





## The Life of a Legacy Match: Turning Inspiration Into Action

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New York University

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## The Life Of A Legacy Match: How To Ignite Donor Generosity



NYU TURNED \$500K OF UNDESIGNATED ESTATE FUNDS INTO \$68M IN FUTURE BEQUEST DOLLARS – YOU CAN TOO!

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## Ready For It?

Like a radio station giving away free concert tickets, or bobblehead day at the ballpark, a Legacy Match program serves as a great incentive to encourage donors to document their legacy gifts.



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# Backstage in . . . The Life Of A Legacy Match

Insider Secrets!

- Concept
- Launch
- Execution

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# Be Fearless

Get Leadership Buy-in

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# Get Your Ducks In A Row

- Present a compelling case



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### Get Your Ducks In A Row

- Low Cost
- High Return
- If necessary, propose a Pilot or a Sprint Match to test the waters



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### Mastermind Strategy - C.A.S.E.

Show Leadership that the water is:

- Not too deep
- Not too cold
- They won't be the only one in the pool



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### Gold Rush - for Staff & Donors

- Staff - Mine portfolios for gems
- Donors - Stake their claim to a Match



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## The Procrastinator's Bonus



- Donors Respond
- Overcoming Inertia
- **80%** of planned gifts are revocable bequests
- **100%** new future dollars that likely wouldn't have been documented without the match!

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## Rules:

- What types of Planned Gifts will count? **ALL (except CGAs)**
- What matching percentage will be applied? **10%**
- What is the "cap" on matching funds allocated? **\$10,000**
- Will documented gifts be counted at face value or discounted value? **Face Value**
- Can matching funds be directed to create a new named fund? **No**

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## Potential Return on Investment

Matching Funds	Expected Amount Raised	Actual Amount Raised
\$336,094	\$3,360,094	\$11,195,069 33:1 Return Rate

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### NYU: What We Modeled for Leadership

Matching Funds	Expected Amount Raised	Potential Amount Raised
\$500,000	\$5,000,000 10:1 Return Rate	\$15,000,000 30:1 Return Rate

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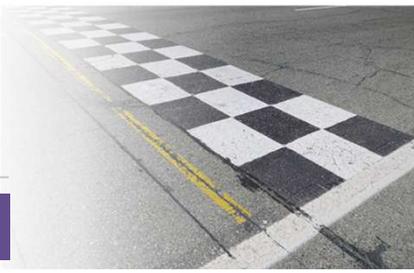
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### Roadblock

Rewrite the Script – find new funding source



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### Got Creative

Found funding from an unexpected source



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## Invisible String

Senior Leadership Loved the Legacy Match idea, and . . .

The alternative source of funding!

Thanks to a little creativity we found the *invisible string* that tied an actual Legacy Donor to our Legacy Match



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## Box Office Results

\$500,000 to \$68,000,000

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## Implementation

How we got to our Standing Ovation

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### Motivate Donors Along the Giving Continuum

Have planned gifts but have not documented them with your charity	Long-time donor took action - motivated by matching funds	Motivated by the rush of a deadline
CAS	IFA	Tisch

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### Traffic Management

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### Communication Flow

Transparency and strong communication was key. NYU Fiscal officers were a key piece of the puzzle.

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## The Free T-Shirt of Planned Giving

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## Coaching

- Whether for a sports team, performer, or a fundraiser
- Coaching requires you to step into the shoes of both the performer and the frontline fundraisers

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## Listen

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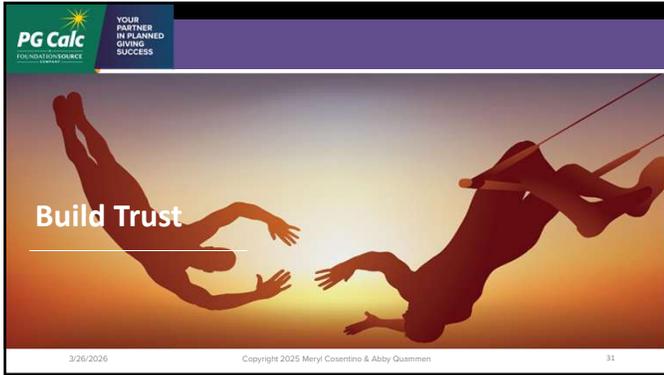
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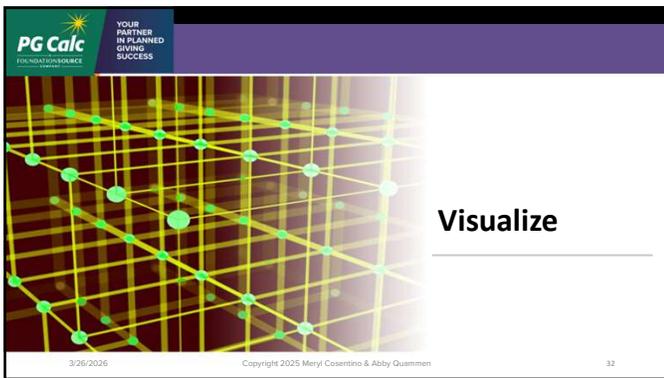
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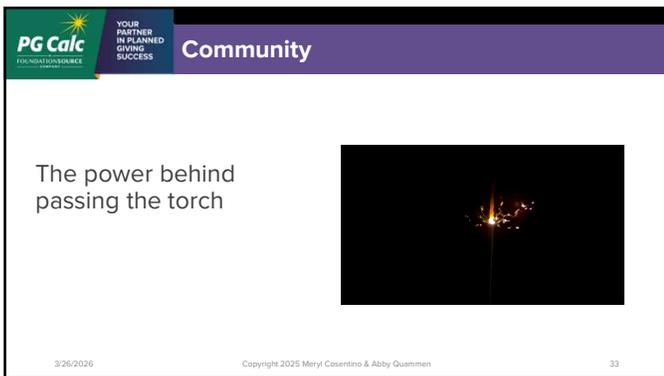
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# Training

