Philanthropy International

Partner Charity Program

Building Financial Security for Your Charity
with the Philanthropy International Partner Charity Program

The Synopsis

Our Mission

Build stronger communities and secure lasting family legacies. We accomplish this mission by supporting three different groups of people.

- Serving charities and foundations by enabling them to acquire planned gifts that provide these charities a more secure long-term funding source.
- Training professional advisors in safe, proven, and innovative approaches to tax-exempt planning, and uniting them with charities who need their support.
- Helping individuals and families increase and develop more cash flow, provide a better inheritance to their children while taking dollars that would have been tax and redirecting them to their favorite charities or foundations.

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Introduction

Today there are more than 1.4 million charities in the United States yet less than 2% have a formal planned giving program or a dedicated planned giving officer. Few are equipped to handle the more complicated gifts often discussed in planned giving.

Philanthropy International is a 501(c)(3) organization that provides an outsourced planned giving solution. We believe a volunteer planned giving officer with numerous support services is a practical alternative to an internal staff model. Philanthropy International works to provide each Partner Charity with a Charitable Planning Specialist (CPS) in the Partner Charity's community to encourage and assist in the development of planned gifts.

Additionally, Philanthropy International provides professionally produced DVDs and marketing materials that deliver a compelling, consistent, and conservative message to donors and the community at large.

Together, Philanthropy International and the Partner Charity will create a business model for delivery of planned giving services, and a workable strategy reflecting the charity's needs and mission.

Philanthropy International educates charity friends and donors on how taking the time to plan a gift will help them build a lasting legacy of significance. They will discover that charity and tax are two side of the same coin and that by taking the time to plan a gift, donors are able to redirect social capital to their favorite charity. Many times, this process will provide an increase in net worth or spendable income as well as provide a significant inheritance to those they love.

Program Highlights

Two Programs to Choose From:

Each charity will have the opportunity to determine which program adequately addresses their planned giving needs and fits within their budget. The ***Legacy Partner*** program provides the greatest amount of personal attention from the Philanthropy International office and the Volunteer Planned Giving Officer (CPS). This program includes development staff training, a proactive marketing strategy, as well as a significant supply of consumer DVDs with customized, professionally printed DVD cover brochures. The online ***Heritage Partner*** program allows you to start with a lower cost, utilizing website delivery options. This can be a very effective method to introduce planned giving concepts to existing donors and friends.

Both the ***Legacy*** and the ***Heritage Partner*** programs include the following highlights:

- Dedicated Volunteer Planned Giving Officer (CPS)
- Technical assistance and illustration support
- Coordination for gift completion
- Customized website
- Graphics and media team (for an additional fee)

Legacy Partner Program Overview - $18,000* per year

(Either a one-year payment up front of $18,000 or 12 equal payments of $1,500 for the first year)

- Personalized board presentation
- Initial strategy session
- Planned giving audit and report analysis
- 1,000 professionally-mastered consumer DVDs (single title)
- Customized DVD cover brochures (single title)
- Proactive planned giving marketing strategy
- CPS appointments with key donors
- Marketing orientation packet
- Training for development department staff
- All ***Heritage Partner Program*** components listed below

Heritage Partner Program Highlights - $350 per month

($1,000 set-up fee)

- Self-administered planned giving audit
- ***Heritage*** Marketing Strategy
- Volunteer planned giving officer to respond to inquiries
- Communications kit for message integration
- Quarterly activity report

**There are different fee structures for a charity with multiple regions or a national scope. Please see FAQ #11 for more information, or contact the Philanthropy International office for pricing details.*

Our Approach

Philanthropy International provides our Partner Charities customized marketing materials designed to quickly, economically, and seamlessly incorporate a planned giving presence. Donors and friends are introduced to planned giving options through donor-friendly video clips that illustrate the rewards of planning their giving. The content on these marketing materials is designed to promote dialogue and questions with potential donors, leading them to take the next step in the planning process. We strongly believe that developing relationships is the key to planned giving. We have built our materials, and structured the web pages to encourage donor/organization contact.

We combine two approaches to encourage potential donors to contact your organization:

- For visual appeal and relational communication we use professionally mastered DVDs and simple animations to illustrate each concept. Each concept provides a generic illustration that communicates the emotional rewards of donating, as well as potential economic benefits.
- On an intellectual level, we provide the information necessary to answer initial questions. We help your potential donor realize that planning a gift to your organization makes sense. Then, the planned giving relationship begins as it should; with personal contact.

The content is personalized to your organization to use in cultivating your relationship with your donors and friends. An additional opportunity exists to populate the web site with customized videos and pictures, for an additional fee.

The Risk

Charitable organizations have discovered that more than 50% of donors don't tell them of their future bequest. How can you protect the most important relationships if you are not aware of their gift intentions?

This out-sourced planned giving program allows you to inform and serve those people who care about your mission and might otherwise seek assistance elsewhere.

Who is This Program For?

Are you a charity that desires to do more? To help more children? To feed more hungry? To provide strength and support in times of crisis?

