



Tips for Sustaining Your Legacy Program

Integrate into board activities

- Legacy team a standing committee of the board
- Appropriate succession plan in place for chair and for new members
- Legacy committee report on board meeting agenda at least quarterly – report on new gifts secured, total number of commitments, estimated future value, gifts realized
- Continue to strive for 100% board participation – establish expectation
- When board member legacy gifts are realized – honor individual/couple at next board meeting

Stay motivated

- Secure intrinsically motivated team members
- Continue to set goals and achieve them
- Celebrate your success

Continue conversations and formalization

- Core group of people having new conversations and following up on formalization
- Annually review prospect list and assign to team members
- Members commit to a minimum of one conversation a month
- Committee meets quarterly to review progress

Marketing in perpetuity

- Every issue of newsletter has something legacy – testimonial, advertisement, article, legacy society listing, realized gift announcements
- Website has legacy page – preferably Leave a Legacy button next to Donate Now – include case statement, Letter of intent form, testimonials, link to Foundation website
- Change up language – Russell James Words that Work
- Use stickers/ribbons/pins to identify legacy donors

Stewardship integrated into organizational calendar

- Minimum four touches per year – personal, listings/testimonials, event for legacy donors/event honoring legacy donors amongst community members. *Remember to report on impact*
- Stewardship continues upon a donor's passing

Integrated into all fundraising activities

- All appeals include a place for donors to express interest in learning more about leaving a legacy
- Use integrated ask – secure annual, capital, endowment gift and then ask to consider leaving a legacy

Transition to a Culture of Philanthropy

- Staff and lay leaders act as ambassadors and promote philanthropy
- Staff and lay leaders act in donor-centric way
- Staff and lay leaders see fundraising as a method for engagement
- Take steps noted on back