



Starting Point

A Local Christian Foundation Primer

Welcome! On behalf of the National Christian Foundation, we welcome your interest in forming a local Christian foundation (“LCF”). This “Starting Point” is a primer, an overview of what an LCF is, why it is important and how one is started. We will not cover every step of the process in this document, however. Once you are done digesting the following pages, you will be ready to develop a more specific game plan. We will discuss future steps in more detail below.

We hope this information is helpful and encouraging to you, and ask that you let us know how we can make it clearer and more relevant. May God richly bless you as you seek to know and follow Him in undertaking this important ministry to your community.

I. History

The LCF movement is relatively new. In 1982, Larry Burkett, Ron Blue and Terry Parker founded the National Christian Foundation (“NCF”). NCF is considered the oldest and largest interdenominational public foundation using a community foundation model. Since 1992, LCFs have grown gradually but steadily. The LCF and the donor advised fund—the primary tool of an LCF—represent one of the fastest growing forms of Christian giving in the country.

While LCFs are relatively new, community foundations have existed in the U.S. since 1914, and hold an estimated 12 billion dollars in assets nationwide. These community foundations serve primarily civic interests and usually give a smaller percentage of their gifts to the cause of Christ. There will be more about the distinction between LCFs and community foundations below.

A number of factors are fueling the recent growth of the LCF movement. *First*, there is more wealth than ever before in America as well as in the Christian community. “By 2000,” an article in the Harvard Business Review states, “nonprofit assets had reached \$2 trillion, and total revenues exceeded \$700 billion. And as the baby boomers move into their prime giving years over the next two decades, they are expected to bequeath or donate trillions of dollars” (Bill Bradley, Paul Jansen, Les Silverman, “The Nonprofit Sector’s \$100 Billion Opportunity”, *HBR*, May 2003). If 36.5% of all charitable giving goes to religion, it is natural to expect that a hefty portion of that anticipated windfall will go to Christian work (Source: *Giving USA 2001*). *Second*, because there is more wealth, there is a greater need to serve those people who desire to be faithful stewards and want to make sure their wealth gets used for uniquely Christian purposes. *Third*, people want the simple solutions that an LCF can provide. *Fourth*, there seems to be a growing recognition of the biblical principle that God truly owns all that we have, and that we as His people must be faithful to give, to use financial resources for His Kingdom, and not to hoard them. *Lastly*, people hunger for unity and effectiveness within the Christian Community. An LCF can be a significant platform for that unity and effectiveness.

NCF is committed to serving those who have a desire to grow relationships with donors, ministries and churches in their communities. We are here to serve you!

II. What is An LCF?

An LCF is a public foundation which focuses on helping individuals (with a common vision for funding the work of God’s kingdom) live out their calling as stewards, and to that end establishes donor advised funds and provides other charitable solutions.

A typical secular community foundation uses many of the same tools, but is fundamentally different in purpose. In legal terms, as expressed by the Council on Michigan Foundations,

A community foundation is a tax-exempt, independent, publicly supported philanthropic organization established and operated as a permanent collection of **endowed funds** for the long-term **benefit of a defined geographic area** (emphasis added).

A typical LCF differs in that its primary goal is not to establish endowments for the common good of the community, but rather to encourage and enable *individuals* to give generously to the kingdom work that is important to them. We are intent on “releasing capital for the Kingdom,” in one manner of speaking, which is not to say that we never hold endowments, or that the common good is outside our vision. As we will explain below, we are very concerned about the particular needs of individual communities. But it is worth emphasizing that we are first and foremost citizens of a kingdom that is “not of this world” (John 18:36).

Consider the basic elements of an LCF’s mission:

- To develop and encourage Christian giving;
- To seek out and encourage ministries and organizations that bear witness to Christ’s Kingdom and work toward community transformation;
- To distribute resources donated by Christian stewards to these ministries.

More dynamically, an LCF is a network of donors, ministries and churches responding to God’s call in their lives. Some say an LCF brings the “donors” and “doers” of a community together. Because it has that ability to bring people together and cut across denominational lines, an LCF can serve as a tremendous catalyst for change in a community.

III. Why a Local Christian Community Foundation?

A Theological Overview

It is easy to think that an LCF is merely another way to “get” money for the Kingdom. But it is important to keep our focus on the Father even as we use material wealth for His glory. He doesn’t need the money – but He does care a great deal about the hearts of His people.

