

THE ACADEMY

Created for the YMCA
By DBD Group

MAJOR GIFTS & PLANNED GIVING



SECURING A FINANCIAL FOUNDATION

The Major Gifts & Planned Giving Academy is designed to help Y leaders to develop an intentional major and planned giving program. A secure financial foundation is critical for nonprofit sustainability and organizations with strong donor relations, healthy reserves, and endowment funds have more flexibility to meet future needs. Major and planned gifts have helped nonprofits retain staff, adjust programming, retool facilities and continue important work regardless of the changing environment.

The Major Gifts & Planned Giving Academy will help local Ys re-think the way to develop and grow major and planned giving revenue annually. This includes potential repositioning of resources (time, people and dollars) to focus on simple, consistent actions that will help identify, engage, and invite donors to make significant and/or legacy gifts. **Through this program, local leaders can have a generational impact on their Y, and, more importantly, on the people they serve.**

EACH PARTICIPATING Y RECEIVES:



Customizable, twelve-month step-by-step **major gifts and planned giving development guide**.



Support to identify top prospects and determine appropriate **cultivation strategies and tactics**.



Access to an **online learning** platform containing **tools, customizable resources, and samples**.



Participants can access **on their own time, at their own pace**. All content is sharable with other staff and volunteers, making this an **Association-wide resource**.



Professional **development forums** with expert guests. Sessions are recorded for those who want to watch later or again.



Facilitated **participant community**, connecting Ys across the country to network, share ideas and resources.



IS THE MAJOR GIFTS & PLANNED GIVING ACADEMY RIGHT FOR YOU?

THIS ACADEMY IS THE RIGHT OPPORTUNITY FOR YOU AND YOUR Y IF SOME OF THE FOLLOWING APPLY:

- Received at least one (1) bequest gift within the previous five (5) years (requirement)
- Prepares an annual/impact report and/or distributes a newsletter regularly (requirement)
- Have established a committee of the Board of Directors responsible for philanthropic activity
- Collects emails from donors
- Giving/Donate landing page on your website
- Active on at least one social media site

YOUR YMCA CAN SEGMENT ITS DATABASE INTO LISTS FOR EACH OF THE FOLLOWING:

- Staff
- Board
- Legacy Society/existing legacy donors
- Donors
- Non-leadership Volunteers
- Members
- Program participants
- Event attendees
- Friends

Additionally: Participants will be required to hold a contract with Crescendo, DBD Group trusted partner, industry leader and largest provider of gift planning and blended gifts marketing solutions to access curated donor. Ys will be provided a recommendation on timing to activate a Crescendo partnership following the onboarding process for this Academy.



PARTICIPATION: Interested Associations must submit the candidate form below, which will be reviewed by Hubs and Alliances. Up to 100 YMCAs will be selected to participate in the program in 2023. YMCAs selected to participate can engage as many individual participants from their organization as appropriate. The first cohort is underway, but your submission will go on a waitlist and be considered for future cohorts.

FORM: https://yusa.formstack.com/forms/resource_development_academies
CFRE credits are available for successful completion of the course.