

Have your values—



And eat, too

Community-Centric Fundraising & *planned giving psychology*

chantelle ohrling



- curious & nerdy
- bookworm
- use a lot of nature based extended metaphors
- supported by incredible mentors




Tkaronto is the traditional territory of many nations including the Mississaugas of the Credit, the Anishnabeg, the Chippewa, the Haudenosaunee and the Wendat peoples.

Tkaronto is covered by Treaty 13 signed with the Mississaugas of the Credit, and the Williams Treaties signed with multiple Mississaugas and Chippewa bands.

- **1142:** Great Law of Peace ‘Gayanesshagowa’
- The Mohawk, Oneida, Cayuga, Seneca, and Onondaga and later the Tuscarora joined the confederacy.
- “Within Grand Council meet the Chiefs of each nation which then divide into sections of Elder Brothers and Younger Brothers”
- Clan Mothers serve for life, have been selected by consensus, and have the authority to remove council members.

our time together today...

- 1. Why Community-Centric Fundraising matters to estate planning professionals**
- 2. CCF 10 principles reflection**
- 3. Five planned giving psychology tactics**
- 4. Real examples of copy**
- 5. Questions**

An illustration of four diverse women in a community setting. The women are depicted in a stylized, colorful manner. One woman on the left is wearing a pink top and a white headscarf. The woman in the center is wearing a green top and a yellow headscarf. The woman on the right is wearing a red top and a yellow headscarf. The woman at the bottom is wearing a blue top and a yellow headscarf. They are gathered around a table, and one woman is holding a yellow object, possibly a fruit or a small gift. The background features a stylized building and a flower. The text "Why Community-Centric Fundraising?" is overlaid on the illustration in a bold, black font.

Why Community-Centric Fundraising?



UPCOMING WEBINAR

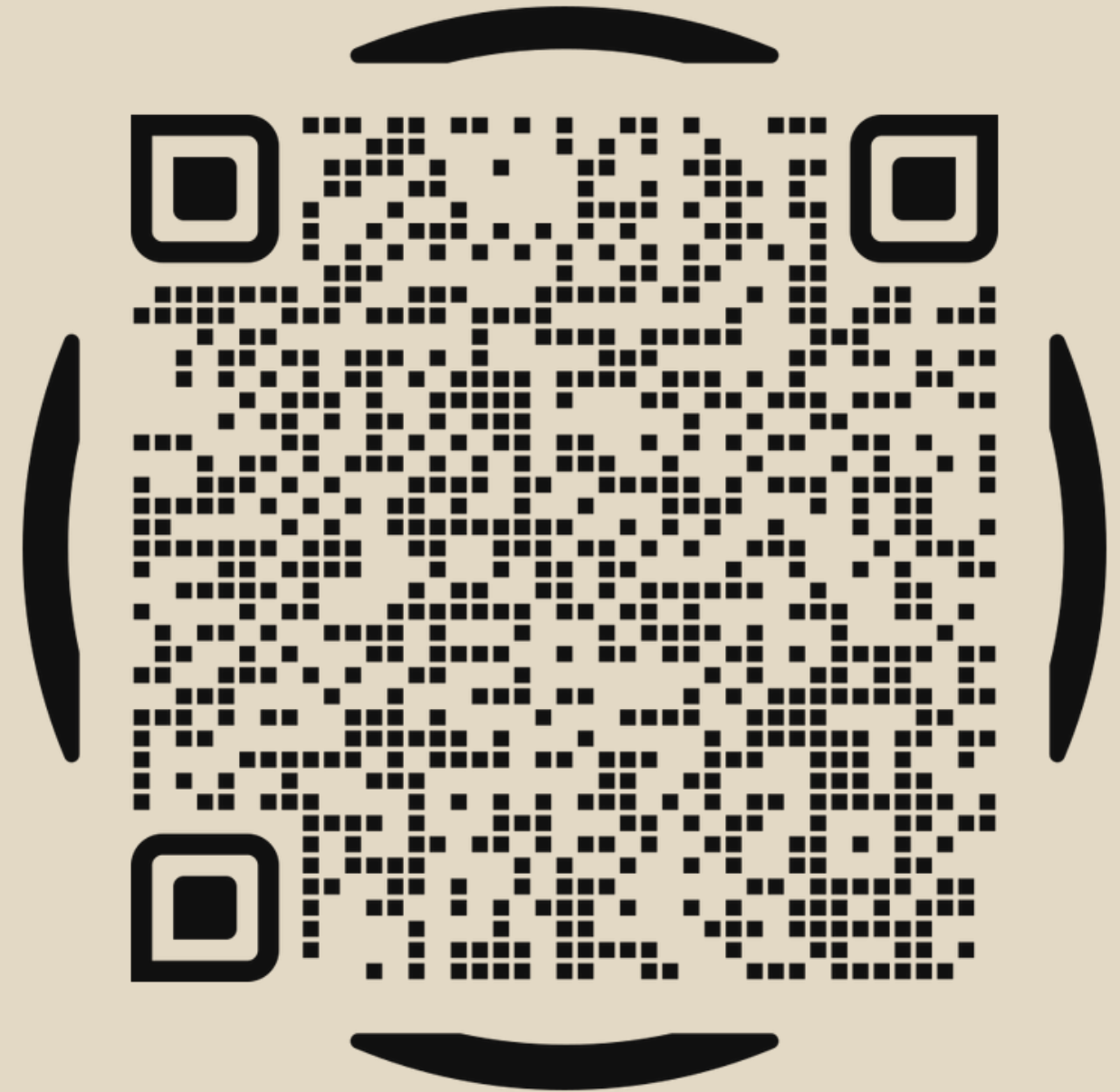
Even in Death They Control Us – Wills, Estates, and Indian Act Paternalism



