



Creating a Legacy Communications Plan

May 2016

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JCamp180, PJ Library

A program of the Harold Grinspoon Foundation

**What is the most
unique or effective
Legacy
communication
you've seen?**





Online Promotion

Personal Meetings/Calls

Direct Mail

Banner/
Recognition Wall

Flyers

Other Channels

Events

Ad



What's the Plan?



Goals



1.

Receive new Legacy commitments

2.

Steward donors who have signed Legacy commitments

3.

What Else?

Goals?

- Raise awareness of the Legacy program
- Receive new Legacy commitments
- Steward donors who have signed Legacy commitments
- Increase giving by donors who have signed Legacy commitments
- Show impact of org to donors who have signed Legacy commitments
- Connect with partner (or potential partner) organizations
- Increase Legacy event attendance
- Education (how Planned Giving works; estate planning in general)
- Other?

What are **YOUR** top 2-3
priority communications
goals **NOW**?

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
Other Ideas?	

Start with Stories



Toby Goldberger: Why I Created a Jewish Legacy

"One of the most meaningful ways you can ensure the continuity of Jewish life is to create a Jewish legacy for generations to follow.

I have been involved in the Jewish community for as long as I can remember. My involvement began with Federation in Plainfield when I moved to Scotch Plains. It continued with my strong commitment to Temple Emanu-El. My children became b'nai mitzvah at our Temple and continued their Jewish education through high school. In addition, my daughter-in-law learned how to chant Torah at our synagogue and participates regularly at our High Holyday services.

"One of the most meaningful ways you can ensure the continuity of Jewish life is to create a

My children and grandchildren have found a home at Temple Emanu-El.

It is one of my deepest and long held belief that the strength of our religion and the need for synagogues to remain in the forefront depends on our commitment to give back. I am participating in the Temple Emanu-El Jewish Legacy Program to leave a legacy for my children, grandchildren, and generations



Nancy & Samuel Bernstein



Sam and I saw our parents and grandparents set high standards for us to follow. Growing up, our Jewish experiences were much different than our daughters. I attended a small temple in Shreveport, LA where there were only about 200 Jewish families. We were active in our community as my Dad was a member of the Temple Brotherhood, and my mom served on the boards of both the Temple and its Sisterhood. Both of my parents were also active in the Northwest Louisiana Federation. Shabbat was always spent with my family. After high school, I attended the University of North Carolina and met Sam in Chapel Hill. We met at a UNC basketball game in January 1984, while I was a student and Sam was working in Charlotte. We were married eleven months later.

What is your legacy be?

For more information, contact 232-6770, ext. 114 or cshane@tewnj.org, or 232-2859 or gailfriedman@comcast.net



Leverage Stories Across Channels

With our lifetime and legacy gifts,
we are helping to sustain Jewish life.



BOOK OF LIFE READ A STORY ADD YOUR STORY CREATE A LEGACY ENDOWMENTS FCJC ACKNOWLEDGEMENTS

Nancy & Samuel Bernstein



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JCamp 180

April 28, 2016 at 3:25pm

"With our lifetime and legacy gifts, we are helping to sustain Jewish life. And even if our daughters' should settle elsewhere, it is our hope that others will do the same for them in their cities as we are happy to do in ours."

Meet Nancy and Samuel Bernstein and find out why they decided to leave a Legacy in our community.

http://charlottebookoflife.org/story_Bernstein_Nancy-Sam.php



Like Comment Share



Kevin Martone

@kmartone

"With our lifetime and legacy gifts, we are helping to sustain Jewish life." #plannedgiving charlottebookoflife.org/story_Bernstein...



3:18 PM - 26 Apr 2016

Like Comment Share

Where Else?

Curate Content

- Ask your Legacy Donors for photos, testimonials (written/video), or to sit down for an interview

Remember A Charity @RememberCharity · 1 Dec 2015

Could you support a charity for years to come like Meryl's legacy?
[@WaterAidUK](https://buzz.mw/ba1wc_f) #GivingTuesday



Meryl Knapp, WaterAid Supporter

Curate Legacy-Related Human Interest Stories

A small-town barber and a million-dollar gift



JESSICA RINALDI/GLOBE STAFF

The Athol Public Library.

