**Creating a Legacy Communications Plan May 2016**

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Your Legacy efforts require getting the word out to reach your goals. How will potential donors learn about the program and find out how to make a legacy commitment? How will existing Legacy donors be stewarded effectively over the long-term? And how can your team balance limited time/resources and the variety of communications channels available to reach your audiences?

A communications plan can help. What content will resonate with your target audiences…and how do you create/collect it? What channels are most likely to reach your target audiences? And how will you balance Legacy vs. ongoing fundraising needs; Facebook vs. direct mail (and other channels); and time spent on Legacy activities vs. other priority tasks?

In this session, we’ll consider the various ways you can reach and engage with current and potential Legacy donors and prioritize them based on the audiences you are trying to reach, the actions you are hoping to promote, and the communications channels available to you.

Participants will leave this session with:

• Goals for your Legacy program communications efforts

• Ideas for communications activities that can have a positive impact on your Legacy goals

• A prioritized action plan custom-fit to the time you have available for Legacy outreach

• Specific tips for more efficient communications

**To Manage Your Marketing/Outreach Time:**

1. **Focus**. Determine your communications goals. What are your most important goals over the next year?
2. **Prioritize**. Decide which channels, outreach efforts will help you reach your goals. Which do you have time to utilize?
3. **Plan ahead**. Use a calendar to keep you ahead of the game. Schedule activities in advance (where possible).
4. **Be efficient**. Get training and learn tricks to spend less time on each individual task.

**Focus**

The Legacy communications goals for every organization are similar, but can vary depending on your current status. For example, an organization just getting started with a Legacy Program might prioritize creating awareness of the initiative among their donors and securing Legacy commitments. Another organization that has a long-standing Legacy Program might prioritize stewardship of donors who have made commitments with the intent of moving them to formalization. Goals may include:

* Raise awareness of the Legacy program (especially to long-time loyal donors)
* Encourage new Legacy commitments
* Steward donors who have signed Legacy commitments
* Increase annual giving by donors who have signed Legacy commitments
* Provide evidence to Legacy donors that they have made a good investment (show impact annual gifts are having so donors know that their Legacy gift will make a difference)
* Connect with partner (or potential partner) organizations
* Increase Legacy event attendance – both organization-wide and special events for Legacy donors
* Education (how Legacy/Planned Giving works; estate planning in general)
* Other?

**Prioritize Channels/Effort**

You have limited resources to manage your marketing/communications activities. It is crucial to prioritize the work you need/want to do to reach your goals. Act on the highest priority activities you have time to accomplish. This is an ongoing process. As you get more efficient with existing activities, more time may be available to take on more responsibility. And priorities may change over time. Keep this list up to date. The charts on the following pages provide content ideas and possible channels to distribute that content – use this as a starting point to plan your own organization’s communications efforts

**Plan Your Content**

Consider creating a Content Calendar to plan all of your content (Social Media, eNewsletters, Direct Mail, etc.) in advance to ensure:

* You won’t miss any obvious content (holidays, event promotion, Legacy Commitment Anniversaries)
* You won’t have to scramble to determine content to post on a regular basis
* Your content is consistent across channels
* You make sure those who have signed Legacy Commitments get the attention they deserve

Want a content calendar template? Email Kevin ([kevin@hgf.org](mailto:kevin@hgf.org)) for some templates to choose from.

**Be efficient**

Use tools/processes/other people to help you manage your time devoted to communications. For example:

*Leverage Content Across Channels*

Have a great story or testimonial from a Legacy Donor? Share it via email. Include it in your Direct Mail. Use it in an ad. Take a snippet of the testimonial and include it on a photo of the donor in Instagram. Post it on your blog and share a link to the blog from Facebook and Twitter.

Does your organization have great content about the impact of your programs? Connect it to the Legacy Program as well.

*Curate Content*

Ask your Legacy donors to share content with you. They can send in a photo to use in promoting Legacy. Or email you a testimonial. Or sit down for a longer interview or short video testimonial.

*Schedule Content*

Facebook, Twitter, blogs, and eNewsletter services all provide functionality to schedule content in advance. Use these tools to prepare content on YOUR schedule…but deliver it on your audience’s preferred schedule.

*Leverage Existing Organizational Channels*

Does your organization already have a blog, print newsletter, eNewsletter, and/or social media channels? Share your Legacy stories, updates, and asks on those channels. Promote Legacy at other events with banners, posters, tent cards.

*Leverage Your Ambassadors*

Those who have already signed Legacy Commitments can be your best ambassadors! Prepare pre-written Facebook, Twitter, Instagram, and email content that your Legacy Donors can use to share that they’ve joined your Legacy Society and ask their friends to join them.

*Segment Your Data*

Are the donors who have a signed Legacy Commitments flagged in your database? How about those who have been asked? Your next set of top prospects? Segmenting your data in your database makes it easier to send more custom messaging to different audiences – special event invitations, stewardship communications, and other outreach efforts.

*Track Touchpoints*

How will you know you are on track with cultivating and stewarding your Legacy prospects and donors? Keep a log of each of the contacts your organization has with them – thank you letters; event invitations; personal phone call; etc. Your donor database should provide functionality to easily track this information.

Bonus: ask your donors their communications preferences…and respect their wishes!

**Legacy Activities Chart**

The charts on the following pages provide examples of content that can be used to help meet Legacy Program goals, as well as potential channels to share that content. You may add other activities that are better suited to your goals and organizational communications plan, and that fit the time/expertise available to your team.

