on the top and right sides of the image.

“When we connect donors
with effective nonprofits,
everyone wins.”

LINDSEY CAROON
Communications Manager

CELEBRATE IMPACT

Connect Donors

Dottie came from modest beginnings. Raised by her aunt in an abusive household, Dottie has a heart for women and children who need help. As a longtime client of Excellence in Giving, we were pleased to introduce Dottie to a special ministry – Hope House.

Support Worthy Nonprofits

This specific ministry had been achieving fantastic outcomes in a very modest space. Small closets were being used for counseling and the Hope House multipurpose room was truly multipurpose as it housed almost all of the nonprofit's activities. Hope House had received funds to construct a new building to serve more women and children. Unfortunately, the campaign exhausted all of its donor contacts and the leaders needed to borrow \$250,000 which would leave a minimal budget for furnishing. The nonprofit would be left with a debt burden and furniture that would not last.

Celebrate Connections

Excellence in Giving was delighted to introduce Dottie to Hope House. Dottie made a generous gift to help the ministry avoid debt and furnish the Hope House properly. She invested in well-made, durable office furniture. Her generous gift touched the women supported by the ministry. Dottie's health limited her from experiencing opening day at the new facility, but Excellence in Giving was able to provide Dottie with dynamic stories and photos to help her celebrate the impact of her gift. Dottie was especially touched to read some of the stories and thank you notes from the women and children of Hope House. "That could have been me," she said.

"It was my pleasure to be able to support such a wonderful nonprofit. Excellence in Giving made it easy. Thanks to them, my gift was low-stress and high-impact."



68%

Clients who participated in an in-person site visit or celebration in 2019

CONTACT

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Excellence in Giving
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