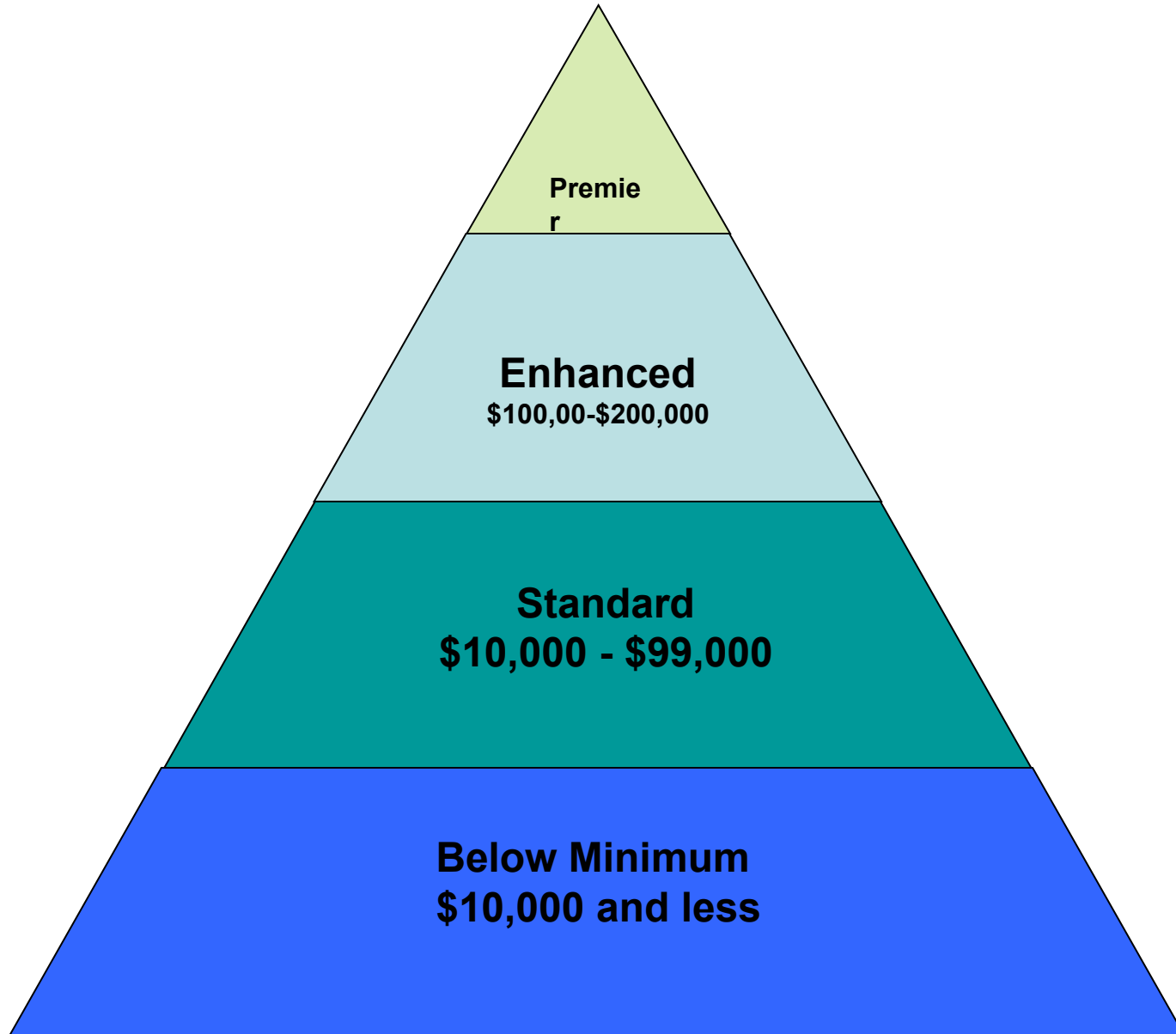
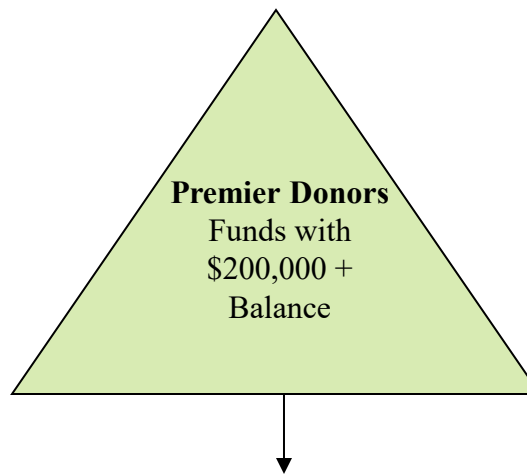