Broadly conceived, the work of an LCF is the same as it is for the rest of the body of Christ: making “the body grow so that it builds itself up in love” (Eph. 4:16). We are growing each other up in love because Jesus has loved us so lavishly to begin with. For LCFs, this means nurturing relationships with donors in order that they might know the Father better as they “excel in this grace of giving” (II Cor. 8:7), serving them by providing opportunities to give and sharing a vision with them for the transformation of your community. It means developing relationships with the church and her ministries and channeling funds to them; preaching the gospel; visiting the sick and imprisoned; making disciples; caring for the fatherless,, strangers and widows; serving the poor; and so on.

When we give, preach, and serve with pure hearts, we better learn the character and will of God – the true Giver, Shepherd, Servant – and we reflect His character more completely to those around us.

Keeping it Local: Loving our neighbors

The God of Israel laid down the eternal law: “love your neighbor as yourself” (Leviticus 19:18).

“It is sin,” King Solomon later observed, “to despise one’s neighbors; blessed are those who help the poor” (Prov. 14:21, NLT).

Jesus echoed his forebears as he enumerated the two greatest commandments: Love God, and “love your neighbor as yourself” (Mt. 22:39). And the apostle Paul agreed: “The entire law,” he wrote to the Galatians, “is summed up in a single command: ‘Love your neighbor as yourself’” (5:14).

Which brings up a very important question: *who is my neighbor?* It is this question, put to Jesus by an expert in the law in an attempt to justify himself, that set the stage for the Parable of the Good Samaritan. The question Jesus shot back at him was as clever as it is piercing. When *you* are in need, who is *your* neighbor? “The one who had mercy on him,” the expert replied (Luke 10:37). In other words, our neighbor could be anyone at all, including (and perhaps especially) those we like the least.

We naturally associate with our own kind. Conversations are easier, idiosyncrasies less obvious and interactions more comfortable with those who share our interests; our backgrounds; our circumstances. And this kind of homogeneity can be quite beneficial. For example, witness the popularity of professional conferences: from financial advisors to professional historians to marionette puppeteers – everyone has a conference. Not only do attendees find acceptance and certain legitimacy from their peers, but they can also sharpen each other and develop better ideas, practices and skills.

Jesus, however, makes it clear that this is not the extent of our calling as his disciples. We are to be neighbors to all kinds of people, especially to the Samaritans in our lives. Namely, to those we don’t like, or who don’t like us, or who especially need our help.

What better place to pursue this sort of “Gospel neighboring” (as Dr. Tim Keller has put it) than in our local communities? In a local setting, it is possible to work together with very diverse groups toward a few common goals: the knowledge of Jesus, the transformation of the community and so on. The needs are more obvious, the cries easier to hear and the solutions easier to see, to try and to evaluate. A mass crusade can be a powerful way to win hearts, but it is more often than not the community’s follow-up effort that makes the difference in the lives of converts. Solomon seemed to think similarly: “Do not forsake your friend and the friend of your father, and do not go to your brother’s house when disaster strikes you – better a neighbor nearby than a brother far away” (27:10, NIV).

Keeping It Local: A platform for relationship

The late Joseph Bayly’s “The Gospel Blimp” is an uncomfortably-accurate portrayal of the ways Christians have tried to evangelize the lost. The Christians in Bayly’s story imagine a “Gospel blimp” that floats around the city carrying signs proclaiming various evangelistic messages, dropping brightly colored leaflets and broadcasting Gospel invitations and music over loudspeakers. The organization they establish, International Gospel Blimps, Inc. (IGBI), grows rapidly in influence and prestige, hiring full-time staff,

implementing an aggressive public relations plan and eventually partnering with local business leaders in order to secure funding and broaden its appeal.

But IGBI never accomplishes its true purpose – no one comes to Christ as a result of their appeals. Even as more and more of IGBI’s efforts go toward organizational preservation, at least one of the IGBI board members sees how it has missed its target. Realizing that his beer-drinking, card-playing next-door neighbors are not being won by the blimp, he starts building a friendship with them instead. His neighbors do meet Jesus, but not, as you might imagine, because of the blimp.