By **Andy Rosen** | GLOBE STAFF APRIL 14, 2016

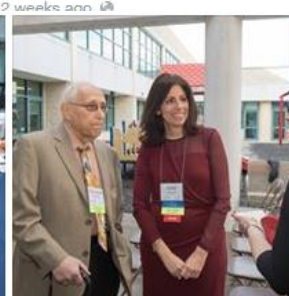


FAMILY PHOTO

Katherine and Anthony Ralys.

Celebrate New Gifts, Legacy Society Members

Cap Region Chamber follows
FMCC_SUNY @FMCC_SUNY - Apr 29
ANNOUNCED TODAY! FM receives a \$2 Million Unrestricted from the Estate of Frances Allen!



JCF LIFE & LEGACY Year 2 Celebration, April 19, 2016

Updated about 2 weeks ago

Nanaimo Museum @NanaimoMuseum - Mar 29
The Mary Holmes memorial bequest will have a lasting impact. Thank you Mary! #peopleMW



← ↻ ❤️ 2 ⋮

Share Impact

 **StCatherine'sHospice**
@StCHospice

  Follow

Did you know that 1/4 of our care for patients in [#Dorking](#) is funded by gifts in wills? [#Legacies](#) [#HospiceCare](#)



RETWEETS 2 LIKES 2



RNLI @RNLI · 29 Sep 2015

six out of ten of our rescues are only possible thanks to gifts generously left in wills

Remember A Charity @RememberCharity

'Stories like these helped us capture the attention of the public and engage people in [#legacies](#)'. Blog from @RNLI: rememberacharity.org.uk/spotlight-on-l...

  11  7 



 **Remember A Charity** @RememberCharity · Mar 14

You could help people like Stewart receive vital care with your [#legacy](#) bit.ly/1RJ4X89 [#BrainAwarenessWeek](#)







   


Don't Be Afraid to Ask!




 **Highway Hospice** Like Page
September 17, 2015 · 

“WHY LEAVE A BEQUEST TO HOSPICE?”

Charitable bequests have been included in Wills for centuries. They are a way of keeping your ideals, your compassion and your vision alive for years, even generations to come. Ask for Heather Walker to initiate a confidential chat about your legacy.

 Like  Comment  Share 

 4

 Write a comment...  

Jenny Questell
April 27 at 3:36pm · Arlington, VA ·

Prince lost control of his legacy. Despite keeping tight control of his music business while alive, he died without a will. If you don't have a will or beneficiary designations, you can't control who gets your \$\$ and you can't leave a bequest for a non-profit organization that you feel passionately about. #plannedgiving #legacy #nowillnoway

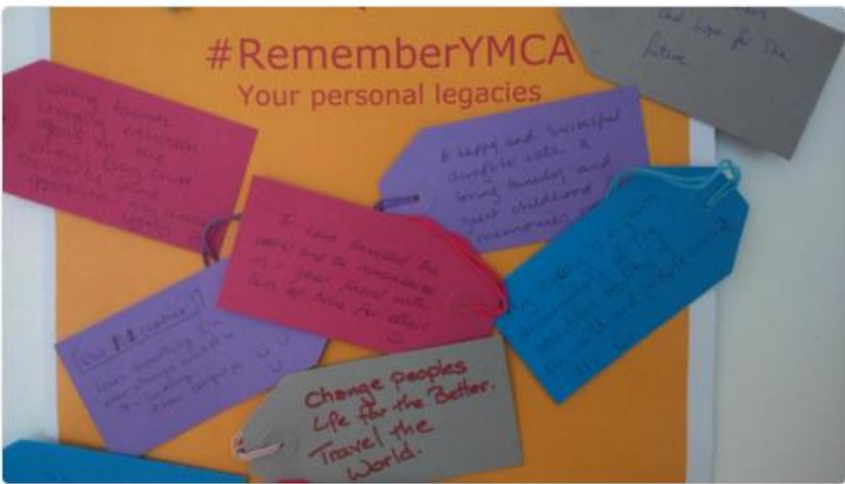


Prince Died Without a Will Documents Filed by His Sister
The singer had no will, according to probate court records filed by his financial estate and musical legacy.
NYTIMES.COM | BY BEN SISARIO

19

Conversation

YMCA England @YMCA_England · 11 Sep 2015
A fun way to promote #RememberACharityWeek in our office - what do you think? #legacy



3 2

Mike Richard If you die intestate (w/o a will) your belonging go to your closest living relative. If you have no heirs, no kids, it goes to your siblings. Funny how this was filed by his sister.
· April 27 at 4:48pm

Jenny Questell Another good article... <http://www.forbes.com> without-a-will/...