LEVELS OF SERVICE





<i>Linda and David Glickstein</i> Linda & David Glickstein Fund	<i>Estate of Elise B. Reimann</i> Stanley P. Reimann Fellowship Fund	<i>Thomas and Monica Teesdale</i> Thomas and Monica Teesdale Charitable Trust Fund	<i>Alan and Nancy Hirsig</i> Hirsig Family Fund
<i>Barbara and Jack Tarditi</i> Barbara and Jack Tarditi Fund	<i>Rudolph Ellis - Deceased</i> <i>(ADVISOR Robert Prischak)</i> Rudolph Ellis Memorial Fund	<i>Julie Spahr</i> Darling Fund	<i>Mel Heifetz</i> Mel Heifetz GLBT Donor Advised Fund
<i>William S. Colehower</i> H. Howard Colehower Foundation Fund	<i>Barbara and Edward Scolnick</i> Barbara and Edward Scolnick Family Fund	<i>David V. Shapiro</i> Harry Shapiro Fund	<i>Eugenio and Giuliana Calabi-ANON</i> Calabi Fund
<i>Barra Foundation</i> <i>(Robert McNeil ANON)</i> Brewster Fund Brewster B Fund	<i>Mary Ann McCluney – ANON</i> Put Your Money Where Your Mouth Is Fund	<i>Patricia Imbesi</i> The Imbesi Family Charitable Fund	<i>Estate of Virginia Brown Martin</i> <i>(ADVISOR Gene Dilks)</i> Virginia Brown Martin Fund
<i>Susan Horsey</i> Susan Helen Horsey Fund	<i>James H. Bryson</i> James H. Bryson Fund	<i>Christopher B. Asplundh</i> Christopher B. Asplundh Family Fund	<i>Michael Miles (ADVISOR Jen Miles)</i> The Miles Family Fund
<i>Micheal Kelly and Joan Mazzotti</i> Mazzotti/Kelly Fund	<i>John Ryan</i> Ryan Family Fund	<i>Edward and Carroll Lewis</i> <i>Boylan Lewis Fund</i>	<i>Margaret Harron</i> The Harron Family Fund
<i>Borowsky Family Foundation</i> <i>(ADVISOR Gwen Borowsky)</i> Borowsky Family Fund	<i>Dr. Ruth W. Hayre</i> Wright-Hayre Fund	<i>Parents, Inc</i> <i>(ADVISOR Carol Haas Gravango)</i> Carole and F. Otto Haas Fund	<i>Steven and Denise Doherty</i> Julianna Doherty Fund
<i>Ann and G. Davis Greene Jr.</i> Peter A. Wiley and Elizabeth Greene Wiley Fund Mount Pleasant Fund			

Enhanced
\$100,00-\$200,000



<i>Barbara Yaseen Tiffany</i> Barbara Yaseen Tiffany Fund	<i>David Haas and Lise Yasui</i> Neuroblastoma Fund	<i>Brian and Diane Dowd</i> Alli's Friends Fund	<i>Raymond Hansell and Marysue Lucci Hansell</i> Montangelica Fund
<i>William and Rhonda Levy (CO-ADVISORS– Bill Levy and Daniel Levy)</i> Richard L. and Suzanne S. Levy Fund	<i>Theo and Khristina Claudia Ratliff</i> Theo Ratliff Fund	<i>Jim and Megan Gorman</i> Henry's Fund	<i>Alyce Schroth</i> Ruth Widmer Fund for Animal-Assisted Therapy Fund
<i>James Mitchell (ANON)</i> JCM Direct Fund	<i>Lee Van de Velde</i> Helen B. O'Bannon Memorial Fund	<i>Robert and Isabelle Gundaker</i> Robert G. and Isabelle W. Gundaker Family	<i>Paul and Debby Bookman</i> Save a Heart Fund
<i>Scott Coffina and Bonnie Ravina</i> Coffina Ravina Fund	<i>Paul and Cheryl Schlenker</i> The Paul & Cheryl Schlenker Charitable Fund	<i>Robert Johnson</i> Johnson Family Fund	<i>Jeff and Debbie Darlin</i> Darlin Fund

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Standard
\$10,000 - \$99,000

A blue trapezoidal box with a black border, containing white text.

