



## **Team Job Descriptions**

### **Team Member's Role and Responsibilities**

- Has clear understanding of the purpose and goals of the program and is committed to ensuring the long-term stability of the organization through endowment building
- Makes legacy commitment to organization
- Responds in a timely manner to communications and requests and is accountable to the agreed upon work, goals, and deadlines
- Commits to having legacy conversations with prospective donors and assist the legacy initiative in one or more other ways such as marketing, stewardship, quarterly reports (Recommended commitment is to have a minimum of one legacy conversation per month per team member)
- Attends all trainings facilitated by HGF and/or Legacy Coordinator
- Attends team meetings to report on progress and strengthen relationships with fellow team members
- Participates in the writing of a Legacy Plan
- Works collaboratively with other team members to achieve organizational goals
- Assists in thanking donors for their commitment to the community
- Agrees to work collaboratively with other organizations' legacy teams
- Works to integrate legacy giving into the organizational culture and ensure the sustainability of the organization's legacy effort

### **Team Leader's Role and Responsibility**

In addition to the team member's responsibilities, the team lead will also:

- Serve as the central contact for the Legacy Coordinator
- Receive information from the Legacy Coordinator and ensure team members are kept up to date
- Work with staff liaison to recruit new team members as needed
- Coordinate efforts of the team and hold regular team meetings to insure all team members are accountable for their assigned responsibilities
- Motivate team members to reach organizational legacy goals
- Maintain a working understanding of the organization's Legacy Plan, make revisions as needed, and ensure that the Plan is followed and all deadlines are met
- Facilitate the assignment of prospective donor names to team members based on relationships and other considerations