Charities exist to impact their community for good, to meet a need, to help a friend. However, many charities are unable to grow or expand their good work because of limited funds. And even more charities are facing crises because their committed donors and supporters are aging.

A partnership with Philanthropy International provides a chance to implement a cost-effective entry into the long-term solution of planned giving.

Take time to mark as many of the below categories that seem to fit your charity. Discover if this program may be the right step for you.

- ❐ Charities that are looking to focus on their mission and purpose through an effective planned giving program.
- ❐ Charities that desire to teach their donors how to redirect money that would have gone to tax to their programs.
- ❐ Charities with a planned giving team but need a new, focused, compelling and consistent message.
- ❐ Charities looking for a unique approach to planned giving.
- ❐ Charities that may not have sufficient funds to develop an internal planned giving department.
- ❐ Charities that may not have the manpower or expertise to implement planned giving strategies.
- ❐ Charities willing to recognize that planned giving takes time and thus philosophically commit to a long-term planned giving perspective of at least three years.
- ❐ Charities that have donors and friends that are committed to that organization who desire to fulfill the mission and impact their community.
- ❐ Charities with a CEO/leader with a commitment and willingness to take the lead on this opportunity to provide financial security.
- ❐ Charities that have a history of structural stability with an emphasis on long-term financial dependability.

What's Next? Steps to Get Started

Once a charity has been introduced to the Partner Charity Program, either through contact with a Charitable Planning Specialist or through the Philanthropy International office, the following steps typically take place to confirm a ***Legacy Partner*** relationship.

1. A conference call/meeting is scheduled to identify roles and functions of the charity staff, CPS, and Philanthropy International staff. All contract questions will be addressed.
2. A contract is created by PI and submitted to the charity. A copy can be provided to the potential CPS with the charity's permission.
3. The signed contract is returned to the Philanthropy International office along with the initial fee.
4. The charity creates information for their customized website and marketing materials, as well as determine the single title for their initial DVD order, as well as ordering any additional titles.
5. Partner Charity to complete Planned Giving Audit paperwork.
6. Philanthropy International will take the ***Legacy Partner's*** Planned Giving Audit paperwork and create an analysis with observations and recommendations.
7. A meeting will take place with each ***Legacy Partner*** to create a customized marketing strategy, based on the findings from the Planned Giving Audit Report.
8. A Charitable Planning Specialist will be assigned to the charity.
9. Philanthropy International will provide assistance to the CPS to implement the marketing strategy for each ***Legacy Partner***.
10. Each ***Legacy Partner*** will have bi-monthly phone appointments with the CPS, Philanthropy International, and the charity primary contact for the first six months.

Heritage Partner Distinctions

Please note because of the unique nature of the contract, the ***Heritage Partner*** charity manages their own strategy and implementation, with direction from Philanthropy International. A few distinct points are listed below in reference to the ***Heritage Partner*** program.

- The ***Heritage Partner*** charities receive a customized web site to use as their primary communication tool. However, each ***Heritage Partner*** can order generic or customized DVDs and brochures.
- The Planned Giving Audit is a self-administered tool for each ***Heritage Partner***.
- A standard Marketing Strategy will be submitted to each ***Heritage Partner*** charity for implementation.
- In the ***Heritage Partner*** program, the charity is responsible to implement the marketing strategy, utilizing the CPS when needed.

Responsibility of Each Entity

Partner Charity

- Garner Board support
- Schedule Board presentation
- Participate in regular communication with both the CPS and Philanthropy International.
- Identify top 100 donors and/or friends who have a strong commitment to the organization.
- Bring together small gatherings of CPS with top donors and/or friends.
- Complete Planned Giving Audit paperwork.
- Assist in implementing planned giving marketing strategy.

Volunteer Planned Giving Officer (CPS)

- Implement customized marketing strategy while keeping open communication with both the Partner Charity and Philanthropy International for the ***Legacy Partner*** program*.
- Respond to all leads generated by the marketing strategy and/or website.
- Be available to meet with top 100 donors and/or friends of the Partner Charity.
- Provide reporting to Philanthropy International office on quarterly activities.
- Speak at various Partner Charity events.

Philanthropy International

- Provide Planned Giving Audit report, results analysis/recommendations and customized Marketing Strategy for the ***Legacy Partner****.
- Provide quarterly reports for all online activity as well as annual reports for all other communication and development.
- Assign a Charitable Planning Specialist to the Partner Charity to act as their Volunteer Planned Giving Officer.
- Provide marketing materials to communicate the planned giving message to the Partner Charity's donors and friends.
- Provide oversight of advisor activity as well as provide resource support.
- Assist the Charitable Planning Specialist in case design when needed.
- Identify, recruit, and train professional advisors.
- Provide back-office planned giving support including illustrations, explanations, donor meetings (when appropriate) and staff training.

*Please note the ***Heritage Partner*** program functions much more independently, utilizing the forms of the ***Legacy Partner*** program, yet without full customization and analysis from the Philanthropy International office.