**Below Minimum
\$10,000 and less**

A blue trapezoidal box with a black border, containing white text.

**Below Minimum
\$10,000 and less**

Donor Services Offerings

- Respond to all inquiries
- Access to Donor Central
- Provide Gift Receipts
- Receive invitations to some Donor Events
- Create Fund Brochure
- List Fund and Contributors in Annual Report



Standard
\$10,000 - \$99,000

Donor Services Offerings

- Respond to all inquiries
- Access to Donor Central
- Provide Gift Receipts

- Receive invitations to some Donor Events
- Create Fund Brochure
- List Fund and Contributors in Annual Report

- Provide grantmaking research for organizations that have been funded by the Foundation in the past (format for research results needs to be determined)
- Send periodic mailing to Donor about different topics – i.e. updates on Foundation grantmaking, planned giving opportunities, “did you know” postcards
- Opportunity to partner with the Grantmaking Services Department’s discretionary cycle.
- Develop a strategic plan for fund and a Development Staff person will be assigned to you for annual call or visit.



Enhanced
\$100,00-\$200,000

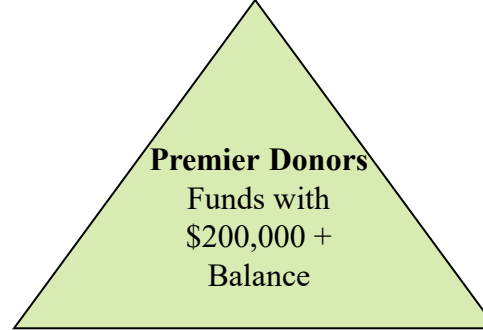
Donor Services Offerings

- Respond to all inquiries
- Provide Quarterly Fund Statements
- Sign up for Donor Central
- Provide Gift Receipts

- Receive invitations to some Donor Events
- Create Fund Brochure
- List Fund and Contributors in Annual Report

- In depth research for related to donor's interest area (format for research results needs to be determined)
- Send periodic mailing to Donor about different topics – i.e. updates on Foundation grantmaking, planned giving opportunities, “did you know” postcards
- Opportunity to partner with the Grantmaking Services Department's discretionary cycle.

- Invites to “Speaker Series” – high quality speakers talk about community issues
- Annual Staff Visits
- Develop a Philanthropy Plan (i.e. mission statement or grantmaking or planned giving or family meeting)
- Family Foundation Services –Sliding scale fee for service
- TPF may select donor for Organizational memberships (i.e. WAC)



Donor Services Offerings

- Respond to all inquiries
- Provide Quarterly Fund Statements
- Sign up for Donor Central
- Provide Gift Receipts

- Receive invitations to some Donor Events
- Create Fund Brochure
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- Send periodic mailing to Donor about different topics – i.e. updates on Foundation grantmaking, planned giving opportunities, “did you know” postcards
- Opportunity to partner with the Grantmaking Services Department's discretionary cycle.

- Invites to “Speaker Series” – high quality speakers talk about community issues
- Annual Staff Visits and grantmaking plans
- Family Foundation Services –Sliding scale fee for service

- Periodic invites to targeted events with the President/Sr. Manager
- Office space and Voice mail
- Acceptance of Proposals for grantmaking
- Private Foundation Services (TPF needs to define what these services are)
- Family Foundation Services –sliding scale fee for service
- TPF may select donor for Organizational memberships (i.e. WAC)

New Fund Process

- Development Staff member meets with/ speaks with prospect
- Fund agreement is signed and money is received
- Gift is entered by Finance Department
- Gift Receipt is given to Development/Donor Services Department to send welcome letter (Welcome packet to be developed)
- Donor is placed in a Tier level and coded in FIMS according to Tier Level, Rank and Potential
- Relationship Manager is assigned to Fund
- Welcome Packet is sent to all donors
- Depending on Tier level, fund potential and rank, a Relationship “Team” is assigned
- A member Development Staff will be assigned each donor in the Standard Tier level
- One week after Fund is completely established, Relationship Manager calls to Welcome Donor
- For Top two tier levels, a welcome visit is arranged with two staff members to review donor profile and grantmaking objectives
- Relationship Manager creates donor plan for each donor and mapped into FIMS
- All staff involved in donor management process should meet monthly to discuss donor and fund progress and to review new donors.



