



LIFE & LEGACY™ Workshop Descriptions

Year 1 Curriculum

Focuses on providing legacy team members with the tools they need to begin securing legacy commitments, marketing their program and stewarding donors.

Why Legacy? Why Now?

This presentation kicks off LIFE & LEGACY in each community. Providing an overview of Harold Grinspoon's decision to start the program and LIFE & LEGACY's national success, this presentation focuses on why now is the right time to ask donors for legacy gifts as a way to build a strong, permanent endowment that will sustain each organization and the Jewish community as a whole far into the future. The presentation also includes an overview of the curriculum and expectations of all legacy teams. It is intended to get all the organizations in the community excited about being part of a successful national initiative and to apply to be part of their local community's program.

Writing Your Legacy Plan

A thoughtful, well written plan will ensure that each legacy team is working together toward a common goal with expectations and accountability clear from the start. Components include: a case statement, responsibilities of each member of the team, target prospects, marketing plan, stewardship plan, incentive grant goals and, an implementation strategy.

The Legacy Conversation

Securing a legacy commitment differs in many ways from transactional annual campaign conversations. This workshop focuses on the art of guiding a donor conversation to uncover the emotional connection that a legacy prospect has for one or more communal organizations and then asking the prospect to join in ensuring the future of the local Jewish community. This session includes role-plays so participants leave with the confidence they need to begin having conversations.

Marketing Your Legacy Program

Marketing is a necessary component of any legacy program for both creating general awareness of an organization's legacy initiative and for securing legacy commitments. This workshop begins with each team examining how they already communicate with their donors and provides examples as to ways to integrate legacy marketing into existing marketing efforts. HGF marketing templates and marketing examples from other communities are shared. Additionally, information is provided as to how organizations can create their own legacy marketing that is effective and donor-centered.

Effective Stewardship

Keeping our donors connected and showing our appreciation and gratitude over the course of their lifetime are key to keeping legacy commitments intact. This workshop stresses the importance of stewarding donors and shares best practices in the area of donor recognition and on-going stewardship.

Year 2 Curriculum

Focuses on gaining expertise and embracing legacy giving within the culture of each organization and the community as a whole.

From Letter of Intent to Formalized Commitment

Moving a donor from intent to a formalized legacy commitment is the next step in insuring a commitment comes to fruition. This workshop provides guidance on how to have a follow-up conversation with a committed legacy donor and guide them to action that includes the legal paperwork to formalize their gift. This session includes role-plays so participants become comfortable having these follow-up conversations.

Best Practices/The Integrated Ask

Now that legacy teams have taken the initial steps to integrate legacy giving into their organizational culture, this workshop digs deeper by celebrating Year 1 successes and discussing challenges as well as reviewing marketing and stewardship best practices in order to take the legacy program to the next level. Additionally it focuses on integrating legacy conversations into all components of an organization's fundraising efforts.

Being Donor Centric

Recognizing that donors are critical to the success of any non-profit, this workshop focuses on what it truly means to be donor-centric in our thinking and our actions and how we can incorporate new practices into our existing culture that allow donors to fully be appreciated for all they make possible.

Year 3 Curriculum

Focuses on the formalization of Year 1 and 2 legacy commitments, implementing strong stewardship practices and further integration of legacy giving into the culture of each organization and the community. Workshops and team meetings are scheduled based on the individual needs of each community.

Stories, Stewardship and Formalization

Setting the legacy teams up for continued success, this workshop stresses the importance of using stories, both legacy donor and organizational, to steward donors, encourage additional legacy commitments and show current legacy donors that they have made a good investment as well as reviewing the components of the Year 3 and 4 Stewardship plan and the formalization process.

Year 4 Curriculum

Focuses on the formalization of additional legacy commitments, implementing strong stewardship practices and ensuring that legacy giving is now part of each organization and the community's culture. Workshops and individual team meetings are scheduled based on the individual needs of each community.

Sustaining Your Legacy Program

Focuses on ways to make sure each organization's legacy initiative is fully integrated into the culture and continues in perpetuity.