Life & Legacy
ASSURE JEWISH TOMORROWS

Legacy Coordinator Instructions
for Using the Life & Legacy® Board Assessment and
Life & Legacy® Menu of Board Resources

Goal:

- Deepen board understanding of endowment and legacy giving
- Develop board capacity for fund raising to support organizational mission
- Build a culture of philanthropy by
    - Educating members on their role as ambassadors
    - Engaging board members in donor stewardship
    - Integrating legacy giving into all development efforts

Note: Resources are available for whatever starting point best characterizes your board.

Resources:

There are four main resources.
Life & Legacy® Flowchart for Legacy Integration (demonstrates the stages to full legacy integration)
Life & Legacy® Board Assessment (first step to determine starting point for further education)
Life & Legacy® Menu of Board Resources (all the resources listed in one place)
Life & Legacy® Board Meeting Planner (for calendaring board legacy education)

Suggested Steps:

1. Meet with the organization's Board president, CEO/ED and legacy team lead to share the **Life & Legacy® Board Assessment** tool and determine their willingness to engage their board in this effort.

2. Have President complete the **Life & Legacy® Board Assessment** with the CEO/ED and/or executive committee. Include the legacy team chair or a member of the legacy team in the Assessment review.

3. After completing the Assessment, meet with the President, CEO/ED and legacy team lead. Discuss the following questions:

a. What stage best characterizes your board at this time?
b. What training will be most effective?
c. What articles, tips, resources would you like to use?
d. When will you bring this to the board?
e. Who will present/train/facilitate discussion?

Use the **Life & Legacy® Menu of Board Resources** to identify which materials the Board would benefit from this year. The materials are easily customizable and can be presented or facilitated with minimal support. The types of materials include:

i. Short, targeted trainings
ii. Facilitated group discussion
iii. Tips, Samples, Articles

Use the **Life & Legacy® Board Meeting Planner** as a tool to map out the Board meetings and to calendar presentations and trainings. The organization might aim for 3-4 trainings per year and consider a multi-year process for ongoing development.

4. Send a thank you to Board Chair and CEO/ED. Follow up to determine what materials are needed, dates for training, and what support is necessary. Create a schedule for the year, including presenters. Recommended presenters might include the Legacy Coordinator, Organization Development Director or Executive Director, or Legacy Team Lead or Member.

5. Meet with each presenter in advance of the meeting to review material and ensure they feel confident fielding questions. If you are the presenter, practice giving the presentation several times and think through the types of questions you anticipate receiving so you will have answers ready to share

6. Check in with Board Chair/CEO/ED following each session to evaluate progress and prepare/provide materials for next training.

The **Life & Legacy® Board Assessment** and **Life & Legacy® Menu of Board Resources** have been created specifically to strengthen your Board's legacy initiative. They were developed by the Life & Legacy Team in consultation with non-profit Board expert Nanette Fridman.

Please contact your HGF Legacy Community Consultant with any questions and comments. We are open to feedback as we further refine these materials.