Charity Trail is a new online tool designed by the **Community Foundation of the Central Blue Ridge**. Its primary purpose is to connect community members to nonprofit organizations based on their personal interests. The idea for Charity Trail originated from feedback provided to the Community Foundation by local estate planning attorneys. We asked them to describe the typical conversations they have with clients concerning the possibility of incorporating charitable gifts into their estate plans. While many of their clients are willing to do so, most of them do not have specific nonprofit organizations in mind. Since that is where the conversation often ends, we designed Charity Trail to help estate planning attorneys advance those conversations to the next level.

During the development process, however, we began to recognize how the broader community could use Charity Trail beyond estate planning to learn more about the nonprofit organizations that might match their interests, expand their personal philanthropy, and volunteer their time to causes that may be important to them. Consequently, we intend to introduce it more throughout our community later in 2017.

An individual uses Charity Trail by first selecting their personal areas of interest, from geographic preferences, broad themes, specific charitable activity, and/or key words. The search engine accesses information within the profile of each nonprofit organization to identify potential matches. The user can then review the profile of the organizations that meet their search criteria.

An Invitation:
Before we introduce Charity Trail to the broader community, we are inviting all nonprofit organizations that serve all or portions of our service area, which include the independent cities of Staunton and Waynesboro, and the counties of Augusta, Nelson, and Highland, to create their profile within Charity Trail. That process begins by creating an account at www.cfcbr.org/charitytrail/. Please note that a "Save and Finish Later" function is forthcoming, but not yet available when entering your organization's profile. To help you complete your profile you may use the guide on the next page to gather all of the needed information before you begin.

<u>Data requested for your Charity Trail profile</u>

(**Bolded** items are required)

1. **Organization name**
2. **Service area within the Community Foundation's footprint** (you will check Staunton, Waynesboro, Augusta County, Nelson County, and/or Highland County)
3. Description of total service area, if broader than the Community Foundation's footprint (narrative, 100 words)
4. **Types of charitable work** (you will select one or more of the following choices:)

   - Animal welfare
   - Arts, Culture, and the Humanities
   - Children's welfare and development
   - Community enhancement
   - Education
   - Environment
   - Food, Agriculture, and Nutrition
   - Health and well-being
   - Historic preservation
   - Housing and Shelter
   - Human services
   - Legal aid, Advocacy, and Mediation
   - Mental health and Crisis intervention
   - Programs and advocacy for individuals with disabilities
   - Public safety, Disaster preparedness and Relief
   - Senior welfare
   - Veterans welfare
   - Workforce development

5. **Your organization's primary objective(s)** (you will select one or more of the following choices:)

   - Help vulnerable people in our community
   - Help people working to improve their lives
   - Enhance our community's quality of life

6. Key words or short phrases (You will enter up to 4 key words or short phrases that may help individuals using Charity Trail find your organization. For example, a food pantry may choose to use "hunger" as one of their key words.)
7. **Mailing address and phone number**
8. **Name of primary contact person at your organization and their email address**
9. Web site address
10. **Year your organization was founded**
11. How many individuals serve on your board of directors (you will select from set ranges)
12. The web site address for the page that lists your board of directors
13. How often your board meets (you will select from a set of ranges)
14. **Mission statement** (narrative, 100 word limit)
15. **Description of services offered** (narrative, 200 word limit)
16. **Description of your primary audience** (narrative, 50 word limit; e.g., "We exist to serve children with disabilities.")
17. A description of the demographics of your audience (narrative, 100 word limit; e.g., "Each year we serve 100-150 children with disabilities ages 1-5, etc…")
18. **Annual operating budget** (you will select from a set of ranges)
19. **Endowment** (you will select from a set of endowment asset ranges, which includes $0)
20. How often does your organization undertake an independent audit (you will select from several choices)
21. If you undertake a financial audit, do you make that audit available upon request (Yes or No)
22. **Your case for charitable contributions** (narrative, 200 word limit)
23. The web site address for the page that describes your naming and/or sponsorship opportunities
24. The web site address for the page that describes your fundraising priorities/options (may be the same as above)
25. Contact person and title for charitable contributions, their phone number and email address