Bayly’s story illustrates something we believe in very strongly at NCF: programs and institutions are not ends in themselves, but platforms for relationships. We do want to bring in billions of dollars for the kingdom, but if we were to manage that through mere financial transactions, all our efforts would be for naught. “If I gave everything I have to the poor and even sacrificed my body, I could boast about it;” Paul cried, “but if I didn’t love others, I would be of no value whatsoever” (I Cor. 13:3). It is the place of an LCF president and staff to build relationships with Christian stewards, help them find ministries to support and challenge them to greater love and generosity.

An LCF is uniquely poised to cultivate community change. An LCF regularly meets with donors, professional advisors, pastors, church members, ministry leaders and ministry supporters, from many denominations and walks of life. An LCF has the capacity to start conversations in almost every sector of the Christian community; to develop the kind of trans-denominational relationships that are so rare among Christians. This capacity makes the LCF a key networking agency, a convener, a platform for broad-base Christian projects. LCFs have done and may do all of the following:

- Bring together Christian community leaders to define the key ministry needs in the community;
- Communicate to local citizens these needs and a vision of how to meet them;
- Establish grant strategies to meet those ministry needs—all with an eye toward community transformation;
- Facilitate stewardship training and development for churches and Christian ministries;
- Provide planning, program models, communication and leadership training for local ministries;
- Develop and maintain an up-to-date list of local Christian ministries and organizations to which donors can recommend grants with confidence;
- Provide administrative support for Christian stewards by way of donor advised funds, trust management and other charitable tools;
- Manage entrusted assets in order to provide significant funding in the community;
- Provide various financial plans, education and tools that Christian stewards can use to maximize their gifts to organizations and ministries.

Though not exhaustive or conclusive, this list should suggest that an LCF can play an important role in bringing God’s Kingdom to bear in your community. The specific methods and manifestations will be part of the adventure on which the Holy Spirit will lead you as you seek first the Lord’s kingdom and righteousness (Mt. 6:33).

IV. What Will It Look Like?

Five Focuses

The five strategic areas of focus, crucial to the LCF's success, are as follows:

1. ***Prayer:*** Praying daily for the community, the LCF's impact on the community, the meeting of the donors' God-given goals and the Christ like thoughts, actions and work of the LCF staff and board.
2. ***Donor Relationship Development:*** Intentionally discovering, developing, educating and nurturing Christian stewards in their charitable giving.
3. ***Community Transformation:*** Researching ministries within the community, identifying strategic ministry initiatives and defining a vision and grant strategy to meet the strategic needs of the community.
4. ***Communications:*** To develop and implement a plan to effectively communicate the work of the LCF to donors, ministries, churches and the community at large.
5. ***Administration:*** To administer the daily business of the LCF itself and to facilitate the receipt and distribution of gifts.

A Roadmap

The following list is meant to give you an overview of your journey toward establishing an LCF. Think of it as a quick sketch roadmap.

- A group of you will sense God's leading to start an LCF in your community. This can happen in as many different ways as people hear from God, but it is important that it happens as you are seeking and trusting in Him.
- You will form a steering committee whose primary functions will be to assess the needs and opportunities of the community and to provide vision, contacts and direction for the LCF.
- The steering committee should lead to the establishment of a board of directors. The board will adopt the mission and provide for the governance of the LCF. An excellent board will provide the momentum for the organization.
- The legal structure of the LCF will be established.
- Funding for the operations of the LCF will be established through the steering committee and/or board.
- Once a board is established, the Executive Director or President will be selected. This staff selection is one of the most critical factors in the early and ongoing success of the LCF.
- The Executive Director, working in conjunction with the board, will begin researching and establishing the community's needs and priorities.
- The Executive Director will receive training from NCF and will begin implementing the LCF's marketing plan.
- Following the first three months of marketing, there will be a time of assessment and evaluation to determine if any changes in approach are necessary.

V. Why become part of the network of foundations affiliated with NCF?

NCF: Enabling Faithful Stewards

NCF is a Georgia non-profit corporation and tax-exempt public foundation, contributions to which are fully deductible as allowed by law, under Section 501(c)(3) and Section 170(b)(1)(A) of the Internal Revenue Code. We focus particularly on four areas of service: professional financial advisors, ministries and their donors, faithful stewards and, of course, LCFs. For more information on NCF's broader ministry, please visit www.nationalchristian.com or call 404.252.0100 to request a brochure.

