TULSA COMMUNITY FOUNDATION

CHARITY *With* CHOICE

Tulsa Community Foundation's

Planned Giving Partnership Program Overview

In 2006, Tulsa Community Foundation created a Challenge Grant Program to encourage local charities to allocate a percentage of their fundraising efforts to building long-term, planned financial support. The program encouraged agencies to build an endowment account at TCF using planned gifts. Planned gifts are gifts to a charity from donors' assets rather than gifts from donors' income. Examples of common planned gifts are gifts to charities from a will, revocable trust, charitable trust or gift annuity.

The Challenge Grant Program established a goal of raising $5 million in planned gift pledges for the benefit of the 51 participating agencies' endowment accounts at TCF. The total combined planned gift pledges raised exceeded $17 million.

In an effort to continue the integration of Planned Giving into the overall fund development strategy of local non-profits alongside their annual, major donor and capital campaigns, TCF launched the **Planned Giving Partnership Program** in November 2008 with thirty area nonprofit organizations. In early 2010, TCF added eight additional agencies to the Partnership program. TCF will add 8-15 new agencies in early 2011.

This program is designed to encourage agencies to continue building endowment gifts through planned giving. To accomplish this goal, TCF has hired The Advancement Group (http://www.tagpg.org/) to provide a wide array of services to the Partnership's agencies and donors.

Realizing that planned giving programs are outside the financial reach of most non-profits, TCF underwrites a significant portion of the costs associated with an agency having a planned giving program. However, based on the size of the operation budget of an agency, each organization is responsible for contributing a small fee in exchange for having available a full-time, outsourced planned giving staff and resources that each agency can call *their own*. The 2010 partnership fee is either $3,090 or $4,120 depending on whether an agency's operating budget is less than or greater than $1 million.

PLANNED GIVING PARTNERSHIP PROGRAM OVERVIEW OF SERVICES:

"Administrative Help Desk": The Administrative Help Desk is designed to answer charitable gift and administration questions (i.e. providing tax deduction values for gift annuities and charitable trusts, assisting the charity with respect to matured gifts, real estate transfers, beneficiary changes, etc.), work with the representatives of an estate/trust and other allied professional advisors (as needed), and assist the Participating Agencies and/or TCF in establishing or implementing the program (including necessary meetings, telephone calls, review of materials, etc.).

"Help Desk" to Donors: The Donor Help Desk is designed to answer donors' planned giving questions and prepare gift proposals (Charitable Gift Annuities, Charitable Lead Trusts, Bequests, etc.) for the donors' benefit.

Donor Follow-up Appointments: The Advancement Group conducts individual, confidential appointments with prospective donors for each Participating Agency. These appointments are perhaps the most important component of the program. During these appointments, donors are able to discuss estate plans with a third party, The Advancement Group, to create a plan and develop documents that will cause the planned gift(s) to occur.

Agency-Customized Strategic Marketing Plan: Each Participating Agency develops and implements a customized Strategic Marketing Plan for the agency's planned giving program. To accomplish this objective, The Advancement Group conducts monthly meetings with each Participating Agency. Through these monthly meetings, The Advancement Group assists each agency's representatives to identify, monitor and manage the agency's planned giving program activities as stated in the agency's customized strategic marketing plan.

Planned Giving Partnership Program Gantt Chart: A master program Gantt chart and a customized Participating Agency Gantt chart is developed to execute the planned giving partnership program activities.

One (1) Annual Customized Planned Giving Meeting for Each Agency's Board: The Advancement Group conducts one (1) planned giving meeting each program year with each Participating Agency's Board. The general format will provide for a case study or two that will help the board better understand how planned giving works and what planned giving ideas board members may use personally or communicate to the agency's prospective donors.

Planned Giving Presentations: Two to three (2-3) small group planned giving presentations are conducted each program year where Participating Agencies' donors can attend to receive educational information on planned giving tools and techniques. Most seminars are limited to 25-30 household units. Topics are designed to address a donor's financial and family goals and objectives ranging from Charitable Gift Annuities, Business Owners and Professionals, Estate Planning, Planning for the Single Parent or Special Needs Trust, Women and Philanthropy, Charitable Tax Reduction Strategies, Year-end Gift Giving & Receiving, etc.

Quarterly Continuing Education: Quarterly Planned Giving Continuing Education classes are conducted for all Participating Agencies in order to equip development staff to identify planned giving opportunities, manage and maintain a planned giving program and increase the agencies' working knowledge of planned giving tools & techniques.

Monthly Planned Giving Mentor E-mail: Participating Agencies receive a monthly email that highlights and discusses specific planned giving tools, techniques or other pertinent planned giving topics (i.e. marketing, etc.). The email highlights upcoming seminar topics and equips the agency to effectively communicate fundamental planned giving tools and techniques.

Prepare Planned Gift Illustrations: The Advancement Group prepares unlimited gift proposals (Charitable Gift Annuities, Charitable Lead Trusts, Bequests, etc.) for Participating Agencies' donors.

Prepare Articles for Newsletters: Participating Agencies are given ten (10) planned giving articles per program year that can be customized, inserted into the agency's newsletters, direct mail pieces, etc. and used to highlight upcoming seminar topics.

Planned Giving Follow-up: The Advancement Group assists Participating Agencies in maintaining annual contact with Legacy donors by assisting in the creation of legacy societies.

Monthly Reports: Each Participating Agency receives a monthly report that collects and organizes various inputs.

Agencies currently participating in the Planned Giving Partnership are:

- Arts & Humanities Council of Tulsa
- Associated Centers for Therapy, Inc.
- Big Brothers Big Sisters of Oklahoma
- Camp Fire USA
- The Center for Individuals with Physical Challenges
- Child Abuse Network
- Clarehouse, Inc.
- Community Food Bank of Eastern Oklahoma
- DaySpring Villa Women and Children's Shelter, Inc.
- Domestic Violence Intervention Services, Inc.
- Girl Scouts of Eastern Oklahoma
- Goodwill
- The Guild of Tulsa Opera
- Happy Hands Education Center, Inc.
- Home of Hope
- John 3:16 Mission
- Jr. Achievement of Eastern Oklahoma, Inc.
- LIFE Senior Services
- The Little Lighthouse, Inc
- Mental Health Association in Tulsa
- The Metro Christian Academy Foundation
- The Parent Child Center of Tulsa
- Riverfield Country Day School
- Street School, Inc.
- Teen Challenge of Oklahoma (Brush Creek Youth Ranch)
- Therapetics Service Dogs of Oklahoma Inc.
- Tulsa Area United Way
- Tulsa Boys' Home
- Tulsa Dream Center
- Tulsa Historical Society
- Tulsa Opera, Inc
- Up With Trees
- YMCA of Greater Tulsa
- Youth at Heart
- Youth Services of Tulsa

For more information about the Planned Giving Partnership or TCF's other planned giving services, please contact John Wolfkill at (918) 591-2400 or jwolfkill@tulsacf.org.