

2025 Development Day Conference
Planned Giving Roundtable of Southeast Michigan
Your Case For Support: Moving From Legacy To Vision

Small Group Case Study Activity

Urban Roots Collective

Mission Statement

To transform urban food deserts into thriving, sustainable community food ecosystems that promote health, education, and economic empowerment.

Primary Program Areas

- Community Urban Farming Initiatives
- Nutritional Education Workshops
- Food Access and Distribution Program
- Youth Agricultural Leadership Development

Existing Donor Base

- Local business sponsors
- Community philanthropists
- Urban agriculture enthusiasts
- Health and wellness foundations
- Corporate social responsibility programs

Current Financial Resources

- Annual Budget: \$750,000
- Funding Sources:
 - Grants: 45% (\$337,500)
 - Individual Donations: 30% (\$225,000)
 - Corporate Sponsorships: 15% (\$112,500)
 - Program Revenue: 10% (\$75,000)

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Bridges of Hope Mental Health Support

Mission Statement

To provide comprehensive mental health support, reduce stigma, and create accessible, culturally responsive mental wellness resources for underserved communities.

Primary Program Areas

- Community Counseling Services
- Mental Health Awareness Campaigns
- Peer Support Network
- Cultural Competency Training
- Crisis Intervention Programs

Existing Donor Base

- Healthcare professionals
- Mental health advocates
- Community health foundations
- Local government mental health initiatives
- Technology companies with wellness programs

Current Financial Resources

- Annual Budget: \$1,200,000
- Funding Sources:
 - Government Grants: 40% (\$480,000)
 - Private Foundations: 25% (\$300,000)
 - Individual Donations: 20% (\$240,000)
 - Corporate Partnerships: 15% (\$180,000)

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Global Education Horizons

Mission Statement

To provide high-quality, technology-enabled educational opportunities for children in remote and economically disadvantaged regions worldwide.

Primary Program Areas

- Digital Learning Platforms
- Teacher Training and Support
- Technology Infrastructure Development
- Scholarship and Educational Access Programs
- STEM Education Initiatives

Existing Donor Base

- Technology companies
- International development organizations
- Educational technology philanthropists
- Global education foundations
- University partnerships

Current Financial Resources

- Annual Budget: \$2,500,000
- Funding Sources:
 - International Grants: 50% (\$1,250,000)
 - Technology Company Donations: 20% (\$500,000)
 - Individual Major Donors: 15% (\$375,000)
 - Multilateral Organization Support: 15% (\$375,000)

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Resilient Ecosystems Alliance

Mission Statement

To protect and restore critical ecosystems, support biodiversity conservation, and develop sustainable environmental solutions through research, education, and community engagement.

Primary Program Areas

- Habitat Restoration Projects
- Wildlife Conservation Research
- Climate Change Adaptation Strategies
- Environmental Education
- Community-Based Conservation Initiatives

Existing Donor Base

- Environmental conservation foundations
- Ecological research institutions
- Wildlife preservation enthusiasts
- Sustainable tourism organizations
- Corporate environmental responsibility programs

Current Financial Resources

- Annual Budget: \$1,800,000
- Funding Sources:
 - Environmental Grants: 35% (\$630,000)
 - Major Philanthropic Donors: 25% (\$450,000)
 - Research Partnerships: 20% (\$360,000)
 - Corporate Sponsorships: 15% (\$270,000)
 - Membership Contributions: 5% (\$90,000)

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Discussion Questions

Section 1: Future Landscape Exploration

1. Future Scenario Mapping
 - What critical challenges will this cause face in 10-20 years?
 - What emerging trends might significantly impact their mission?

Section 2: Organizational Positioning

1. Unique Organizational Strengths
 - What makes this organization distinctively capable of addressing future challenges?
 - What current capabilities can be leveraged or transformed?
 - What strategic pivots might be necessary?

Section 3: Planned Giving Strategy

1. Gift Pipeline Strategy
 - How can planned gifts provide financial flexibility?
 - What types of planned gifts align with their long-term vision?
 - How can these gifts support strategic initiatives beyond immediate programming?

Presentation Guidelines

- Be prepared to articulate:
 - Key future challenges
 - This organization's unique positioning
 - How planned giving supports their strategic vision

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Small Group Donor Focus Messaging Activity

Nonprofit Organization Profile: Green Horizon Institute

Mission Statement

Green Horizon Institute is dedicated to transforming urban ecosystems through innovative environmental education, sustainable community development, and climate resilience solutions.

Organizational Background

Founded in 2010, Green Horizon Institute has emerged as a leading voice in urban sustainability, working at the intersection of environmental science, community empowerment, and climate adaptation.

Current Program Areas

1. Urban Green Space Restoration
2. Climate Literacy Education
3. Community Resilience Initiatives
4. Youth Environmental Leadership Development

Vision for the Future (2025-2045)

Strategic Long-Term Goals

- Develop a comprehensive urban sustainability model that can be replicated in 50 major cities by 2040
- Create a network of 100 urban sustainability centers across North America
- Train and empower 10,000 youth environmental leaders
- Reduce urban carbon footprint by 40% in target communities

Emerging Focus Areas

- Advanced climate adaptation technologies
- Intergenerational environmental knowledge transfer
- Urban biodiversity preservation
- Community-driven ecological restoration

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Small Group Donor Focus Messaging Activity

Potential Donor Profile: Margaret Chen

Personal Background

- Age: 62
- Profession: Retired Environmental Engineering Professor
- Personal Interests:
 - Urban sustainability
 - Environmental education
 - Mentoring young scientists
 - Community development

Philanthropic Profile

- Consistent donor to environmental causes
- Passionate about knowledge transfer
- Values long-term, systemic approach to environmental challenges
- Interested in leaving a lasting legacy

Potential Connection Points

- Academic background in environmental engineering
- Desire to support future generations
- Commitment to sustainable urban development
- Personal experience with environmental change

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Small Group Donor Focus Messaging Activity

Key Messaging Objectives

1. Emotional Engagement Message

- Must inspire hope
- Demonstrate tangible human impact
- Connect personal passion to broader change

2. Organizational Credibility Message

- Highlight proven track record
- Demonstrate strategic approach
- Provide transparent impact metrics
- Show fiscal responsibility

3. Vision Alignment Message

- Illustrate long-term potential
- Create sense of continued purpose
- Provide pathway for ongoing involvement
- Show how donor's legacy continues

Reflective Questions for Messaging Development

- How does our work transform individual lives?
- What makes our approach uniquely effective?
- How can we make our vision feel personally relevant?
- What lasting change can we create together?

Potential Planned Giving Approaches

- Endowed scholarship programs
- Sustainable urban development fund
- Youth leadership development initiative
- Long-term research and innovation grant