Zachary Biech, BA (Hons), JD
Principal, Barrister & Solicitor, Biech Law



 11:00AM PST  JUNE 18  Members \$0,
Non-members \$20



Community-Centric Fundraising 10 Principles

**&
*collective
self reflection***



1. Fundraising must be grounded in race, equity, and social justice.

2. Individual organizational missions are not as important as the collective community.

3. Nonprofits are generous with and mutually supportive of one another.

4. All who engage in strengthening the community are equally valued, whether volunteer, staff, donor, or board member.

5. Time is valued equally as money.

6. We treat donors as partners, and this means that we are transparent, and occasionally have difficult conversations.

**7. We foster a sense of belonging,
not othering.**

8. We promote the understanding that everyone (donors, staff, funders, board members, volunteers) personally benefits from engaging in the work of social justice – it's not just charity and compassion.

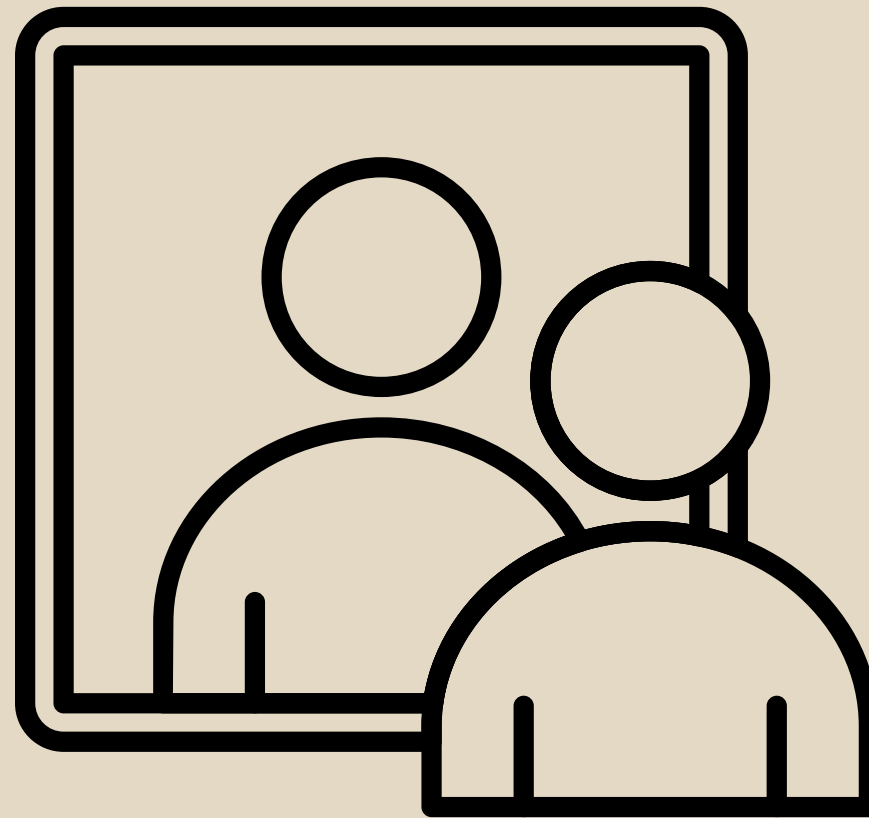
9. We see the work of social justice as holistic and transformative, not transactional.

10. We recognize that healing and liberation requires a commitment to economic justice.

5 psychological tactics for planned giving:

- Autobiographical mindset
- Improving psychological well being
- Moral identity
- Social norms
- Future vs here & now