NCF has a few special characteristics as an organization that may be particularly interesting to you:

Experience. Each year since its founding in 1982, NCF's ability to serve donors effectively has improved. In the last 22 years, NCF's 2,000 plus donors have recommended over \$500 million to thousands of ministries. In 2003, ministries received nearly \$115 million through NCF and its donors. Since 2000, we have processed nearly \$225 million in complex gifts such as real estate, closely held stock, insurance policies and more – a service that is increasingly in demand.

Faithful staff. NCF has gathered together 34 employees with a strong commitment to excellence and Christ-like service. In particular, our EVP of Foundation Services, Dave Worland, has experienced the tumultuous years of starting an LCF (he founded the Chattanooga Christian Community Foundation and served as the president for seven and a half years before coming to NCF in 1999). His passion for the work of LCFs and his ability to empathize and advise will be a great asset to you as you seek to establish an LCF in your community.

Commitment to LCFs. As of May 2004, NCF already serves fifteen LCFs as affiliates (see www.nationalchristian.com for a complete list). We have committed ourselves to the LCF movement to the degree that we see it as our primary distribution channel in the future. Where other organizations have chosen to place regional representatives, we have chosen LCFs as the best way to extend our services to donors across the country.

To this end, we have already invested approximately 1.5 million dollars in the LCF Affiliate Initiative in human, systemic and technological capital. We have budgeted another three hundred and fifty thousand dollars next year and anticipate budgeting at least two hundred and fifty thousand a year ongoing. We want to “co-labor” with LCFs who want to work together for the long-term benefit of their donors. It is our hope that in this way “we will in all things grow up into him who is the Head, that is, Christ” (Ephesians 4:15).

NCF and LCFs: Being the Body

Before addressing more specifics of affiliating with NCF, a few words on our unity in Christ as a part of His church.

Same Goal. NCF and LCFs are united in purpose, both in the broad sense that we love and obey Jesus (John 14:15-26) and, more concretely, in the following ways:

1. We want to “enable faithful stewards to give wisely to further the Gospel of Jesus Christ,” as it is rendered in NCF's mission statement.

2. We want to see hearts changed, so that God's people are challenged to greater generosity and love; we want Christians to follow the example of Christ who "was very rich, yet for your sakes he became poor" and "excel also in this gracious ministry of giving" (2 Cor. 8:8,9, NLT).
3. We want to see the lost and needy reached with the full Gospel of Christ: "to preach good news to the poor... to bind up the brokenhearted, to proclaim freedom for the captives and release from darkness for the prisoners" (Is. 61:1, NIV).
4. We want to see the Kingdom of Heaven lived out in communities across the nation so that the wealthy give, the church is purified, the widows and fatherless and strangers are visited and cared for, and the unbelieving have the Gospel preached to them (2 Cor. 8, James 1:26-27, Luke 24:44-49).

Different Roles. Affiliation presents a great opportunity to provide Christian stewards with services that are simple, flexible and relational. Together, we can be more effective in encouraging and facilitating wise and generous giving. As King Solomon wrote: "Two are better than one, because they have a good return for their work: If one falls down, his friend can help him up. But pity the man who falls and has no one to help him up! . . . Though one may be overpowered, two can defend themselves. A cord of three strands is not quickly broken" (Ecc. 4:9-10, 12).

Think of it this way: NCF provides a large staff with the technical expertise, the systems, processes and resources that come with 20 years of experience. The LCF does the ground-level work of building relationships and "Gospel-neighboring" – loving donors and keeping its finger on the pulse of the local community's needs and priorities. Donors give, and give generously, and get involved with local ministries. Meanwhile, ministries preach the Gospel of Christ in word and deed. Put differently, programs provide a platform for relationships, which have an eternal impact.

To use an analogy, imagine a relay race. The first runner out of the blocks is NCF, holding the baton of, say, "Resources". NCF hands the baton to the LCF, who runs the course of relationship to hand those resources to the Donor. The Donor in turn gives resources to the Ministry who runs the last leg of the race, to win the prize of the knowledge of Christ, the presence of His kingdom, the transformation of hearts and communities (Phil. 3:12-14, 1:27-30). Because the runners are truly united in their common goal, each is able to focus on their leg of the race. They also gain the benefit of their collective strengths while helping to minimize each other's weaknesses. And they receive the blessing of tasting Christ's glory together.

