



Tips for Stewardship upon the Passing of a Donor

1. Obtain funeral, shiva and memorial gift information from synagogue, obituary or family.
2. Email Board, Legacy Committee members and appropriate staff with funeral and shiva information. Make sure to share the donor's relationship to your organization.
3. If the donor has shared a testimonial or prepared a Book of Life statement, contact the Rabbi to see if this information would be helpful in the preparation of a eulogy. If so, forward.
4. If you have knowledge of them, notify other community organizations with which the donor had strong relationship.
5. Make sure the appropriate person from your organization attends the funeral and/or makes a shiva call.
6. Mail a sympathy card(s) or letter(s) to surviving spouse and children. If the donor has prepared a testimonial or prepared a Book of Life statement, consider including a copy.
7. Make a tribute donation in memory of the donor, if appropriate.
8. Mark donor deceased in appropriate databases and note date of death in electronic and paper files.
9. If your organization's practice, mark donor *of blessed memory* in all listings wherever his/her name appears.
10. If you maintain a Yahrzeit Listing, add to this list.
11. Add a tickler to calendar to send a personal note out to the family upon anniversary of donors passing.
12. Review Legacy Gift Confirmation paperwork.
13. Publish a story about the donor honoring them for their legacy commitment to the community. May want to get approval from the family in advance of publication.
14. At appropriate time (3-6 months) advise/contact Professional Advisors if you have not heard from them and if known.
15. When receive legacy gift, send personal note to the family acknowledging receipt and expressing gratitude and appreciation for donor's commitment to organization/cause.
16. Check archives to gather photos or videos or other material and put together a package for the family. If possible, deliver it in person and spend time going over the memories.