Staff Roles in providing Donor Services for the following Tiers

Relationship Manager:

- Manages, oversees and tracks relationship with Donor
- Responds to Donor Inquiries
- Maintains scheduled correspondence with Donor

Program Officer:

- Provides grantmaking information as requested by donor
- Grantmaking research provided may be limited to information on file in FIMS unless otherwise requested by Relationship Manager or Senior Management

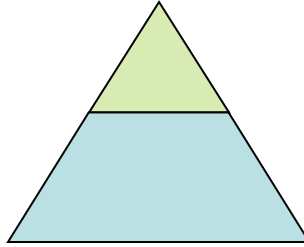
Development Associate:

- Tracks information in FIMS including
- Fund agreement, correspondence, any biographical information or special handling notes

Communications Officer:

- Meets with Development Staff to develop Donor Bio

Staff Roles in providing Donor Services for the following Tiers



Relationship Manager:

- Manages, oversees and tracks relationship with Donor
- Develops Maintains and modifies donors philanthropic plan
- Responds to Donor Inquiries
- Maintains scheduled correspondence with Donor
- Notifies other departments to determine best individuals to serve on team (i.e. explore existing relationships, knowledge base in grantmaking area etc.)

Program Officer:

- Provides grantmaking information as requested by donor
- In depth grantmaking research
- When applicable, attends annual meetings with Relationship Manager and Donor to discuss grantmaking options.
- Partner with Donors in competitive process and other grantmaking opportunities

Development Associate:

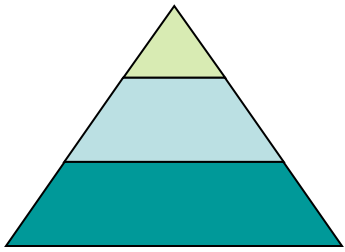
- Tracks information in FIMS including donor interest codes
- Fund agreement, correspondence, any biographical information or special handling notes
- Creates electronic calendar for tracking ongoing communication and follow up

Communications Officer:

- Meets with Development Staff to develop Donor Bio

Systems analyst:

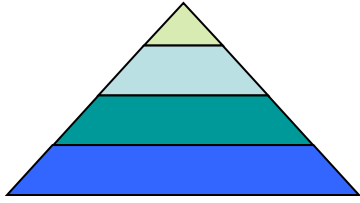
- Works with Development/Donor Services Department to determine needs for ongoing electronic tracking/recording



Welcome Donor Kit

**The following Tiers will receive a welcome handbook and a follow up call from the Relationship Manager.
The following materials will be included in the Welcome Kit:**

- Mission of The Philadelphia Foundation
- Board of Manager and Past Board Members
- Description of Departments within The Philadelphia Foundation with Contact information
- Copy of Fund Agreement
- Interview Form to be completed by Donor in order to create a philanthropic plan
- Form to be completed in order so that Communications Officer may create Donor Bio
- Donor Advised Recommendation Form
- Donor Advised Guidelines
- Sample Quarterly Fund Statement with explanation of how to read statement
- Description of how to partner with The Philadelphia Foundation
- Information on Planned Giving
- Fundraising Policy
- Grantmaking and Gift giving Deadlines
- Instructions for transferring stock and wiring cash
- One sheet discussing ways to support TPF's general operating fund or Field of Interest Funds
- Investment policy
- Current investment returns



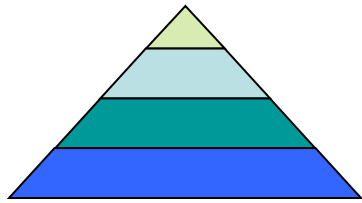
Electronic Mapping Process

The following information should be captured in FIMS for every new Donor

- Full name and Salutation of Donor
- Address
- Alternate Address (if applicable)
- Work phone
- Home Phone
- Cell Phone
- Email
- Preferred form of contact
- Name of Spouse/Partner (if applicable)
- Home Phone
- Work Phone
- Cell Phone
- Email
- How the couple wishes to be addressed in formal correspondence
- Any relationships to family members, current donors, prospects, professional advisors or staff/Board members
- Successor Advisors (if applicable)
- Tier Level
- Potential Level
- Occupation
- Source – How they heard about TPF
- Do they wish to remain anonymous
- Birth date
- Deceased Date (if applicable)