Prince Died Without A Will, But Will Be Taxes
FORBES.COM | BY ROBERT W. WOOD

· April 28 at 5:45pm

Jenny Questell *The problem with estate planning is you can't control who gets your money after you die.



NCH Homeopathy @NCHHomeopathy · Apr 16
Thinking about estate planning? Remembering NCH with a **bequest** will help sustain the organization. bit.ly/1VEnvxW

1

Like Page

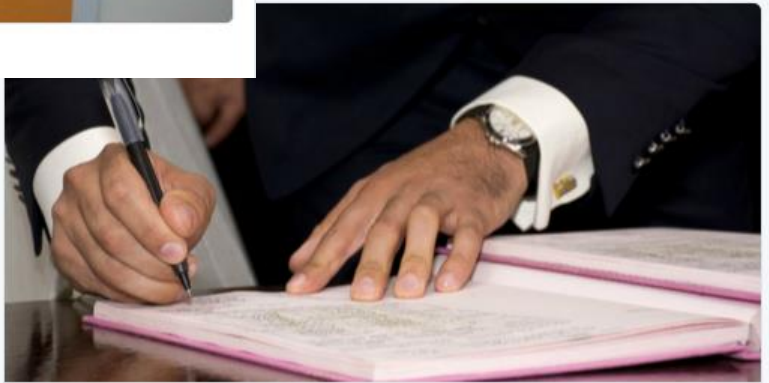
beloved missionary or project of Pioneers? How would you like to leave a bequest of \$10,000-\$20,000 for them, while also supporting Pioneers for the future? Learn how at Pioneers.org/PlannedGiving

Planned Giving Initiative with Pioneers

Pioneers mobilizes teams to glorify God among unreached peoples by initiating church-planting movements in partnership with local churches. We...

[HTTP://PIONEERS.ORG/PLANNEDGIVING](http://PIONEERS.ORG/PLANNEDGIVING)

How do you want to leave your legacy? Check out ACE's new **bequest** policy.



Make Helping Animals Your Legacy | Animal Charity Evaluators

Blog post introducing ACE's new bequest policy, allowing donors to make helping animals your legacy.

animalcharityevaluators.org

3 1

Schedule Content

The image shows a Facebook post creation interface. At the top, there are three tabs: 'Status', 'Photo / Video', and 'Offer, Event +'. The 'Photo / Video' tab is selected. Below the tabs, the post content area contains the text 'What is your favorite flavor of Hamantaschen?' and a photo of several Hamantaschen (dumplings). To the right of the photo is a dashed box with a plus sign, indicating where to add more photos or videos. Below the content area, there are icons for adding a photo, emoji, and location. To the right of these icons are buttons for 'Boost Post' and 'Post'. The 'Post' button has a dropdown arrow, and a blue arrow points to the 'Schedule' option in the dropdown menu. Other options in the menu are 'Backdate' and 'Save Draft'. Below the post creation area, the post preview shows the 'PJ Library' profile picture and name, followed by the text 'Posted by Geoff Oldmixon [?] · 3 hrs · 🌐'.

Schedule Post



Select a date and time in the future for when you want your post to publish.

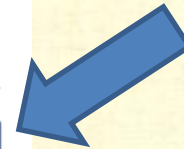
3/18/2015



3:02 PM EDT

Cancel

Schedule



Schedule Content



Online Promotion

Personal Meetings/Calls

Direct Mail

Banner/
Recognition Wall

Flyers

Other Channels

Events

Leverage Existing Channels

Ac

Leverage Your Ambassadors



Melanie Bunch @MBFundraiser · 20 Oct 2015

As a new member of the Peterson Society @buffalostate and gearing up for the NCPP I've got #plannedgiving on my mind



Planned giving conversations: invite financial advis...

