

## Silicon Valley Planned Giving Council's Incubator Program - FY 2011-13

**Purpose:** to provide resources and hands-on mentoring for local nonprofit organizations developing and implementing endowment programs and planned giving activities for their long-term financial stability.

**Problem:** While many nonprofit organizations believe a growing endowment fund will help to sustain them, and that a planned giving program is important, most are in need of help to get a program started.

**Solution:** The *Silicon Valley Planned Giving Council* (SVPGC) developed a model program to encourage, instruct, nurture, and support select local nonprofit organizations on their path to establishing and operating successful and appropriate planned giving and endowment-building programs. This is a mentoring program **for the organization**. Since its inception in 2000, 35+ nonprofit organizations and 50+ volunteer mentors have participated, and millions of dollars have been secured.

**Selection Process:** Nonprofit organizations must submit a **written request to the SVPGC by Thursday June 30, 2011**, and will be **notified by July 15 regarding acceptance**. Follow-up activities and services will take place throughout the two-year period, ending officially by June 30, 2013.

Date/Time (all meetings at 1922 The Alameda, San Jose, CA – just off 880.)	Activity	Who Comes
Thursday June 30, 2011, 5 p.m. – electronically AND physically (see info at end of application)	Applications Due! ( <b>Note submittal details!!!</b> )	<i>NA</i>
Friday July 15, 2011	Notify Groups selected	<i>NA</i>
Monday August 8, 2011, 9-10:30 a.m., #105	Mentee meeting	1+ nonprofit rep.
Monday August 8, 2011, 12:00 – 1:30 p.m., #105	Mentor lunch meeting	Mentors
Thursday September 22, 2011, 8:00 a.m. – 1:15 p.m., #107	Kickoff – Planning Training Meeting	<b>Required!!! ALL TEAMS</b>
December 1, 2011	Written Reports Due	Email report
Thursday February 9, 2012, 12:00 – 1:30 p.m., #107	Mid-point check-in meeting	<b>ALL TEAMS</b>
Thursday June 14, 2012, 12:00 – 1:30 p.m., #107	Final Check-in Meeting, Final Written Reports	<b>ALL TEAMS</b> Email report
June 30, 2012, 5 p.m.	Applications for 2012-14	

### Nonprofit organizations will:

1. Submit a completed **application, including approval** from its governing body to engage in the program, with **at least two volunteers, one of whom must be a Board member**, participating.
2. **Send a team of 3-6 people**, including staff and board/volunteer leaders, to attend a half-day training/planning session in September, noted above. Key people **must** be present.
3. **Spend at least four hours per month** in such activities as discussing or planning with the internal team or implementing the program.
4. **Make this program a priority** in organizational and leadership activities for the two-year period.
5. **Develop reasonable goals for the year** in conjunction with mentors.
6. **Pay an annual fee to cover expenses** (upon acceptance - \$1,000, including all materials, meals).
7. **Participate in an evaluation** process to guide future program development.
8. Have at least one person with a current membership in the *Silicon Valley Planned Giving Council*.

### *Silicon Valley Planned Giving Council* will:

1. Provide training sessions and group meetings per calendar.
2. Guide nonprofit participants in developing reasonable goals for the year.
3. Assign a team of Council members to each nonprofit organization to serve as mentors and assist in reaching the goals.

4. Mentors will attend training sessions and provide at least two hours per month consultation in the first year, and one hour per month in the second year.
5. Maintain regular communication between Council and participants, and share results.

**Nonprofit Application for Silicon Valley Planned Giving Council  
Incubator Program - 2011-2013**

*Must be received by Thursday June 30, 2011*

**Organization** (name and address):

**Tax Id Number:**

**Website:**

**Top Staff Executive** (contact info including phone and email):

**Top Development Staff** (contact info including phone and email):

**Team Members and roles** (those who will attend training sessions):

**Fiscal Year end** (mm/dd):

<i>Category</i>	<i>Est. Actual \$ for FY 2010-2011</i>	<i>% for FY 10-11</i>	<i>Estimate \$ for FY 2011-2012</i>	<i>Est. % for FY 11-12</i>
Earned Income (w/o endowment)				
Government				
Corporate/business				
Foundation				
Individuals/family foundations				
Organizations				
United Way				
Endowment Income				
Other (specify)				
<b>Total</b>				

<b><i>Upon application</i></b>	<b>Project Status (Y or N or numbers as requested)</b>
	1. #of individuals making financial contributions in most recent fiscal year
	2. # of regular active volunteers.
	3. # of individual donors giving \$5,000 or more at one time in the past 10 years.
	4. # of individual donors who have given 10 or more times in the past 2 years.
	5. # of individual donors who have given every year for the past 5 years
	6. We have a donor recognition society/group (other than an endowment or heritage society). (Y or N) State the number of members _____.
	7. We have an endowment fund. (Y or N)
	8. Value of endowment.
	9. Endowment goal (put figure in box).
	10. We have a society honoring donors to the endowment fund (endowment fund or heritage society). (Y or N)
	11. Number of people in endowment fund society or heritage society.
	12. We publish the names of donors to the endowment fund. (Y or N)
	13. We annually print at least one major newsletter article about the endowment fund. (Y or N)
	14. We have gift policies that were revised _____(month/year)
	15. We have an endowment committee or other group focusing on this effort.
	16. Our Board had a presentation about Leave a Legacy or planned giving in the past year.
	17. # of bequests in past five years/total \$.
	18. # of charitable trust arrangements/total value of \$.

**Notes:**

We would like to be considered for the Incubator Program because:

As a result of participating, we hope:

Submit this application form both electronically and physically by 5 p.m. Thursday June 30, 2011.

1. Electronically (this form only) to [c@lukoff.org](mailto:c@lukoff.org)  
**AND**
2. Physically send five sets of the following items, with copies of the application on the front, to Colleen Lukoff, c/o Brian Shetler, Berliner Cohen, Ten Almaden Blvd., 11<sup>th</sup> Floor, San Jose, CA 95113:
  - a. Board of Directors list with Affiliations
  - b. Board motion approving participation (a copy of minutes or signed certification of top staff person)
  - c. Contact information for all parties who will attend one-day training session including name, address, phone, fax, and email
  - d. Agency brochure
  - e. Most recent newsletter

Questions? Contact Colleen at 760-591-9455 or [c@lukoff.org](mailto:c@lukoff.org).