



Life & Legacy® Menu of Board Resources

Boards of Directors will be at varying stages of understanding endowment and legacy giving [see [Life & Legacy® Flowchart for Legacy Integration](#)]. The [Life & Legacy® Board Assessment](#) will reveal where your board is currently. After completing the Assessment, you can determine which resources will best advance their learning.

This [Life & Legacy® Menu of Board Resources](#) details what is available. The [Life & Legacy® Board Meeting Planner](#) will assist in calendaring these elements. Our recommendation is to bring short segments of endowment/legacy giving training to the board at least four times a year.

Legacy Board Development Planning Documents

[Life & Legacy® Flowchart for Legacy Integration](#)- Explains the stages from beginning a legacy effort to creating a culture where legacy giving becomes normative.

[Life & Legacy® Board Assessment](#) – To be conducted by the Board President, CEO/Executive Director, Legacy Team Chair (or team member) and Community Legacy Coordinator. You can include the executive committee and/or full board as desired. The Assessment, when combined with the resources provided, will lead the board to a deeper understanding of and engagement with legacy giving.

[Life & Legacy® Menu of Board Resources](#) – List of trainings, discussions, tips, articles and more

[Life & Legacy® Board Meeting Planner](#) – Calendar for bringing legacy training to board.

Trainings:

These are short training presentations you can bring to your board that educate them on endowments, legacy giving, their role, and culture change.

[Initial Board Presentation](#)

[Financial Resource Development & the Board's Role in Securing Legacy Gifts](#)

[Being Ambassadors for Your Legacy Initiative](#)

[Culture of Philanthropy](#)

Board Discussion:

These are questions/items that you can bring to your board to deepen board members' understanding of their role in creating a culture of legacy giving.

[14 Questions for Board Members](#)

[The Legacy Donor Bill of Rights](#)

[The Donor Centric Pledge](#)

Tips:

Here are tip sheets for easy reference.

[Tips on Encouraging Board Members to Make their Own Legacy Commitments](#)

[Tips for Initial Board Presentation](#)

[Endowment Giving Conversational Cues](#)

[7 Ways Board Members Can Support Your Legacy Initiative](#)

Samples:

These samples set up your board for Endowment/legacy giving success.

[Board Orientation 1 page Letter Explaining Endowment and Legacy Giving](#)

[Board Resolution Establishing Endowment Fund](#)

Sample Endowment Materials and Policies:

- [Gift Acceptance Policies from Kathryn Miree](#)
- [Gift Acceptance Checklist from Kathryn Miree](#)
- [Basic Endowment Agreement from Kathryn Miree](#)
- [Endowment Policies from Kathryn Miree](#)
- [Charitable Gifts of Noncash Assets, 2nd Edition Bryan Clontz](#)

Resources:

[Life & Legacy® Sustainability Workbook](#) – keep your legacy effort moving forward.

[Legacy Giving: A Step-by-Step Guide](#) - easy to follow self-guided course to understand legacy giving; helpful for training new board members.

[Legacy Giving: A Step-by-Step Guide Self-Guided On-Line Course](#).

Articles:

You may want to share these articles with your board over time.

[The Golden Rule of Board Engagement](#), Barbara Maduell in eJP

[Action steps for engaging your board in your legacy initiative](#), Claire Axelrod

[Endowment as a Moral Imperative](#), Bruce Powell

[Making the Cases for Endowments](#), Dirk Bird