Autobiographical mindset



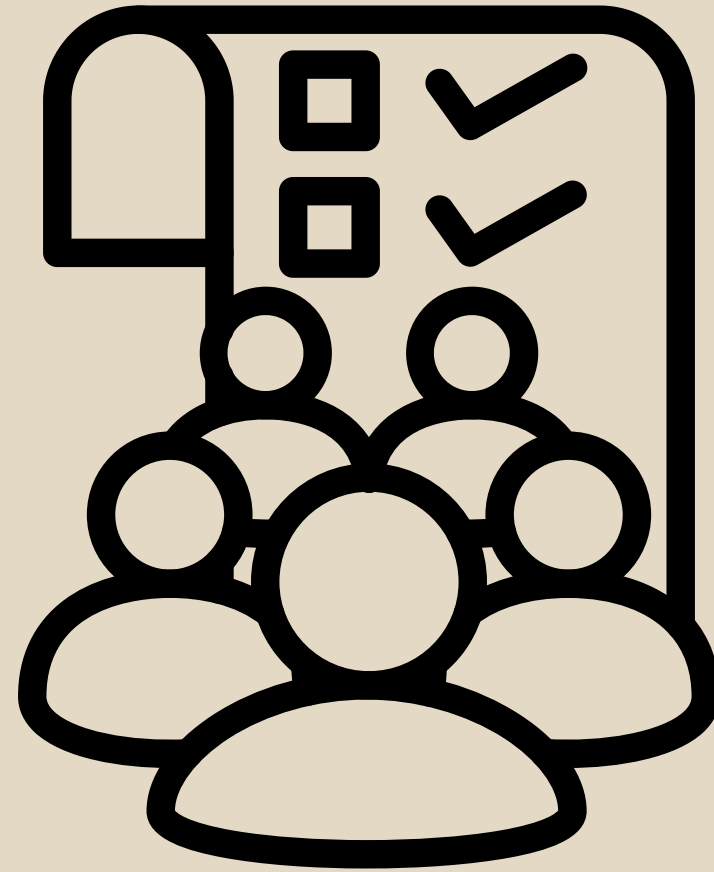
Improving psychological well being



Moral identity



Social norms



Future vs here & now



Examples in action...

Leave a loving gift in your will

Loving animals is who you are. You can be there for them, always, with a loving gift in your will to The BC SPCA. Your caring legacy will create a kinder future for the animals as we work towards creating a world that is free from animal cruelty.

Thinking about writing a will can be overwhelming – but it is the kind and thoughtful thing to do for your loved ones, both two and four legged.

What it means to become a caring Forever Guardian

When you become a Forever Guardian, you'll join a special group of animal lovers who are there for whatever the animals may need in the future. We don't always know how animals will need us in the future, but we do know that we need to be ready. Your loving gift will be there for the animals, providing support for the lifesaving work we do every day as well as building a foundation for a brighter future.

Ecojustice began with a car, a cause, and the fierce resolve you share.

In 1990, moved by the same conviction you carry today, two environmentalists planted a seed of hope — working out of the back of a car in response to the Exxon Valdez disaster.

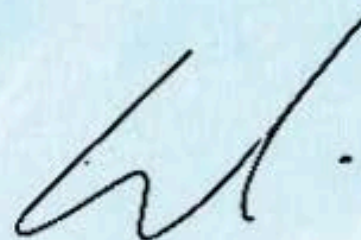
Thanks to the support of passionately caring Canadians like yourself, that seed has grown into what is now known as Ecojustice. Together, we have been fighting for a greener, healthier planet for over 35 years and have been involved in two-thirds of all environmental law cases heard by the Supreme Court of Canada. Our victories are the result of legal expertise and collective action coming together to end the greed of corporations and governments that threaten awe-inspiring ecosystems from coast to coast to coast. Every single gift left to Ecojustice in a will, regardless of size, has added hours of critical legal expertise to represent environmental groups, Indigenous communities, grassroots activists, and everyday people in Canada.

In 2014, our supporters enabled us to join with Indigenous leaders and activists to argue against the

mining expansion projects before they begin, and with the support of dedicated environmentalists like you, it won't be the last.

As climate disasters and extreme weather become more frequent, now more than ever, your support is needed to defend the health of our environment. Together, we will continue to take bold action to preserve the environment and climate for generations to come.

Thank you for considering a gift in your will to Ecojustice. You would be joining me and other fierce environmentalists who have planted seeds of hope that will one day emerge defiantly from the earth, like saplings, to shape the future landscape of environmental protection.

A handwritten signature in black ink, appearing to be the initials 'W.L.' followed by a period.

Imagine leaving a legacy that continues your life's work of protecting the environment. That is exactly what Shirley Samples, a proud new grandmother, is doing by leaving a gift in her will to Ecojustice.

Ecojustice uses the power of the law to fight for nature and healthy communities and, as Shirley says, we “choose cases that can set precedents, which is what we need! We need laws to change so that biodiversity is as important as the bottom line.”

Shirley is a passionate woman whose life is a testament of how one fiercely caring person can make a huge impact — especially when it comes to protecting the natural world. It's only fitting that she is joining the many passionately caring Canadians who are leaving a gift in their will to Ecojustice. After moving to Roberts Creek, a place of stunning natural beauty that instantly captivated her, Shirley discovered that a stream near



Shirley in front of Roberts Creek, one of the creeks that the Sunshine Coast Streamkeepers Society maintains and monitors.

Shirley first heard about Ecojustice when she was an activist fighting the Kinder Morgan pipeline, which she opposed because of the devastating risks it posed to the Salish Sea, particularly the orcas. She kept up with court proceedings as Ecojustice was actively fighting the project in court. Shirley knows that Ecojustice will continue

Questions?