



## Tips for Leveraging Incentive Grants

### Board of Directors

- At a board meeting provide an update on your legacy effort and stress the fact that if successful you will be the recipient of an unrestricted grant of (amount) from the Federation/Foundation/Harold Grinspoon Foundation.
- Ask board members to assist you in reaching your goal and receiving the grant by making their legacy commitment in the next few weeks.
- Ask board members if they know of others who would be good legacy prospects to please speak with a legacy team member.

### When Speaking with Potential Legacy Donors

- When meeting with a donor not ready to make a commitment now, let them know that if they sign a letter of intent before (date) they will help you receive an unrestricted incentive grant of (amount) from the Federation/Foundation/Harold Grinspoon Foundation.

### Newsletter/Email

- Include an article in a newsletter or email announcing or reminding your donors/families/congregants/clients that you are part of LIFE & LEGACY™ and if you secure (number) legacy commitments by (date) you will be eligible to receive an unrestricted incentive grant which will be used for (whatever purpose you plan to use the funds for).
- Include the following statement: Have you included a gift for (organization) in your will, trust, retirement account or life insurance policy? By letting (name) know, you will assist us in securing an unrestricted incentive grant of (amount) from the Federation/Foundation/Harold Grinspoon Foundation.

### Poster/Flyer

- Track your legacy commitments in a visible way, by using a thermometer or some other image showing progress towards your goal. Note that when you reach, you will receive an unrestricted grant of (amount).

### Events/Meetings

- Include information about LIFE & LEGACY™ at events such as a congregational meeting, annual meeting or, grandparent's day and mention if you secure (#) of legacy commitments by (date) you will receive an unrestricted incentive grant of (amount) from the Federation/Foundation/Harold Grinspoon Foundation.

### Ad

- Create a small ad: How will you assure Jewish tomorrows? By remembering (organization) with a gift in your will, trust, retirement account or life insurance policy. Let us know you are interested in doing so and help us secure an unrestricted grant of (amount) from the Federation/Foundation/Harold Grinspoon Foundation.

### After You Have Received an Incentive Grant

- During the subsequent year, you can refer to last year's incentive grant and the impact of that grant to encourage prospects to make a gift this year and earn another incentive grant.
- Announce receipt of incentive grant at board meeting, annual meeting or other appropriate gathering.
- Announce receipt of the incentive grant via social media with a photo of the legacy team thanking them for their efforts.