Evaluation

- Bi-monthly phone appointments to enhance communication and ensure meeting of goals and deadlines.
- Quarterly reports of all online activity sent directly to your charity.
- Annual activity report which describes:
    - Seminars hosted by the CPS
    - Number of gifts completed
    - Value of completed gifts
    - Cases opened
    - Donors contemplating a gift
    - New product developed

Frequently Asked Questions

1. **What is the cost to start in the Partner Charity Program, and how often do we pay?**

   The ***Legacy Partner*** program requires a signed contract to begin customization and production of your website and DVDs plus the first month's payment of $1,500. An electronic monthly payment in the amount of $1,500 will begin the first of the following month.

   The ***Heritage Partner*** program requires a $1,000 set-up fee to begin production of your customized website. An electronic monthly payment in the amount of $350 will begin as soon as the contract is received by us, on the next available date.

2. **What other costs are involved in the Partner Charity Program?**

   Additional costs may be incurred by the charity such as seminar meals, invitation printing and mailing, handouts, hotel room rental, refreshments at donor meetings, and additional brochures and DVD purchases/customization. We recommend you budget approximately $10,000 per year for additional expenses, primarily for the ***Legacy Partner*** program.

3. **How do I get the contact information for a Charitable Planning Specialist in my area?**

   Philanthropy International will introduce the charity leadership to a prospective CPS who is interested in working with the charity. PI will then coordinate an introductory meeting with the charity leader, CPS and PI staff. Upon final approval from the Partner Charity, the CPS will begin work on behalf of the Partner Charity.

4. **Who do I speak to if I am having technical trouble with our customized web site?**

   Please contact the Philanthropy International office at (909) 625-4511.

5. **Where do we put the link to our customized website?**

   You can place your link on your own webpage and distribute to your donors via email, newsletters or in other electronic or print communications.

6. **What does a 3-year commitment to Planned Giving mean?**

   Planned gifts cannot be predicted. We believe a charity needs to commit to a long-term approach and allow the messaging to reach donors on a consistent and regular basis. This is why the contract states it is a 3-year commitment. However, either party has the right to terminate this agreement, with or without cause, upon thirty (30) days written notice, once the initial first-year is complete for the ***Legacy Partner*** program.

7. When will I see the first gift?

Depending on your donor's financial profile, the type of strategy used and a host of other variables, a gift can happen right away or it can take a number of years. We do know people will make planned gifts. We just don't know when.

8. What if we already have a relationship with a professional advisor?

Philanthropy International is willing to work with any existing relationship you have to facilitate planned giving; however, we cannot allow advisors outside our program to access our proprietary marketing materials.

9. Does Philanthropy International draft legal documents?

Philanthropy International does not have an in-house attorney or Certified Public Accountant and thus do not prepare legal documents, tax returns or provide tax or legal advice. However, we are able to provide reference of competent professionals in these areas if the need arises.

10. What are the requirements of being a CPS?

Primary Requirements:

- Experience working with charities, either on the board or interaction through their practice as well as a minimum of 3-5 years of experience in advanced estate or charitable planning.
- Already holding or working toward a CAP degree through American College or similar program approved by Philanthropy International.
- Nomination by their Regional Support Firm.
  (A full listing of CPS requirements is available at http://picharity.org/advisors.)

11. How does Philanthropy International make money?

Philanthropy International makes money via the following venues:

- Partner Charity contracts.
- Charitable Planning Specialist & Advisor Member fees.
- Administrative fees or donations from our Donor Advised Fund program.

12. Our charity has donors across the country. How does Philanthropy International help me reach all of them?

If your charity has multiple regional offices across the United States, it is important to sign up as a Multi-Regional Legacy or Heritage Partner. As a Multi-Regional partner you have a CPS (Charitable Planning Specialist) in each region to implement a customized marketing strategy that fits that particular region. It also enables the charity to have multiple sets of the single-title 1,000 DVDs and customized cover brochures, as that quantity comes with each region participating in the Legacy Partner program.

Our Charitable Planning Specialists are not typically licensed to do business in every state, which prevents them from flying from state to state to service your donors. We can discuss how a plan might be developed to meet your needs, if you are primarily a local charity, but have handfuls of donors in surrounding states.

Conclusion

Philanthropy International is classified as a public charity under the Internal Revenue Code of 1986 as described in sections 501(c)(3), 509(a)(1) and 170(b)(1)(A)(vi). It is structured to operate as a national community foundation that may provide support for any qualified charitable cause.

Most of the charities we know and serve are working hard at their core mission. They often don't have the resources and expertise to put together the essential elements of a successful planned giving department. That's where we come in.

Our passion is to help charities concentrate on carrying out their core mission without the daily concerns of funding. We help them learn how to solicit and attract larger planned gifts through tax-exempt planning. With our help, they can do this without incurring huge staffing and operational costs.

We hope you will consider including Philanthropy International in your future planned giving efforts.