



Planned Giving Partnership Program Overview

In 2006, Tulsa Community Foundation (TCF) created a Challenge Grant to encourage local charities to allocate a percentage of their fundraising efforts to build 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 established a goal of raising \$5 million in planned gift pledges for the benefit of the fifty-one (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 in the overall fund development strategy of local nonprofits alongside their annual, major gift and capital campaigns, TCF launched the **Planned Giving Partnership** program in November 2008 with thirty (30) area nonprofit organizations. Today, sixty-one (61) nonprofit agencies participate and the program has produced over \$100 million in planned gifts to benefit the community.

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

Realizing that planned giving programs are outside the financial reach of most nonprofits, TCF underwrites a significant portion of the costs associated with an agency having a planned giving program. However, based on the size of the agency's operating budget, each agency is responsible for contributing a small fee in exchange for having access to a full-time, outsourced planned giving staff (The Advancement Group) and resources that each agency can call their own.

Tiered program fees are based on the following table:

<u>Agency Operating Revenues (990)</u>	<u>Annual Fee</u>
\$0 - \$9,999	\$750
\$10,000 - \$399,999	\$1,000
\$400,000 - \$699,999	\$2,250
\$700,000 - \$999,999	\$3,500
\$1,000,000+	\$4,500

PLANNED GIVING PARTNERSHIP 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' benefits.

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 Presentation: 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 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.

For more information about the Planned Giving Partnership or TCF's other planned giving services, please contact Mike Dodson at (918) 494-8823 or mdodson@tulsacf.org.

Participating Planned Giving Partnership Agencies:

- A New Leaf, Inc.
- American Cancer Society
- Arts & Humanities Council of Tulsa
- Arts Alliance Tulsa
- Big Brothers Big Sisters of Oklahoma
- Bishop Kelley High School
- Broken Arrow Seniors
- Camp Fire USA Green Country Council
- Cascia Hall Preparatory School
- Catholic Charities Diocese of Tulsa
- Circle Cinema Foundation Inc.
- Community Food Bank of Eastern Oklahoma
- Counseling and Recovery Services of Oklahoma
- Disaster Resilience Network
- Eagle Point Christian Academy
- Family Safety Center
- First Tee of Tulsa
- Foundation for OSU Medical Center
- Gatesway Foundation
- Girl Scouts of Eastern Oklahoma
- Goodwill Industries of Tulsa, Inc.
- Happy Hands Education Center, Inc.
- Holland Hall School
- Home of Hope, Inc.
- Hospitality House of Tulsa, Inc.
- Human Skills and Resources - Tulsa
- Indian Health Care Resource Center
- John 3:16 Mission, Inc.
- John Hope Franklin Center for Reconciliation, Inc.
- Junior League of Tulsa, Inc.
- Kendall Whittier, Inc.
- Leadership Tulsa
- LIFE Senior Services
- Lindsey House
- Mental Health Association Oklahoma
- Metro Christian Academy Foundation
- New Life Ranch
- Oklahoma Aquarium Foundation
- Oklahoma Project Woman Inc.
- Parkside Psychiatric Hospital and Clinic
- Riverfield Country Day School
- Rogers County Volunteers for Youth
- San Miguel School of Tulsa
- Starlight Concerts, Inc.
- Street School, Inc.
- The Little Light House
- The Tulsa Dream Center, Inc.
- Tristesse Healing Hearts Grief Center
- TSHA, Inc.
- Tulsa Botanic Garden
- Tulsa Boys' Home
- Tulsa CARES
- Tulsa Engineering Foundation, Inc.
- Tulsa Habitat for Humanity
- Tulsa Town Hall Endowment Inc.
- Tulsa Zoo Management Inc.
- Up With Trees
- Youth at Heart, Inc.
- Youth Services of Tulsa, Inc.