

NAYDO 2024

YOUR CASE FOR SUPPORT: MOVING FROM LEGACY TO VISION



YOUR PRESENTERS

By inspiring hope, generosity and excellence, we empower nonprofits to thrive.



Robyn Furness-Fallin, CFRE

Senior Consultant
DBD Group

What To Expect

1. Learn the behavioral and value characteristics of a planned giving prospect.
2. Consider options for your board to develop a clear vision for the use of future planned gifts.
3. Understand the elements of a donor-focused case to secure a planned gift.
4. Learn the benefits of having a Planned Giving case that has Vision and is donor-focused





A woman with short dark hair, wearing a light-colored button-down shirt and large hoop earrings, is speaking and gesturing with her hands. She is in a modern office setting with glass walls and other people in the foreground. The image has a blue tint.

LEADERSHIP



Get the Board on Board

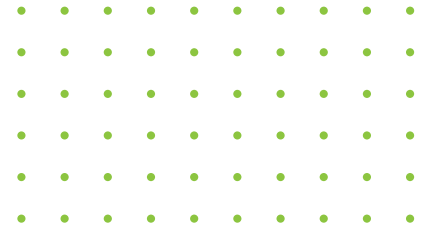
Show the impact of contributed support today AND the potential impact from known future giving

Work together to set goals for long-term major and planned giving growth.

Share the responsibility of cultivation, education and stewardship across board, committees and staff.

Board's first task: set the Vision for Major and Planned gifts

Seek to sustain and expand programs?



Respond to emerging needs?

Ensure long-term organizational stability?

Adapt to changing needs?

Seize new opportunities?

Continue our vital work?

**Initiate programs with assured resources for
sustained support?**



A photograph of two young children, a girl with blonde hair and a boy with dark curly hair, hugging each other in a sun-dappled forest. The girl is wearing a white shirt and the boy is wearing a striped shirt and denim overalls. The background is a lush, green forest with sunlight filtering through the trees.

PROSPECTS



The things we use a lot, that we make a part of our everyday habits, become more valuable to us over time. **This is called the "endowment effect,"** and it brings an unexpected twist to the issue: We love new things, yes, but we also love the familiar — the trusty go-to items that are part of our routines.

CNN newsletter, The Good Stuff



Prospects

Loyal

Tenure

Connected

Believe

Affected

Storyteller/Ambassador

History



Prospects

The Donor's Viewpoint



It's about a donor's beliefs, hopes and dreams.



They are seeking illustrations of real outcomes from past and potential gifts.



Their gift is an investment in the unseen impact on future generations.

PLAN



The Plan



The private support people give to institutions is often referred to as the
“margin of excellence.”

Brian Flahaven, CASE’s Senior Director for Advocacy



A Planned Gift is an Investment in the Community's Future

Seek gifts that are seen as **Focused vs. Specific**, such as:

- Healthy Eating
- Active Living
- Staff Excellence
- Innovative Program Design and Development
- Responsiveness to Community Needs
- Sustainability



The Plan

1

Clarify each revenue source's role for YMCA stakeholders, emphasizing the need for endowment fund raising.

2

Outline the necessity of an endowment for ensuring long-term success for your Y.



THE CASE



“

“The past is written, but the future is left for us to write, and we have powerful tools...openness, optimism, and the spirit of curiosity.”

Jean-Luc Picard, Star Trek Picard Ep. 8





The Goal for The Case



Aiming for sustainability through capacity building and partnerships with donors and their advisors to enable philanthropy.



The case's success is determined by donors engaging with the long-term vision and supporting your organization not just for today but for the future.

The Case >>>



It is not the **annual** case.

Refer to your past by speaking to your **successes**.

Refer to today by sharing your **challenges**.

Refer to your future by sharing your **vision**.

Its role is to strengthen connections leading to **deeper** conversations.

Deeper conversations lead to **meaningful** gifts.



A Good Case Has Focus

What is the issue you are trying to tackle going to look like 10 or 20 years from now?

How is your organization uniquely positioned to take on the challenge –not only today, but also in those future tomorrows?

How can a pipeline of planned gifts give you the room to plan for the future?

A Good Case Has Donor Focus

Builds relationships among donors, families, advisors, and Y's vision

Donors tied to your vision become long-term supporters

Engaging families ensures legacy continuation and potential new donors

Donor focus engages hearts and minds, uniting for a better future

Inspires donors to consider diverse legacy options beyond cash gifts

Communicate the critical role and earned trust as a valuable community asset

Legacy or Vision



In every culture and every nation, heritage represents what one generation passes down to another. On a larger scale, it is the history, customs, and achievements of an entire society. But on a smaller and even more important level, it is the time and love and caring we give to our children. The lessons we teach. The values we share. The encouragement we offer to help a child grow to be strong and confident, wise and accomplished, kind and generous, loving and loved. Our children are our future. And what we give them is their heritage.

Legacy or Vision



Third, the Endowment can act as a rapid-response fund, enabling quick action in the face of local emergencies, whether natural disasters or economic downturns. We can't predict these events, but it's important that the safety net for Iredell County remains strong.

Organization Focus or Donor Focus?



Flexibility and Innovation:

Empower us to adapt to emerging needs and pursue innovative solutions.



Community Impact:

Ensure that our programs and services continue to positively impact the lives of those we serve.

Organization Focus or Donor Focus?



Whatever your life stage, it's important to have a plan that provides for your security and the care of your loved ones. We want you to know there are charitable options that will help you meet your goals, provide future payments, care for your family after you are gone, provide estate tax savings and leave a lifetime legacy.

-Oglethorpe University



Vision And Donor Focus



With the creation of an endowment , you have the chance to build a strong foundation for the Northshore YMCA, now and in the future. Depending on your passion or interest, your endowment, which provides funds in perpetuity, can be focused or wide-ranging.

You can immediately establish an endowment through outright gifts using any type of asset – cash, securities, real estate or other property that can be liquidated.

Vision And Donor Focus



Or you can add gifts to existing endowments such as the Eastman/Rush Endowment Fund and support essential water safety skills that are necessary to keep our youth safe when they are in or around water. Or the Lucas Family Endowment for Youth to provide resources essential to the health and wellness of youth.

If you are thinking about creating an endowment to support a specific purpose, we encourage you (or your advisor) to work with development staff at the YMCA to ensure that your gift will accomplish your goals over time. We can assist you in structuring your gift to provide support that is meaningful for you and has a powerful impact on the development of spirit, mind and body that takes place at the Northshore YMCA.

-Northshore YMCA

A Case With Vision and Donor Focus

Does It Knock Your
Socks Off?



Any Questions?

Learn More

For a copy of
today's
presentation or to
sign up for our
weekly blog



www.dbd.group





Thriving Nonprofits. Thriving Communities

Thank you for joining us!

www.dbd.group

