LEGACY PLAN GUIDE

The questions provided are intended to serve as a guide to help your Legacy Team discuss the different aspects of the plan and decide what will work for your specific organization.

Please put your legacy plan in narrative and/or bulleted format and submit as a Word document. Please do not just respond to the questions. Thank you!

Case Statement

Your case statement is different from most things you are asked to write. It is not a recruitment tool, but rather a reminder, to your most loyal donors, of the difference you make in their life and the life of your community. It focuses on the future and not on your current needs.

In addition to being the introduction to your Legacy plan, it is intended to be used as a stand-alone piece to share with the individuals you will be having legacy conversations with and to provide language for other marketing materials.

Please keep your case statement to one page, write in an ***active tense***, and print in an easily readable font.

Your case statement should motivate and inspire members of your community to make a legacy commitment. It should be ***positive, forward***--***looking*** and ***confident***. It should articulate why your organization must continue to flourish as an essential community resource now and for future generations.

Your case statement should describe the emotional connection donors have to your organization, focusing on **why** donors are devoted to you. It should invite donors to be part of your legacy society and clearly articulate the impact legacy gifts will have on those you serve.

Before you begin writing, we suggest that your legacy team share with each other why you have chosen to give your time, energy and financial resources to your organization and the important role it plays in your life. You may want to ask others involved with your organization these questions as well. These conversations will help you develop the appropriate language and feelings to convey in the case statement.

Your case statement will have four parts:

1) Who you are and the role you play in the community
2) Your core values and how they are expressed
3) A statement that identifies who your legacy donors are i.e.: Our legacy donors are people just like you who believe/want….
4) Call to join/be part of this special group of people

To draft your case statement, consider the following questions:

- What impact has your organization had to date on you personally, in the community, the Jewish world and beyond (if applicable)?
- What are your organization's core values and what is the impact of these values on your constituents. How are they expressed?
- What is unique about what you provide/offer?
- What are your organization's future aspirations?
- What impact will legacy gifts have on those you serve?

When drafting your case statement make sure to:

- Write in active voice. You do not 'seek to educate' or 'hope to engage', etc.
- Use descriptive words to talk about the impact your organization has on its constituents.
- Share the values that motivate the organization's work.
- Shares the 'story' of your organization, why is your organization unique and needed in the community.
- Provoke the reader's emotions. Make them remember why the organization is special to them.
- Focus on what the organization has to offer future generations

Before submitting make sure you haven't:

- Presented a detailed history of your organization
- Talked about current or future needs
- Focused on how great your current staff is. The reader already knows!
- Overused words or abbreviations
- Focused on statistics such as how many people you have treated, how many religious school classes you have held or listed specific programs offered
- Written more than a page

Once submitted we will review your case statement, and the rest of your legacy plan, and offer suggestions to help make it as motivating a document as it can be so you start your legacy initiative with a strong foundation for success.

Management Strategy

Your management strategy describes who is responsible for the implementation of your legacy efforts. It should clearly delineate who will have which responsibilities.

To draft your management strategy, **please list each legacy team member followed by their respective roles on the team.** Please note that saying "legacy team" is not sufficient:

- Which if not all, of your team members will be responsible for having conversations with donors?
- Who will be the lead person responsible for implementing the plan and keeping the team on track?
- Who will be responsible for tracking gifts, documents and records?
- Who will be responsible for submitting LIFE & LEGACY Quarterly reports and other required documentation?
- Who will be responsible for implementing your marketing plan? Who will be responsible for implementing your stewardship plan? Specifically who will be responsible for sending out the thank you notes, making sure thank you phone calls are made, making sure legacy events take place and that donor lists are printed?
- Who will be responsible for keeping your board of directors informed of your progress?

Target Audiences and Prospects

Your list of target audiences and prospects provides a listing of the categories of individuals you are planning to have legacy conversations with in the first two years, while building awareness of your legacy program among your entire constituency. **Please list these groups in priority order, starting with your Legacy Team**

To develop your target audience and prospect list, consider the following questions:

- Who is currently well informed about and well connected to your organization (i.e. board members, long-time donors)?
- Who are your long-time loyal and steady donors? (I.e. former board members, past presidents, those who have given a specific amount to annual campaigns for 10 years or more, longtime members, and longtime volunteers)?
- Who are currently receiving services at a meaningful point in their lives (residents of senior living facilities, B'nai Mitzvah families, families whose children are receiving camp scholarships or other financial assistance)?
- Others who have warm feelings for your organization (volunteers, alumni, founders)?