Of course, working together can also be more difficult or frustrating than going it alone. And there is the danger that we become mere specialists, concentrating so much on our own part of the task that we discredit or remain distant from other. But the dangers and difficulties should not keep us from seeking to "be the body." As King David reminded us in Psalm 133, unity and community come from above:

It is like precious oil poured on the head,
 running down on the beard,
 running down on Aaron's beard,
 down upon the collar of his robes.
 It is as if the dew of Hermon
 were falling on Mount Zion.
 For there the LORD bestows his blessing,
 even life forevermore.

It is not enough, for instance, that NCF employees help donors and ministries; they ought to be involved in giving and service themselves. In affiliation, we seek unity and cooperation with humility and prayer, as a gift only God can give.

The Details: Features and Benefits of Affiliation

As promised, what follows is a) an outline of the “package” NCF offers to LCF affiliates and b) some details of that package’s contents.

A. Outline of Affiliate Services

1. **Gift Planning Services.** NCF can assist the LCF President/Executive Director as he or she identifies donors with large estates that require complex planning. With multiple decades of experience in charitable gift and estate planning, NCF's gift planning team is also prepared to contribute to the LCF's relational objectives through article preparation, seminar/conference speaking and by providing training/mentoring opportunities for LCF staff.
2. **Giving Fund Services.** NCF can provide multiple “private labeled” Giving Funds (also known as Donor Advised Funds) for the LCF which can be used to manage the various gifting programs designed by the LCF. These LCF Giving Funds are fully administered and operated by NCF, allowing the LCF to focus its resources on promoting the fund rather than administering it. Giving Fund services may significantly expand the options available to high net worth donors associated with the LCF.
3. **Complex Gift Services.** Complex gifts – outright gifts of business interests, closely held entity interests, real property and tangible/intangible property interests, as well as split interest charitable trusts – often involve considerable time and expertise in receipt, administration and disposition. NCF has put a great deal of effort into developing these services and can assist the LCF as needed in handling such gifts in an effective manner. This service ties in well with the gift planning and Giving Fund services because of the expanded options it provides for the LCF's donors and related ministry donors.
4. **Charitable Gift Annuity Services.** The Charitable Gift Annuity is a tax-advantaged gift strategy that, due to its lower dollar threshold, is within reach of the majority of LCF donors over 65 years of age. Most LCF donors nearing or in retirement could remember the LCF, their church, or other local ministries in their wills with at least a \$10,000 gift. The Charitable Gift Annuity allows them to establish that gift in a manner that allows for tax advantages and a favorable payment rate each year, which benefits the donor more during his or her life than if he or she simply made the gift through their will. Using NCF services for administration of this program in a "private labeled" environment allows the LCF to focus on building relationships.

NCF selectively offers these services to LCFs at no cost in order to assure a positive impact on the LCF budget. NCF covers its costs through the participation fees assessed to the gifts, trusts and gift annuities as they are received and administered. Generally these fees average one percent or less annually.

B. *Affiliate Service Details*

1. Giving Fund Service Delivery

NCF will provide the entire **Giving** (or Donor Advised) Fund system to the LCF. This system includes the ability to:

- *Receive* and *receipt* gifts
- *Manage* each account
- *Invest* the fund balance in actively managed or indexed portfolios. Independently managed accounts are available for Giving Funds with \$1,000,000 or more.
- *Distribute* gifts from the Giving Fund to ministries
- *Statement processing* for each of the Giving Funds
- *Internet donor fund management* for access to the Giving Fund accounting when you need it.
- *Foundation reporting* for aggregate reporting on all the funds held at NCF.

2. E-Foundation Management

Manage your related Giving Funds electronically through an innovative web portal that will enable you to provide more effective Giving Fund services to your donors. E-Foundation Management promises to be a powerful tool, allowing the LCF to accomplish all of the following tasks in a user-friendly web environment:

- View donor activity
- View and print foundation management reporting (including revenue sharing)
- Manage web content for LCF-specific pages
- Submit and record distribution requests
- Download/order from a catalog of marketing materials

This indispensable tool will be consistently upgraded for improved interaction with givers and advisors. Accordingly, NCF will continue to research and develop tools, techniques and services for LCF donors.