Melanie Bunch talks about the value of bringing financial advisors into the planned giving conversations with your donors.

blogfm.ruffalonl.com

Sample Social Media Content

We've provided handy images that you can upload to Facebook, Twitter, Instagram, and LinkedIn!

- Facebook [Profile Picture](#) and [Cover Photo](#)
- Twitter [Profile Picture](#) and [Cover Photo](#)
- Instagram [Post](#)
- LinkedIn [Profile Picture](#) and [Cover Photo](#)
- [Download All the Social Media Graphics](#) (ZIP File)

Sample Messages to Copy, Paste, and Post

Facebook

“ [Pre-event] On April 27, members of the Canisius community will join together for an extraordinary day of giving back. #CanisiusGivingDay, a 24-hour giving campaign, is a chance for Griff's everywhere to come together to show pride in their alma mater, and provide essential funding to support students and shape the college. Together – in just one day – WE CAN make Canisius the best possible experience for our students. Mark your calendar and make your gift on 4.27.16 at canisiusgivingday.com.

“ [Day of] I'm helping Canisius College meet its goal of 427 donors for #CanisiusGivingDay on April 27th. Will you join me in supporting today's Golden Griffins? If 427 donors make a gift today the Canisius College Board of Trustees will provide thousands of dollars of additional support. Make your gift today at canisiusgivingday.com.

Segment Your Data





WE'VE BEEN HAVING FUN SINCE 1951!

Date

Address
Address
Address

Dear Past Annual Campaign Donor XXX,



Celebrating Our
60TH
Anniversary

Date

Address
Address
Address

Dear Alumni-Never Given XXX,

*"I loved star gazing, how
fields in the morning and
camp. [Camp] is an ab
Sa*

Similar to Julie, as a former campe
At Camp JCA Shalom kids make li
discover their Jewish identity in a f



Celebrating Our
60TH
Anniversary

Date

Address
Address
Address

Dear LYBNT Donor XXX,

"Ben is not an easy kid to please. You never know when or how or where he will be happy. But I will tell you that the two weeks he spent at JCA were the most fulfilling and joyous. That's coming from a kid who said, 'I'm never going to camp again, especially not a Jewish camp.' Ben came home with a greater understanding and passion for Israel in two weeks than he gained after five years of religious school. It was a treat to see a smile on his face."

-from a camp mother in appreciation of her son's campership

As one of our supporters, you already recognize the transformative power of camp. At Camp JCA Shalom, kids make life-long friends, develop into leaders, and join a community. They play and discover their Jewish identity in a fun environment.

As one
long f
enviro

Track Your Touchpoints

- It's important to track internally how (and how often) your organization has contacted Legacy prospects and those who have made a Legacy Commitment

Kevin Martone (119541)

Main *Gifts* *Pledges* *Tributes* **Contacts** *Bio* *Other Info* *Links* *Addresses*

Save Add To Outlook Calendar | Link Contact to Gift/Pledge

Contact Details

Contact/Entry Date 10/07/2013

Due Date 10/10/2013

Time

Completed Date

Activity Telephone Call

Mailing Code

Assigned To campalum1

Plan Name

Plan Action

Document Path

Contact Notes

Call with Kevin to discuss Legacy Program. Schedule visit to camp next summer.

Insert date

Plan Your Content

	Week Days	Monday	Tuesday	Wednesday	Thursday	Friday	Weekend		
	Month	January							
Legend:	Week of:							Focus: Promote new sign-ups	
eNewsletter	Jan. 1	Smith Family Profile			Status Tag Event on JCC Pg		FB Posts this wk	Theme: Personal Stories	
Facebook - Wall	Jan. 8	JCC Reading		Video of Event			FB Posts this wk	Keywords:	
Facebook - Update	Jan. 15	Send link to sign-up for PJ					FB Posts this wk	Events: Readings at JCC	
Facebook Collab	Jan. 22						FB Posts this wk		
	Month	February							
Video	Week of:							Focus: Love the PJ Library!	
Blog	Feb. 1	Promote Feb. Readings		What do you love about PJ Library?			FB Posts this wk	Theme: Love of Books, PJ	
Print Newsletter	Feb. 8	Status Tag Event on JCC Pg		JCC Reading		Video of Event	FB Posts this wk	Keywords:	
Twitter	Feb. 15						FB Posts this wk	Events: Readings at JCC	
PR	Feb. 22						FB Posts this wk		
Events	Month	March							
	Week of:							Focus: Passover	
	Mar. 1						FB Posts this wk	Theme: Passover	
	Mar. 8						FB Posts this wk	Keywords:	
	Mar. 15						FB Posts this wk	Events: Various Passover Events	

