

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.

**Nonprofit Application for Silicon Valley Planned Giving Council
Incubator Project – Program Year 2009-2010**

Must be received by Wednesday July 8, 2009

Organization (name and address):

Tax Id Number:

Website:

Top Staff Executive (contact info including email):

Top Development Staff (contact info including email):

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

Annual operating budget for most recent Fiscal Year ending (mm/dd/yyyy):

<i>Category</i>	<i>Actual \$ for last FY</i>	<i>% for last FY</i>	<i>Estimate \$ for Current FY</i>	<i>Est. % for Current FY</i>
Earned Income (w/o endowment)				
Government				
Corporate/business				
Foundation				
Individuals/family foundations				
Organizations				
United Way				
Endowment Income				
Other (specify)				
Total				

<i>Upon application</i>	Project Status (Y or N or numbers as requested)
	#of individuals making financial contributions in most recent fiscal year
	# of regular active volunteers.
	# of individual donors giving \$5,000 or more at one time in the past 10 years.
	# of individual donors who have given 10 or more times in the past 2 years.
	# of individual donors who have given every year for the past 5 years
	We have a donor recognition society/group (other than an endowment or heritage society). (Y or N) State the number of members _____.
	We have an endowment fund. (Y or N)
	Value of endowment.
	Endowment goal (put figure in box).
	We have a society honoring donors to the endowment fund (endowment fund or heritage society). (Y or N)
	Number of people in endowment fund society or heritage society.
	We publish the names of donors to the endowment fund. (Y or N)
	We annually print at least one major newsletter article about the endowment fund. (Y or N)
	We have gift policies that were revised _____(month/year)
	We have an endowment committee or other group focusing on this effort.
	Our Board had a presentation about Leave a Legacy in the period indicated.
	# of bequests in past five years/total \$.
	# 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. Wednesday July 8, 2009:

1. Electronically (this form only) to 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 Peggy Martin, The Family Wealth Consulting Group, 25 Metro Dr., Suite 600, San Jose, CA 95110
 - 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.