3. Investment Management Services

Contributions to Giving Funds are invested in one of several active or indexed portfolios. You may recommend one portfolio for donated assets based on your investment objective(s). NCF usually allocates all investment earnings or losses from a fund back to the Giving Fund, minus any fees related to the management of the fund. However, the IRS requires that earnings belong to NCF, and that NCF makes all decisions regarding the allocation of these earnings.

4. Trusts

A trust is an excellent way for your donors to balance financial and charitable objectives. The National Christian Foundation can serve as a vehicle for

administering a *charitable lead trust* or *charitable remainder trust* – both of which carry distinct advantages.

Charitable Lead Trust – When a donor establishes a charitable lead trust with The National Christian Foundation, the money in the trust is paid to a Giving Fund at NCF first for a specified number of years. After that time, the balance goes to his or her family or other non-charitable beneficiary.

Charitable Remainder Trust – Conversely, a charitable remainder trust provides the donor (or another non-charitable beneficiary) with income from the trust *first*. At the time of his or her death or at the end of a specified period of time, a fund at NCF becomes the beneficiary of the remainder of the trust.

5. Collateral Materials

Website – NCF has developed a private-labeled, donor-interactive, content-rich website, which may include LCF information and online access to account management.

Printed marketing materials – On an ongoing basis, NCF is developing printed marketing materials that can be private-labeled for your purposes. They fall into the following broad categories:

- Constituent brochures (families, professional advisors, etc.)
- Product brochures (Giving Funds, complex gift services, etc)
- Planning brochures (trusts, wills, life insurance, etc)

Speakers – NCF can assist you in securing speakers, both inside and outside NCF, for donor events designed to spread the word about the LCF's ministry, success and additional opportunities around the world.

Events – NCF will assist the LCF in setting up local events designed challenge and educate donors, professional advisors, ministries, churches and other constituents, and to spread the word about the LCF's work in the community.

6. Set of Operating Guidelines and Training

NCF has developed efficient systems and procedures, processes and workflow, and uses cutting edge technology for the creation of donor and management reports. The LCF Operating Guidelines will show how to use those systems and procedures effectively, as well as help synchronize the message and activity of NCF and the LCF.

We also provide orientation training for all LCF support staff that will be coordinating Giving Fund activity with NCF. In addition, from time to time NCF may provide additional training sessions designed to refresh and update LCF staff members. Perhaps more importantly, NCF is committed to being a valuable resource to the staff, board of directors and friends of the LCF for gift planning and acquisition, fund management investment and grant distribution. If you have specific training needs, please let us know.

7. Competitive Costs

NCF and the LCF share a common Revenue Sharing and Cost Allocation Schedule for Donors. The schedule begins at 1 percent for the first 1 million dollars and goes

to 35 basis points for funds over 10 million dollars. Bottom line: NCF enables the LCF to offer competitively priced services in the market place.

8. Revenue Sharing

NCF shares the revenue received from the related Giving Funds with the LCF. Currently, when assets are 5 million dollars or less, 45 percent of the received revenue is allocated to the LCF. That number rises to 65 percent of the received revenue when the assets exceed 30 million dollars. Bottom line: affiliation provides a new revenue source for LCF operations.

9. Transferring Donors

When certain criteria are met, existing NCF donor relationships and their related funds may be transferred to the LCF.

10. Research and Development

We are in an ever-changing and cross-disciplinary industry, impacted constantly by the spiritual vision and leadership of the LCF as well as a multitude of outside factors: the economy, legislation, cultural trends, new technology, natural disasters, and so on. NCF is committed to conducting frequent research of current trends, troubleshooting problems, identifying needs and developing solutions to meet those needs. We expect to continually invest in this area for the combined benefit of the LCF and NCF.

11. Access to Other Organizations

In addition to this array of services offered by NCF, we will offer the LCF the services of supporting organizations that facilitate gifting and limit the liability of the LCF. These organizations include The National Christian Foundation Support, Inc. (NSI); The National Christian Foundation Real Property, Inc. (NCFRP); The National Charitable Christian Foundation Trust, Inc. (NCCF Trust); and the Global Impact Fund (GIF).