**Content Ideas**

|  |  |
| --- | --- |
| **Type of Content** | **Possible Channels** |
| Stories from people who have signed Legacy Commitments | All |
| Testimonials from people who have signed Legacy Commitments | All |
| Photos of people who have signed Legacy Commitments with testimonials or quotes from Talmud | All, especially Instagram, Facebook, Twitter |
| Video testimonials | All online channels |
| Stories about multi-generational philanthropy | All |
| Stories/Videos of impact of gifts – what are Legacy donors ensuring for the future? | All |
| Pose and answer frequently asked questions about Legacy | All online channels, especially social media and website |
| News updates about Legacy program – status of campaign vs goal; received bonus check; celebrate new Legacy Society Members | All |
| Contest to curate photos, stories, testimonials from people who have signed Legacy Commitments | All, especially social media and email |
| Offer free book on estate planning to anyone who calls and sets up a discussion about the Legacy program | All, especially social media and email |
| Holiday greetings | All, especially direct mail (postcards, cards) |
| Social proof/pressure – i.e., “Only 2 more people need to join our Legacy Society for us to receive a bonus check from the Harold Grinspoon Foundation. Contact <name> to join 18 others in ensuring <impact statement>.” | Social media, email |
| Add 2 lines about “including xyz in your will” to all communications (simple, jargon-free language) | All |
| Infographic about Legacy Society Members and/or impact of Legacy program | All, especially Pinterest and other social media |
| Special thank you videos | Email/website, social media |
| Thank you gifts | Direct Mail |
| Human interest stories connected to leaving your Legacy – surprising bequests; unique ways to leave a Legacy | All, especially Social Media |

**Offline Channels**

|  |  |  |
| --- | --- | --- |
| **Channel** | **Audience** | **Purpose** |
| In-person meetings (one-on-one or dinner parties) | Legacy Society Members | Stewardship |
| In-person meetings (one-on-one or dinner parties - i.e., Jeffersonian Dinners) | Broader Audience | Awareness: Cultivation; Solicitation |
| Events | Legacy Society Members | Stewardship |
| Events | Broader Audience | Awareness; celebrate Legacy Society Members |
| Events re: estate planning (How to plan) | Broader Audience | Awareness |
| Marketing at general organization events: banners; tent cards; info table | Broader Audience | Awareness |
| Marketing at events where you can find your audience: board meetings; community events/fundraisers; classes, other events | Broader Audience | Awareness |
| Marketing at events where you can find your audience: board meetings; community events/fundraisers; classes, other events. Ask Legacy Society Members to stand up to be recognized; provide them perks like VIP seating, extra raffle tickets, etc. | Legacy Society Members | Stewardship |
| Speak from bima on high holidays or part of Yizkor services; legacy Shabbats – donors honored in the presence of synagogue members | Broader Audience | Awareness |
| Speak from bima on high holidays or part of Yizkor services; legacy Shabbats – donors honored in the presence of synagogue members | Legacy Society Members | Stewardship |
| Holiday Cards | Legacy Society Members | Stewardship |
| Holiday Cards | Broader Audience | Awareness |
| Postcards | Legacy Society Members | Stewardship |
| Cards – Birthday, Wedding Anniversary, Anniversary of Legacy Commitment, etc. | Legacy Society Members | Stewardship |
| Ads in local Jewish Press | Broader Audience | Awareness |
| Annual Report | Broader Audience | Awareness; Celebrate Legacy Success |
| Direct Mail | Broader Audience | Awareness |
| Bill Stuffers in General Direct Mail | Broader Audience | Awareness |
| Personal Thank You Notes | Legacy Society Members | Stewardship |
| Brochure (explain program; share FAQs, testimonials) | Broader Audience | Awareness; Education |
| Legacy Society Newsletter | Legacy Society Members | Stewardship; share impact |
| General Organizational Newsletter “issue” devoted to Legacy | Broader Audience | Awareness |
| Donor Recognition Wall, Digital Display, Sculpture | Broader Audience | Awareness; Celebrate Legacy Society Members |
| Flyers | Broader Audience | Awareness |
| Personal Phone Calls | Legacy Society Members | Stewardship |
| Personal Phone Calls | Broader Audience | Cultivation; Solicitation |
| Thank-a-thon (Phone-a-thon of thank you calls) | Legacy Society Members | Stewardship |
| Provide training/script to people who answer phones or provide tours about Legacy program, FAQs | Broader Audience | Awareness |

**Online Channels**

|  |  |  |
| --- | --- | --- |
| **Channel** | **Audience** | **Purpose** |
| Personal email | Legacy Society Members | Stewardship |
| eNewsletter | Legacy Society Members | Stewardship |
| Holiday email promoting Legacy | Broader Audience | Awareness |
| Legacy Information in email signature lines of staff/volunteers/board members/legacy donors | Broader Audience | Awareness |
| Post events on Jewish and secular event sites | Broader Audience | Awareness |
| Special webpage (or full section of site) re: Legacy Program - updated testimonials, information about giving, thanking Legacy Society Members, video stories, event information, FAQs, etc. | Broader Audience | Awareness; Stewardship |
| Prominent link/button to Legacy page on website | Broader Audience | Awareness |
| Facebook | Broader Audience | Awareness |
| Twitter | Broader Audience | Awareness |
| Instagram | Broader Audience | Awareness |
| Youtube or Vimeo | Broader Audience | Awareness; Celebrate Legacy Success |
| Youtube or Vimeo – Special thank you videos | Legacy Society Members | Stewardship |
| LinkedIn | Broader Audience | Awareness |
| Pinterest | Broader Audience | Awareness |
| Other Social Media channels? | Broader Audience | Awareness |
| Blog | Broader Audience | Awareness; Celebrate Legacy Success |
| Guest blog posts or articles on sites where your audience reads regularly | Broader Audience | Awareness |
| Podcast | Broader Audience | Awareness; Celebrate Legacy Success |
| Campaign to have Legacy Donors share why they have decided to put the organization in their will on social media/email. | Broader Audience | Awareness |