A Key Component

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## Shake It Off

Common Donor Objections and how to Overcome them



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## Created an in-house Training Program

- Regular Check-ins
- Staff Collaboration
- Role-playing exercises
- Ongoing support from experienced Gift Planning staff
- As well as Scripts for donor objections & FAQs
- And of course, we celebrated wins at all-staff meetings which kept the energy high all year long



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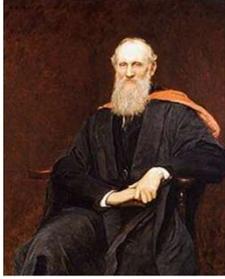
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**To Measure is to Know**

~Lord Kelvin,  
Scottish-Irish Physicist



- We measured
- Now we know!

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**Past Performance Does Not Guarantee Future Results**

Expected	Actual	Future
\$5 Million	\$68 Million	Be sure to temper future expectations

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**After Measuring, We Know...**

Collaborative Bequests: 300% Increase

Donor Visits: 37.6% Increase

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## Our Operational Backbone

The Legacy Match Tracker

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## Keeping Motivation High

Gamification!

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## March Madness

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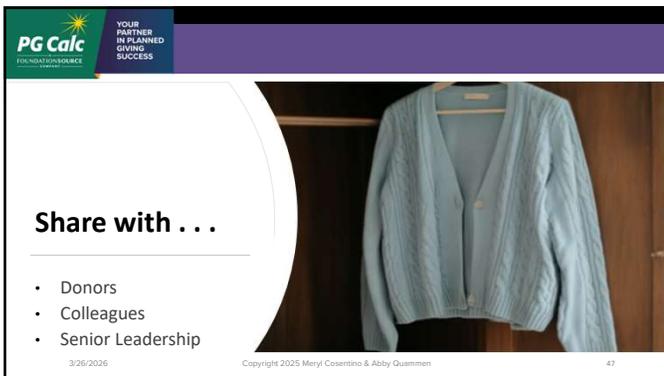
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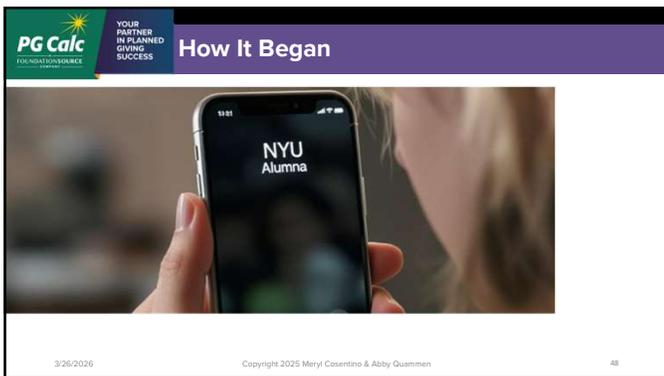
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## Coffee & Conversation

- Bond Grew
- 100% TOD - \$1.6M
- Home renovation
- Searching for Estate Attorney
- Unexpected loss of her daughter
- All along . . . holding onto one of our 50 Matches



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- Fund a Student
- Attend Scholarship Luncheon
- Meet Student Recipient

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## A Cherished Thank You

Meryl,

I had to wait a bit to express my gratitude for your kind gesture on behalf of the university. I cried a lot yesterday because I was so touched.

I so appreciate what you did for me as you have gone above and beyond what anyone else might have done for a donor. It's been a crushing year, but I know that next year will be better thanks to you.

With great affection,



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## Power of Human Connection

Beyond the Numbers: The \$10,000 match was a mere fraction of the \$3.5M Legacy

↓

Profound Connection

↓

Unexpected New Chapter: Unexpected inheritance will be basis of a second gift to honor donor's daughter

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## True Cost of Legacy Match

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## Bagel Brunches for staff trainings

- \$500



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### Estate Funds Invested

- \$500,000



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### Future dollars raised:

- \$68 Million



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### Staff that is ready to inspire record-breaking campaign success

- Priceless



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**Begin Again** Next campaign. Can't give all the details but we will share some easter eggs.

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**Questions?**

Click the Q&A icon at the bottom of your screen.

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**Still Have a Question?**

**Contact:** Meryl Cosentino  
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 cosentino@martsandlund.com

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**E-mail:** aq2117@nyu.edu  
 crownedbyqcoaching@gmail.com

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