NCF also maintains close relationships with Helping Hands, The Gathering, Crown Ministries, Generous Giving and other organizations that can help encourage and equip givers in your ministry. The friends, donors and potential donors of the LCF will greatly benefit from NCF's access to these ministries.

Though not a complete list, we hope the features and benefits outlined above help to demonstrate why we are so enthusiastic about affiliation. Though each community's situation must be evaluated individually for a "fit" with NCF, we hope you will continue to explore affiliating with us. It would be our joy to work with you in service to donors, for the sake of Christ and his glory.

VI. What Next?

We're excited that you're interested in pursuing an affiliation with NCF further. What follows is an outline of the specific actions you and NCF will be taking over the next months.

1. The LCF fills out and submits the LCF application.
2. NCF contacts the LCF; we will pray and conduct initial meetings and try to get to know each other.
3. If it seems like a fit, NCF and the LCF will sign a Letter of Intent which formalizes the exploratory process and provides a level of confidentiality.
4. Depending on the organizational status of the LCF, NCF will provide to you the Affiliation Agreement, LCF Operating Guidelines and any other necessary documents
5. NCF and the LCF sign Affiliation Agreement to formalize the affiliate relationship.

The work of an LCF is a great calling. Its impact can be tremendous. At NCF, we believe in the mission of the LCF, and we will do everything we can to help you succeed. Please contact us if we can be of further assistance.

Contact:

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For Further Reading:

- Scripture passages:
 - Deuteronomy
 - Matthew 6
 - 2 Corinthians 8
 - I Timothy 6
 - James 1, 5

- Books
 - Alcorn, Randy. *The Treasure Principle: Discovering the Secret of Joyful Giving*. Sisters, OR: Multnomah, 2001.
 - Alcorn, Randy. *Money, Possessions & Eternity*. Wheaton, IL: Tyndale House, 1989.
 - Blackaby, Henry and Richard Blackaby. *Spiritual Leadership: Moving People on to God's Agenda*. Nashville, TN: Broadman and Holman, 2001.
 - Blanchard, Ken and S. Truett Cathy. *The Generosity Factor: Discover the Joy of Giving Your Time, Talent, and Treasure*. Grand Rapids, MI: Zondervan, 2002.
 - Blue, Ron and Jodie Berndt. *Generous Living: Finding Contentment through Giving*. Grand Rapids, MI: Zondervan, 1997.
 - Guinness, Os. *Doing Well and Doing Good: Money, Giving, and Caring in a Free Society*. Colorado Springs, CO: NavPress, 2001.
 - Keller, Tim. *Mercy Ministry: The Call of the Jericho Road*
 - MacDonald, Gordon. *Secrets of the Generous Life: Reflections to Awaken the Spirit and Enrich the Soul*. Wheaton, IL: Tyndale House, 2002.
 - Perkins, John. *Beyond Charity: The Call to Christian Community Development*. Grand Rapids, MI: Baker Books, 1993.
 - Pope, J. Gregory. *Gift of a Lifetime: Planned Giving in Congregational Life*. Nashville, TN: Broadman and Holman, 2000.



Local Christian Foundation Application/ Information Sheet

Thank you for your recent interest in the National Christian Foundation's Affiliate Initiative. Please fill out the following application and return it to the address at the bottom of this document. Your application will help us understand where you and others are in the process and will allow us to learn more about your community in general. We look forward to reviewing your application. May God bless you as you explore new opportunities to further His kingdom here on earth.

Please tell us about yourself:

Mr./Mrs./Ms./Dr./Rev.

Name

Title and Organization

Address

City

State

Zip

Phone 1

Phone 2

Fax

Email (separate multiple addresses with a semicolon)

Best way to get in touch with you:

The following questions are meant to give us a general idea of where you are in your thinking and understanding. Please answer to the best of your ability.

How did you hear of NCF?

How long have you been thinking about starting a local Christian foundation (LCF); what got you started?

Please briefly outline your thought process up to this point:

What is your motivation in wanting to start a local Christian foundation?

