



Tips for LIFE & LEGACY Year 2

Continue to have team meetings and legacy conversations:

- Maintain your schedule of meeting periodically with your team.
- In the first Year 2 meeting, review your Year 1 prospect list and compile a list for Year 2.
- Give each team member two donors to contact before your next meeting.
- Maintain your schedule of a minimum of one legacy conversation per month per team member
- Report back to your team on your conversations.
- Consider expanding your legacy team by inviting one or two of the donors who committed in Year 1 to have conversations with their friends.

Use the Year 1 Celebration to generate new legacy commitments:

- Share the good news that you reached your Year 1 legacy goal and secured the incentive grant.
- Publicize your Year 1 success through newsletters, e-mail blasts, Facebook posts, at board meetings.
- Make the community aware that you can secure another incentive grant if you reach your Year 2 commitment.
- Thank you legacy donors, either through email or personal note, and ask them to share their reasons for leaving a legacy with others in order to help you reach your Year 2 goal.

Continue to work towards 100% board participation:

- Share your Year 1 success with your board.
- Restate your desire to have 100% board participation and advise as to where you currently stand toward reaching that goal.
- Have individual conversations with those board members who have yet to commit.

Continue to market your legacy initiative:

- From this point forward, and forever, every newsletter should have something legacy in it.
- Utilize donor listings, articles about your legacy initiative, donor stories and legacy ads to market your legacy initiative.
- Mix it up so that people notice...if it's the same listing or the same ad every time, they will not see after a while.
- Synagogues – make sure to promote during the high holidays – include in remarks, list legacy donors in the lobby and/or in High Holiday booklet or Yizkor book, place legacy ad or banner where people will see it.

Utilize your website to promote legacy giving:

- Add a “Leave a Legacy” button to your home page that links people to a legacy page.
- Include your case statement, a list of legacy donors and donor stories (testimonials) as well as a downloadable Legacy commitment and Legacy gift confirmation forms.

Continue to actively steward your donors:

- List donor names a minimum of four times a year.
- Host a legacy gathering specifically for legacy donors – can be in advance of something you are already doing.
- Recognize your legacy donors amongst your “community” – at an annual meeting, gala or Legacy Shabbat.
- Ask donors to wear “Ask me about my legacy!” ribbons at event.
- Publish donor stories as to why they chose to leave a legacy.
- Implement a minimum of one “personal touch” – birthday or holiday card, legacy anniversary card, challah & honey or mislochat manot.

Begin having formalization conversations with your Year 1 donors:

- Undertake based on the process being implemented in your community.
- These conversations provide an opportunity to check in and thank the donor in addition to making sure their philanthropic desires come to fruition at the appropriate time.

Don't lose momentum:

- Have a seamless transition from Year 1 to Year 2.
- Continue to have conversations and build on the success of Year 1.
- Remember, you are working to secure the future of an organization that is valued by your community....so keep having those conversations, marketing and stewarding your donors.