

Silicon Valley Planned Giving Council's Incubator Program - FY 2009-11

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**. Over the nine years of the program, 30+ nonprofit organizations and volunteer mentors have participated.

Selection Process: Nonprofit organizations must submit a **written request to the SVPGC by Wednesday July 8, 2009**, and will be **notified by the 22nd regarding acceptance**. Follow-up activities and services will take place throughout the two-year period, ending officially by June 30, 2011.

Date/Time (all meetings in San Jose)	Activity	Who Comes
Wednesday July 8, 2009, 5 p.m. – electronically AND physically (see info at end of application)	Applications Due! (<i>Note submittal details!!!</i>)	NA
Wednesday July 22, 2009	Groups selected	NA
Monday August 17, 2009, 12:00 – 1:30 p.m.	Mentee lunch	1+ nonprofit rep.
Tuesday August 18, 2009, 12:00 – 1:30 p.m.	Mentor lunch	Mentors
Thursday September 17, 2009, 7:30 a.m. – 1:15 p.m.	Kickoff – Planning Training Session	Required!!! ALL TEAMS
December 1, 2009	Written Reports Due	Email report
Wednesday February 10, 2010, 12:00 – 1:30 p.m.	Mid-point check-in meeting	ALL TEAMS
Tuesday June 8, 2010, 12:00 – 1:30 p.m.	Final Check-in Meeting, Final Written Reports	ALL TEAMS Email report
June 30, 2010, 5 p.m.	Applications for 2010-12	

Nonprofit organizations will:

1. Submit a completed **application, including approval** from the 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 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 over first year, and one hour per month in the second year.
5. Maintain regular communication between Council and participants, and share results.