

Is Your Organization Right for the Legacy Partnership Program?

If you are a nonprofit organization in the Greater Dayton Region that is on a sound financial footing and where the commitment exists on the CEO and board levels to pursue a permanent program to grow your endowment, your organization may be right for this program.

You need to be able to identify between 80 and 120 individuals who are strongly committed to your organization and who may be legacy gift candidates. You also need to be willing to start a Legacy Society to recognize and cultivate legacy donors to your organization and be able to cost-share the modest expense of this program with The Dayton Foundation.

What Your Commitment Would Be

- Nine to twelve days per year for direct development work, planning, follow-up, etc.
- Minimum four-year commitment with the intention of making endowment building a permanent part of your development culture
- Modest cost-sharing expense

How You Can Enroll or Learn More

It's as simple as a phone call. Telephone Joe Baldasare, Vice President of Development for The Dayton Foundation, at (937) 225-9954. You also may e-mail him at jbaldasare@daytonfoundation.org.

He will be glad to sit down with you and help you to determine if this program is right for your organization.



THE DAYTON
FOUNDATION

We're here for good.

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For a listing of The Dayton Foundation's Governing Board members and staff, visit our web site or give us a call.



Meeting All Standards for
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We help you help others.SM

For Forward-Thinking
Nonprofit Organizations

Grow Your Organization's Endowment & Create a Proactive Legacy Gift Program



We're here for good.

Legacy Partnership ProgramSM

A partnership between nonprofits in the Greater Dayton Region and The Dayton Foundation

Fostering the long-term stability of local charitable organizations through strong legacy gift programs

*Since 1921,
helping people
to help others.*

Legacy Partnership ProgramSM

The Dayton Foundation's Legacy Partnership Program helps you achieve results with your legacy gift program by providing you with the following.

- Expertise
- Consistency
- Direction
- Support
- Structure

A Program That Works for You

If you've recognized the need for a legacy gift program, but you lack the time and/or the staff expertise to do it, the Legacy Partnership Program may be right for you.

Dozens of nonprofit organizations in the Greater Dayton Region have entered The Dayton Foundation's Legacy Partnership Program to build their endowments through a planned and deferred giving program.

Some wanted to start a legacy program; others wanted to invigorate an existing or dormant program. All recognized that to sustain their organizations in the future, an active legacy gift program to build their endowments was essential.

The Legacy Partnership Program is set up to help your nonprofit:



"The Legacy Partnership Program has given us another way to deepen our relationship with key community leaders. They now have a greater connection between their contributions and the people we serve. Knowing that this program ensures Red Cross assistance into the future cements this special bond."

– Tom Fodor, CEO, American Red Cross, Dayton Area Chapter

- secure significant legacy gift commitments within four to five years,
- provide a long-term, consistent emphasis on endowment building that is self-perpetuating, regardless of board and staff turnover within your organization and
- cultivate relationships that may lead to current gifts.

Through the Program, The Dayton Foundation is able to:

- effectively respond to the request for this type of assistance from our nonprofit partners and
- begin to reverse the trend in the past two decades that has resulted in a 16 percent drop in the number of surveyed nonprofits with endowment funds.

We believe that there is no more important work for The Dayton Foundation than to help assure that nonprofits in the Greater Dayton Region like yours will be here in the future. We believe that the best way to ensure this is through endowment building – and that the most promising method today to accomplish this is through planned and deferred giving.

How the Program Benefits Your Organization

- Provides a structure and discipline to assure your organization has allocated time to devote to endowment building
- Teaches you an approach with a proven track record to securing legacy gifts for your organization
- Provides support for your endowment-building efforts
- Often leads to an increase in annual giving, volunteerism and in-kind gifts
- Gives you access to The Dayton Foundation's services and development staff with planned and deferred giving knowledge and experience



"The Dayton Urban League's participation in the Legacy Partnership Program has created extraordinary opportunities for donors to preserve the League's future through planned giving."

"A longtime supporter of the League, who rarely contributed more than \$50 a year, gladly committed a significant financial contribution to the League's Legacy Society and increased her annual giving sixfold after hearing about the program. This would not have been possible without this partnership."

– William Gillispie, Interim President & CEO, Dayton Urban League

- Provides your organization with an affiliation with The Dayton Foundation as an effective and respected steward of charitable funds
- Connects potential donors to your organization's web site via a link on The Dayton Foundation's site
- Helps you grow your organization's resources for the future



"The Legacy Partnership Program has helped us to focus on planned giving, providing us with the motivation and expertise necessary for us to move our program forward."

"It has helped us secure significant gifts for the benefit of Aullwood Audubon Center and Farm."

– Charity Krueger, Executive Director, Aullwood Audubon Center and Farm