

Legacy Action Plan

- 1. Case Statement**
- 2. Identify Legacy Prospects**
- 3. Outreach and Marketing**
- 4. Recognition and Stewardship**
- 5. Management: Staffing and Leadership**
- 6. Timeline of Tasks and Activities**
- 7. Goals: Conversations and Legacy Intents**

1. Case Statement

The “case for support” – sometimes called a “case statement” – is a document which outlines the strategic thinking behind an organization’s outreach campaign. The case statement is at the heart of the Legacy action plan. The first audience will be internal stakeholders – your Legacy team, your board and staff. You want to use the document to explain to them what you are thinking about doing and why, and get their input and support. Ultimately, you will use the document in the process of cultivating donors and asking for Legacy commitments. Depending on the donor’s preference, you may give them the case statement in a physical document, but in any case, the material in it will help structure the conversations with potential donors.

The case statement must be a motivational document that is persuasive and should attempt to accomplish the following:

- ☑ Serve to justify and explain the organization, its program and needs, so as to lead to advocacy and actual support.
- ☑ Attempt to win the donor with the nature of the vision that characterizes the leadership of the organization and to reassure the reader of the wisdom and responsible nature of the organization’s management.
- ☑ Characterize the organization so that it is distinctive in the eyes of the donor.
- ☑ Be positive, forward looking and confident, with all the facts and projections reasonable, clear, vital and accurate.
- ☑ Carefully set forth your organization’s plans in terms of policy, priority and enduring benefits. The following questions must be anticipated from the donor: Why this institution? Why now? Why me? How?
- ☑ The case must be clear and concise.
- ☑ The case must create a substantial plan for the future, not a burdensome revisiting of the past, no matter how honored or glorious. In a real sense it is a prospectus, which should invite investment.
- ☑ A case is a reasoned argument for the organization to receive the support it needs in order to continue flourishing as an essential community and educational resource.

There is no one formula for a successful case for support but the following are the key components to be covered: **Case Statement**

Topic

History and current situation

Vision for the future

The “needs” to reach this vision

Questions to address

- What impact has the camp had to date on the Jewish world and beyond?
- What is the current status of the camp? (Particularly for those who haven't been in touch recently.)
- Who has benefited from the camp (past and current campers, staff, parents, etc.)?
- What is your vision for the future of the camp?
- What is and will be unique about the camp that will make an essential contribution to the world?
- What will the camp and the broader world look like when you succeed in realizing this vision?
- What is the gap between the vision for the future and today's reality?
- What are the key strategic initiatives that you propose to adopt to close this gap?
- Why is a Legacy gift important to these efforts?