Tulsa Community Foundation
Legacy Partnership Program Services

Administration

- Regular Planned Giving Strategy Meetings with Executive Directors, Development Directors, and Marketing Directors
- Participating Agency "Administrative Help Desk"
- Integration of endowment building fundraising strategies into an existing capital campaign
- Advisement on organization specific major gift and annual fund programs from a legacy giving perspective
- Donor Fund (Advised and Designated) administration to close the gift for organization gift reporting
- Legacy Partnership on-site strategy meetings
- **Donor Activity Reports**: (inquiries through gift completion for participating organizations)
- **Department Activity Reports**: (activity between each participating organization and their legacy department)
- **Legacy Website Analytics:** Website traffic report for planned giving websites
- **Donor Gift Report**: Participating organization Gift Report of gift commitments

Marketing

- Marketing Website – customized options for
    - Printed or electronic ads
    - IRA Rollover postcard (with DISCOVERx screening data)
    - IRA Rollover materials
    - Gifts of Appreciated Assets postcard (with DISCOVERx screening data)
    - A full year's worth of planned giving social posts
    - A full year's worth of short planned giving ps lines
    - All pages include years' worth of additional, customizable marketing materials
- Planned giving website
    - Limited customization of rolling banner, to include two agency specific images
    - Three (3) pages of planned giving specific tools and strategies for making gifts to charity
    - Each page contains topics related to planning options and each topic contains an educational video explaining the gift options
    - Interactive forms to request additional assistance with gifts of stock and gifts through an IRA or QCD
    - Instant access to each organization's legacy office for an immediate phone call to discuss planning questions or concerns
    - Customized contact page for donors and allied professionals

Donor Screening (DISCOVERx):

- Provided at an additional cost to process an organization's donor database to find the following:
    - Donor's philanthropic gift capacity
    - Donor's demographic information
    - Donor's other philanthropic gifts to other charities
    - The gift capacity of the database, based on all of the donor's gift capacity
    - The gift capacity of the database compared to the most recent gifts given and the difference (delta) between the two
    - Segmentation of donors into Planned Gift, Major Gift and Annual Fund prospects
    - The planned giving segmentation includes 6 different topics for customized marketing
- The results of the donor screening are used to create customized marketing materials and topics to be sent throughout the year. These materials are not available to those who have not been through the donor screening process

Donor Appointments:

- Donor Goals & Objectives
- Gather information (family, financial, philanthropic)
- Analyze the data and design the gift plan(s)
- Implement the plan
- Donor Follow-up & Legacy Society
- Donor workshop follow up (for RSVP but not attended)
- Donor appointment follow up – sending letters to each organization so that the can reach out to the households that met with their legacy office

Allied Professional:

- Draft Phase
- Execution Phase
- Gift Verification

Board and Committee Meetings:

- Board specific meetings on the program services or education topic
- Yearly orientation meetings for board members to hear more about the program services
- Board member orientation meetings on strategies related to the 2implementation and management of the organization's legacy program

Public Donor Workshops:

- Public donor workshops for the participating organizations
- Organization specific workshops to engage with donors on specific planning topics
- Collaborative agency workshops (special needs, law, finance, etc…)

Continuing Education Meetings:

- Presentations on topics related to planned giving, major gifts, annual fund, data, and marketing
- New agency onboarding/recruitment meetings throughout the year covering how to join the program and an overview of the program services
- Annual All Agency meeting to discuss program performance and future program enhancements
- Planned giving training seminar (4P's workshop)

Other

- Employee staff meetings to discuss the program and benefits to employees
- Employee document subsidy program – education and management for the organization
- Review of each household's legacy gift to update or verify gift plans
- Unlimited gift plan illustrations for plans that utilize gift annuities, lead trusts, ect…

Legacy Society

- Create, implement and manage participating organization's legacy societies
- Create strategies to promote and marketing the legacy society to increase donor participation and engagement with new or existing societies
- Provide communication recommendations, society benefits and other marketing items for each organization to have a customized legacy society
- Attend organization specific legacy events to talk about the importance of endowment and encourage continued endowment support