Please indicate your involvement in the following ministries:

* Crown Financial Ministries

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Generous Giving

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Christian Financial Planners Network

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* The Gathering

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Philanthropy Roundtable

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Christian Stewardship Association

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Christian Management Association

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Christian Foundations Center (formerly the Association of Christian Foundations)

- Knowledge (I've heard of it)
- Participation (I've been involved with it)
- Leadership (I've held leadership roles in it)

* Other involvement:

Please tell us about others who may be involved in the process:

Is there a core group of people dedicated to the concept of an LCF? Please list their names and professional positions:

If applicable, please comment on the makeup of the group interested in starting the LCF. Is there a diversity of skill, talent and resources?

Do you have the collective ability to pursue startup funding for the LCF's operations?

*Next to each area, please rate the collective strength of your “core group” in the following areas
(indicate Undeveloped, Moderate or Very strong)*

* Business knowledge

- Corporations, commercial transactions; real estate transactions, partnerships and limited liability corporations
- Non-profit organizations, board administration, volunteer administration, fundraising/development

*Financial Planning knowledge

- The different disciplines (CPA, life insurance, financial planner, attorney), financial planning services (who offers what) and the process of financial planning (how to create a financial plan)
- Income tax planning and estate tax planning

* Planned Giving knowledge:

- The role of planned giving in a financial plan; basic understanding of charitable gift tools
- Charitable Remainder Unitrust, Charitable Remainder Annuity Trust, Annuities, Wills/trusts, Donor advised Funds, Private Foundations.
- Gifting of Publicly Traded Stock, Closely Held Stock, General Understanding of All Charitable Gift Tools

* Community/Ministry knowledge:

- Community priorities (What are the needs of the community and ministries within the community?) and ministry needs (What are the needs of Ministries?)

Tell us about your community:

- Cohesiveness (Do people have a sense of belonging to the city/region? Is there substantial civic and/or political involvement?)

- Current Population (approximate number)
- Is the population increasing or decreasing?
- Percent Urban
- Percent Suburban
- Percent Rural
- Major Economic Engines
 - * Agriculture
 - * Tourism
 - * Arts and Entertainment
 - * Manufacturing/Industrial
 - * Other
- Wealth distribution (net worth + income)
 - * What Percent greater than \$10 million
 - * What Percent greater than \$1 million
 - * What Percent greater than \$100,000
 - * What Percent greater than \$30,000
 - * What Percent less than or equal to \$30,000

- Median household income:

- Estimated percentage of the population that is Christian:

- How would you describe the Christian population?

- Major churches and ministries located in or around your city:

- Is there anything else we should know about your community? Please tell us here:

Community Spiritual Climate

Please comment on the unity of your community's spiritual leadership:

Are there people praying regularly and specifically for the city?

Are there cross-denominational gatherings and partnerships?

Do ministries, churches and individuals have a "city view"; a sense of the well-being of the community as a whole?

Is there a movement of the Holy Spirit's moving through ministry?

Is there an unprecedented manifestation of the spiritual gift of giving? Is this God's timing of wealth and people?

Do any of the following ministries have a significant presence among Christians in your community?

Please indicate which ones below:

- * Crown Financial Ministries
- * Generous Giving
- * Christian Financial Planner Network
- * The Gathering
- * Philanthropy Roundtable
- * Christian Stewardship Association
- * Christian Management Association
- * Association of Christian Foundations
- * CBMC – Christian Businessman's Committee
- * Leader's Legacy
- * CNT – Christian Network Team
- * FCCI – Fellowship of Companies for Christ International
- * CEO Network
- * Other similar organizations

Please comment on the overall spiritual climate in your community, considering the following facets:

- * Awareness of principles of Christian financial stewardship
- * Attitudes toward wealth and poverty
- * Attitudes toward church, the kingdom of God and non-profit ministry

Financial/Philanthropic Knowledge

- Rate your knowledge/awareness of foundations (public or private) and what they do in the community at large:

* Very aware * Somewhat aware * Less aware * Unaware

- In the local Christian community:

* Very aware * Somewhat aware * Less aware * Unaware

- Please comment on the number and strength of the community of Christian professional advisors (gift planning attorneys, certified public accountants, certified financial advisors, etc.) in your area

- Is there a desire among these advisors to encourage and develop Christian stewardship and charitable giving in their clients?

Once again, thank you for contacting us. Please send this application to the address below. We will review your application and will re-contact you using the information you included above. We look forward to our future correspondence.

David Worland
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