- Fund creation date (date that contribution is made)
- Fund Spokesperson Code
- Cultivation contact Code
- Spending Policy letter Code
- Donor Advisors Code
- Fund Founder Code
- Give Donor Central Access

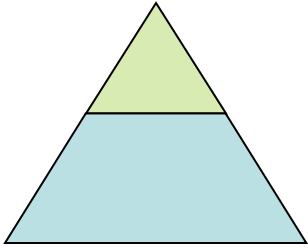
- Map Meeting dates
- Map follow up meeting dates
- Plans for next meetings
- Philanthropic interest areas
- Interests in Educational Opportunities
- Interests in Grantmaking Partnerships
- Interests in learning about community issues
- Organizations that the Donors have funded prior to creating TPF Fund
- Current and past Board memberships
- Reason for creating the Fund
- Expectations for working with TPF
- Ongoing donor assessment of their work with TPF
- Link different donors who have similar interest areas



Electronic Mapping Process

FIMS will need to be customized in order to accommodate the following information

- Map Meeting dates
- Map follow up meeting dates
- Plans for next meetings
- Philanthropic interest areas
- Interests in Educational Opportunities
- Interests in Grantmaking Partnerships
- Interests in learning about community issues
- Organizations that the Donors have funded prior to creating TPF Fund
- Current and past Board memberships
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- Expectations for working with TPF
- Ongoing donor assessment of their work with TPF
- Link different donors who have similar interest areas



Family Philanthropy (name to change)

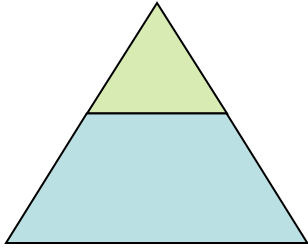
The Philadelphia Foundation may work directly with groups of individuals who have a desire to provide a joint effort to achieve a common goal through philanthropy.

Groups may be composed of:

- Traditional or Nontraditional Families
- Groups of individuals working towards a common cause (i.e. a women's giving circle)
- Executors of Estates

The Philadelphia Foundation may work directly with the donor groups or partner with other trained professionals to provide services to the donors on a contractual basis. Such other professional groups that may be part of the provider network may include, but may not be limited to:

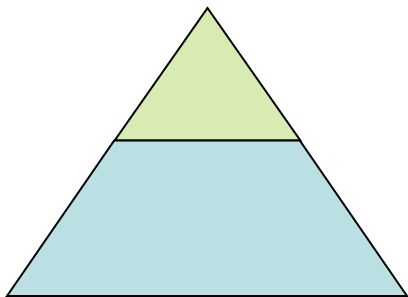
- The Philanthropic Initiative
- The National Center for Family Philanthropy
- Delaware Valley Grantmakers Association



Family Philanthropy (name to change)

In order to provide the professional service that we strive for the following tools may be needed:

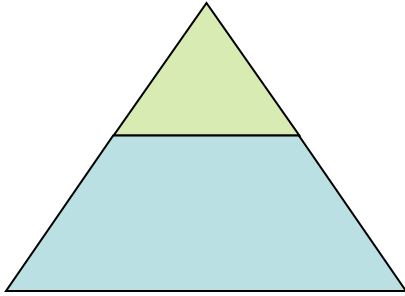
- **Training for TPF Staff** – to learn how to deal with family or group dynamics, learn when it is necessary to bring in a professional etc.)
- **Marketing support** – additional marketing products may need to be developed to expose families to this program as well as ongoing materials to keep the family engaged
- **Membership to the National Center for Family Philanthropy** – this will provide the foundation and member donors access to a website, articles and tools for ongoing communication.
- **Ongoing partnership with The Philanthropic Initiative**



Family Philanthropy (name to change)

In the first year of this program, it is anticipated that that The Philadelphia Foundation will offer these services on a hand selected basis based on the following criteria:

- Fund must have an endowed component
- Fund must have at least \$100,000 endowed
- Primary Donors must have expressed an interest in pursuing more strategic grantmaking
- Priority may be given to those donors who have additional potential for giving a current or deferred gift or has already made a planned gift.



Family Philanthropy (name to change)

What the program will look like to the Donor Members

A marketing brochure will be created to outline how the program works. The brochure will include:

- Mission of the program
- A description of services offered
- A menu of services including a sliding scale fee depending on services chosen and fund size