



Endowment Horizons

Planned Giving for a Strong Today, Tomorrow and Forever

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FOUR PILLARS OF A SUCCESSFUL PROGRAM

COMMITMENT
DISCIPLINE
PLAN

involvement
education
selection
recognition

KNOWLEDGE



SUCCESSFUL PLANNED GIVING PROGRAMS

SOLID LEADERSHIP
STRONG HISTORY
FINANCIALLY SOUND
DREAMS FOR FUTURE
LOYAL SUPPORTERS



THE COMPONENTS OF A PLANNED GIVING PROGRAM

STAFF
VOLUNTEERS
LOYAL SUPPORTERS



ONLINE PROGRAM ELEMENTS

INITIAL CONSULTATION

EDUCATIONAL WEBINAR

INDIVIDUALIZED COACHING

PEER TO PEER SESSIONS



Endowment Horizons

Planned Giving for a Strong Today, Tomorrow and Forever

Our value comes from experienced specialists managing relationships and applying unique gifting programs to create breakthrough results.

OVERVIEW

The New Program is **designed to guide and support nonprofit organizations as they revive, enhance, or begin building strong planned giving programs** that will ultimately provide stable, current and long-term support for their critical work in the community.

The program is **designed to provide nonprofit organizations with a cost-effective training and coaching program** in planned giving for annual, special projects, capital, and endowment building efforts. Each organization will receive a customized plan to help you reach your goals. No matter what they are. All prospective organizations will receive a complimentary discovery call to discuss your situation and see if this program fits you.

As planned giving professionals with over 25 years of experience, we offer each organization in the Kickstart program:



SIX –TRAINING WEBINAR SESSIONS (ONCE EVERY OTHER MONTH)

TRAINING SESSIONS

The participating organizations are invited to six (6) training sessions. Each session length is 1 hour in length may extend an additional 30 minutes if needed. Each organization is encouraged to have both staff and board/committee members join the webinars. Webinars will be recorded for those unable to join or as a reference in team meetings.

The training sessions are **facilitated by experienced planned giving specialists and endowment building program consultants.**

SESSION TOPICS

The sessions **focus on three significant areas: external relationships (development and marketing), internal systems / organizational structure, and leadership.**

Topics covered include:

- Planned Giving overview – it's not fundraising
- How Planned giving supports annual, special projects, capital and endowment building efforts
- Infrastructure for endowment building – Equipping your organization to build an endowment
- Long-range/budget planning
- Board / Committee leadership – recruiting and engaging the Boards and Committees
- Donor development and solicitation – Working with existing and identifying candidates
- Tools and Resources for your success
- Marketing

Session Elements

Each session includes the following elements:

- Topic presentation
- Time for questions and answers
- Handouts – schedule, copy of the PowerPoint presentation, articles, and valuable tips
- Sample materials
- Next Steps - Each participant will leave with one or two items or ideas that they can implement.



SIX – 1-HOUR COACHING WEBINAR SESSIONS (OPPOSITE MONTHS FROM TRAININGS)

Coaching

One of the most effective ways to help staff and board members implement what they have learned after a training session is to **provide follow-up and technical assistance through coaching.** The consultant can be a sounding board for ideas, review plans and materials, and guide the next steps. These sessions provide each organization an opportunity to customize a program to meet its goals. **Each organization will receive a coaching webinar between training sessions.**

TWELVE BI-MONTHLY WEBINAR SESSIONS TO SHARE SUCCESSES AND CHALLENGES (PEER GROUP WEBINARS)

Peer Group Sessions

Sharing successes and challenges allow organization staff and volunteers an opportunity to hear what others are experiencing and ask questions through chats or live. Two one (1) hour peer-group webinars are offered each month led by the specialist.

DAILY SUPPORT AS QUESTIONS OCCUR

After the first year as an apprentice, you are invited to continue with the Peer Group webinars as a developed organization or continue at the apprentice level. Options will be discussed mid-year for planning purposes

Fee for Participation

The goal is to provide a cost-effective program to engage in fund development areas that traditionally can be expensive and difficult to implement. As a result, the program fee for each participating organization is \$6000 for the year. This fee would cover participation in the training sessions, coaching sessions, peer groups sessions, and program materials. Each organization is welcome to invite as many staff, board, and committee members who may benefit from any training sessions to join us.



THANK YOU

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