Plan Your Content – Another Option

Date	Time	Channel	Copy/Notes	Link	Image
3/6	2:00pm	Facebook	How can we make the #Purim story more kid-friendly? Visit the PJ Blog for a few suggestions: https://pjlibrary.org/Beyond-Books/PJBlog/March-2016/Making-the-Purim-Story-More-Kid-Friendly	https://pjlibrary.org/Beyond-Books/PJBlog/March-2016/Making-the-Purim-Story-More-Kid-Friendly	
3/7	8:00am	Facebook	#MondayMotivation Happy #MusicMonday! Take a listen to PJ Library artist @thejamtones latest here: joshandthejamtones.com	https://twitter.com/NaomiHowland/status/707792825874780161 https://www.facebook.com/PJLibrary/photos/a.416993785024107.96974.150325725024249/1049032135153599/?type=3&theater	
	12:00pm	Twitter	In honor of #MusicMonday: How A PJ Library CD Helped Me Worry Less PJ Mom Adina Kay-Gross reflects on the impact of PJ Library music on her family's Judaism. https://pjlibrary.org/.../How-a-PJ-Library-CD-Helped-Me-Worry...		
	6:30pm	Facebook	International Women's Day		
3/8	8:00am	Facebook	Summer is right around the corner - which means Jewish summer camp! Did you know these famous Jews spent their summers at Jewish camps? Tell us about your camp experiences and what camp means to you in the comments - you can also check out some great PJ Library books about camp here: http://bit.ly/PJLCamp http://www.timesofisrael.com/9-famous-jews-who-attended-jewish-summer-camp/		
	6:30pm	Facebook	"I thought I was signing up for free Jewish children's books. What I got was so much more." via @kveller http://www.kveller.com/i-thought-i-was-signing-up-for-free-jewish-books-but-what-i-got-was-so-much-more/		

Email kevin@hgf.org if you would like a template

Goals?

- Raise awareness of the Legacy program
- Receive new Legacy commitments
- Steward donors who have signed Legacy commitments
- Increase giving by donors who have signed Legacy commitments
- Show impact of org to donors who have signed Legacy commitments
- Connect with partner (or potential partner) organizations
- Increase Legacy event attendance
- Education (how Planned Giving works; estate planning in general)
- Other?

What are **YOUR** top 2-3
priority communications
goals **NOW**?

What's YOUR Plan?



- 2-3 Priority Goals for YOUR Organization
 - » 3+ Actions/Channels/Content Ideas to help you reach EACH of those goals

Stewardship - Minimum of 4 Touches

- Thank you note
- Phone call
- Cards – Birthday, Holiday, Anniversary of Legacy Commitment
- Personalized letter specifically for Legacy donors
- Gifts

- Newsletters or newspaper
- Website
- Poster, digital display, or donor wall
- Annual report or programs
- Annual meeting or other gatherings

Personal Touch

Donor Listings/
Testimonials

Recognition at
“Community”
gatherings

Special
gathering for
Legacy donors

- Legacy Shabbats
- Annual meetings – light candles
- Galas or other special events

- Reception before “community” gathering
- Shabbat Dinner
- Invitation to event not open to general community

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
Holiday Cards	Legacy Society Members	Stewardship
Postcards	Legacy Society Members	Stewardship
Personal email	Legacy Society Members	Stewardship
eNewsletter	Legacy Society Members	Stewardship
Facebook	Broader Audience	Awareness
Twitter	Broader Audience	Awareness
Instagram	Broader Audience	Awareness
Youtube or Vimeo	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
Other ideas?		



kevin@hgf.org