

Get Ready

Team

- Form Team
- Create a prospect list
- Attend training
- Announce legacy initiative
- Commit to personal legacy gift

Board

- Educate on importance of endowment building
- Secure board buy-in

Marketing

- Announce legacy initiative

Stewardship

- Evaluate existing stewardship activities for all donors

Stage 1

Team

- Meet monthly
- Assign specific roles
- Attend trainings
- Complete legacy plan
- Begin conversations
- Begin reporting, tracking system for prospects and donors

Board

- Commit to personal legacy gift
- Understand role as ambassador
- Add endowment, legacy reporting to meeting agendas

Marketing

- Create legacy awareness
- Add legacy to website

Stewardship

- Recognize and thank all legacy and endowment donors
- Establish legacy society
- Celebrate legacy donors

GOAL: Secure 18-25 LOIs

Stage 2

Team

- Meet regularly
- Attend trainings
- Update prospect list
- Have conversations
- Learn formalization process
- Formalize personal gift

Board

- Thank legacy donors
- Understand role of endowments in funding operations

Marketing

- Drip legacy message
- Use tagline
- Highlight success

Stewardship

- Connect personally with legacy donors
- List legacy donors
- Share testimonials
- Celebrate legacy donors

GOAL: Secure 18-25 LOIs

Stage 3

Team

- Add new members
- Update prospect list
- Have conversations
- Celebrate success

Board

- Formalize personal gift
- Train new board members on legacy
- Assist in stewarding legacy donors
- Draft Gift Acceptance and Endowment Policies
- Begin incorporating legacy with other fund-raising efforts

Marketing

- Drip legacy message
- Use donor-centered messaging
- Update website
- Share stories of impact

Stewardship

- Implement Stewardship Plan
- Celebrate legacy donors

GOAL: Secure 4 new LOIs, 50% Formalization

Stage 4

Team

- Update prospect list
- Have conversations
- Celebrate success
- Prepare Sustainability Plan

Board

- Actively participate in stewarding legacy donors
- Adopt Gift Acceptance and Endowment Policies

Marketing

- Regularly drip donor-centered legacy message
- Integrate legacy message into all materials
- Share stories of impact and donor testimonials

Stewardship

- Integrate stewardship activities into organizational calendar
- Celebrate legacy donors

GOAL: Secure 4 new LOIs, 75% Formalization

Full Integration

Team

- Integrated into overall development efforts
- Volunteer has 'legacy portfolio' on board committee
- System in place for tracking legacy donors over time
- System in place for continuing conversations and formalizations

Board

- Sets example with personal annual & legacy gifts
- Understands role in mobilizing resources to support organization
- Ambassadors for resource development
- Integrates legacy into all development efforts
- Stewards legacy donors
- Appreciates gifts at all levels

Marketing

- Marketing efforts are donor centered, on-going and use varied media to convey legacy message
- Legacy is integrated with all other fundraising efforts, giving donors options to choose how to support the organization over time
- Legacy giving is normative

Stewardship

- Ongoing and varied
- Legacy donors feel appreciated
- Donors are engaged in the organization
- Donors are partners
- Everyone has a role



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