- Considering the longer term, which of your constituents are of an age where they are thinking about wills and estate planning (generally 40's and older)?
- Groups to whom you can make a presentation and then follow-up with individual conversations?
    - Your board
    - Sisterhood or Men's Club
    - Minyanaires
    - Hebrew School families
    - Past presidents

<u>Marketing</u>

During the LIFE & LEGACY training process you will receive information on how to market your Legacy program. As part of your Legacy Plan we want you to begin thinking of ways you can "get the message out," given your current organizational infrastructure.

To draft your marketing plan, consider the following questions:

- Which communication vehicles are currently in place and could be used for marketing your Legacy program?
    - Newsletter – articles/ads
    - Weekly announcements at services/meetings/via email
    - Website
    - Posters / video board / flyers
    - Events
    - Direct mail
    - Blast emails
    - Social media
- How can each of them be used to spread the Legacy message --- and how often?
- Is there a visible physical location to post information about leaving a Legacy or to honor those who do?
- Is there someone in your organization who can interview legacy donors and either write up or tape video testimonials to be shared with others in your community?
- Is it feasible to add some legacy information, at no additional cost, to one or more already scheduled mailings? *Creates awareness but doesn't result in significant number of commitments.*
- Is it feasible to print a separate legacy focused brochure or to incorporate a legacy message into an existing informational piece?
- Are there annual gatherings or other events into which a legacy message can be incorporated?
- Can you easily incorporate legacy information into your existing website?

- If you use social media, can you intersperse a few legacy-themed messages into your usual postings?

Stewardship

Stewardship is key to the success of any Legacy program as it is the way we show appreciation to, and stay connected with, those who have made a legacy commitment. During the LIFE & LEGACY training process we will share stewardship best practices. As part of your Legacy Plan, we want you to begin to think about methods you can easily implement to acknowledge legacy commitments. Best practices include acknowledging, recognizing and engaging your legacy donors a minimum of four times a year.

To draft your stewardship/recognition plan, consider the following questions:

- What types of stewardship activities is your organization currently engaged in?
- Is it possible to include your legacy donors in these existing stewardship activities?
- What types of stewardship activities, if any, will you undertake specifically for legacy donors?
- Will you make a personal phone call immediately upon receipt of a Letter of Intent?
- Will you send a personal note thanking the donor for their Legacy commitment within two days of receipt?
- Will you create a legacy society or incorporate LIFE & LEGACY donors into an existing legacy giving initiative? Will you list legacy society members in a newsletter or acknowledge commitments somewhere in your building?
- Will you send cards at birthdays, Rosh Hashanah, Hanukkah, and/or Passover?
- Will you send a card on the anniversary of your legacy donor's commitment?
- Will you send an organizational update specifically for Legacy donors at least once a year?
- Will you host an event for Legacy donors either stand-alone or as part of (before or after) another organizational event?
- Will you honor Legacy donors at an annual/congregational meeting?
- Will you share testimonials from your Legacy donors with the greater community?

Goals

Participation in the LIFE & LEGACY program requires the establishment of goals for Letters of Intent to be secured each year for a period of two years.

The minimum goal per organization per year is 18 Legacy commitments although we encourage organizations to aspire to secure 25 commitments per year as in the long run this will be of greater benefit to your organization.

For each year please note the number of letters of intent you are committed to securing. **Please note that whatever number you include in your plan is the goal you need to reach to secure the incentive grant.**

You can just articulate your goal in a sentence or you can be more specific as shown in this example:

Year 1	# of Legacy gifts
Legacy team members	4
Board of Directors (20 people)	10
Long-time Donors (any level)	3
Past Presidents	1
Total anticipated gifts in Year 1	**18**

Year 2	# of Legacy gifts
Board of Directors (20 people)	5
Long-time Donors (any level)	7
Past Presidents	3
Capital Campaign contributors	3
Total anticipated gifts in Year 2	**18**

Implementation Checklist

This final section of your Legacy Plan is a checklist of tasks to be accomplished in Year 1. The more specific you can be, the better as this list will assist you in staying on track and reaching your goal. **All activities mentioned under management, target audiences and prospects, marketing, stewardship and goals should be included as either a bulleted set of to-do-items that can be checked off or a calendar highlighting when you are going to undertake each activity.** To assure greater accountability also list the individual responsible for accomplishing the task.

We look forward to reviewing your plan with you!

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