

LIFE &  
**LEGACY**  
FOR JCAMP 180



As my ancestors planted  
for me, so do I plant for  
my children

- *Taanit 23a*

# Writing Your Legacy Plan

Harold Grinspoon Foundation – October 2020

# Why Plan?



A Legacy Plan provides the **roadmap** for your successful journey in achieving **after lifetime gifts** from those who are **passionate about your camp.**

# Legacy Plan Components



- **Case Statement**
- Management Strategy
- Target Audiences & Prospects
- Marketing
- Stewardship
- Goals
- Implementation Checklist



# Case Statement



- Will be used as a **one-page leave-behind** after conversations
- Gives your Legacy team **common language for their conversations**
- Language can be used in **marketing materials**

**Charleston Jewish Family Services**  
AN AFFILIATE OF THE CHARLESTON JEWISH FEDERATION

Charleston Jewish Family Services provides financial and emotional support and assistance to those in need of help in our community. CJFS is guided by the fundamental Jewish values of tzedakah (charity) and tikkun olam (repair of the world).

Because CJFS believes in the value of chesed, the assistance is offered confidentially and provided in a caring and nurturing manner; clients feel taken care of by their community. In this respect, CJFS embodies the Jewish idea of "Kol Yisrael arevim zeh la-zeh" - all Jews are responsible for one another.

When individuals and families find themselves confronted with problems they don't know how to resolve on their own, CJFS is there to provide confidential counseling and support. CJFS also promotes reaching out to those in need of special assistance - the elderly, the sick, the disabled, and the displaced. CJFS rallies community volunteers to augment its professional services; doing everything from visiting with the sick and elderly to hosting those who would otherwise have to celebrate Jewish holidays alone. We make a difference every day in the lives of our community's most vulnerable populations.

Through the confidential and compassionate help of CJFS, clients are helped and supported in many ways:

- Those with mental health challenges receive the counseling and support they need to live productive lives;
- Seniors have the opportunity to socialize, alleviate loneliness, get the managed care they need to remain in their homes;
- Individuals experiencing financial difficulties receive assistance to get them through a tough period;
- Those experiencing food insecurity have access to groceries;
- New parents are supported and provided resources to help them navigate this new phase of life;
- Families, individuals and seniors receive the case management they need to deal with life's challenges.

Our Legacy donors are individuals just like you who want to make sure that Charleston's most vulnerable populations receive the support they need now and in the future.  
Please join us!

Charleston Life & Legacy Case Statements

# Case Statement

- Reminds donor of your impact
- Shares vision
- Is positive, forward thinking and confident
- Is clear and concise
- Is a plan, not a revisiting of the past
- Is a reasoned argument for why the impact you have on individual's lives must continue

THE BEST WAY TO PREDICT  
THE FUTURE IS TO HELP  
CREATE IT.



# Case Statement

## What

- What ~~services~~ you provide
- How ~~many~~ you ~~serve~~
- ~~What~~ programs you run

I might like this, or I might not

## Why

- Why you do what you do
- Your values
- Your uniqueness
- Impact on your constituents
- Benefits of legacy gift on your community and your future

I also want that

# Case Statement

- ✓ **Who are you? What keeps campers coming back?**
- ✓ **What are your **core values** and how they are expressed?**
- ✓ **What is the **impact** of those core values on those you serve?**
- ✓ **Connect donor's values to camp**
- ✓ **Call to Action!**



# Sample Case Statement

*(edited)*

For close to 100 years, **Camp B'nai Brith of Montreal** has created magical and memorable summers for Jewish children and teens.

In a warm and supportive environment, we provides a unique and positive experience where **all campers live, learn and play** in a setting that **encourages personal growth and self-discovery**. **Campers are encouraged to try** new things physically, socially and emotionally. **Children learn new skills, make life-long friendships, build Jewish identity** and make memories to cherish for life. At camp, **children grow**, become independent, develop leadership skills and build confidence.

At camp, **campers are united** in spirit, cheer, song, sport, friendship and friendly competition, all while exploring their Jewish heritage and learning about themselves. **They leave feeling empowered and proud.**

*[Role, core values, impact]*



# Sample Case Statement



**Our Legacy donors are people like you,** who know that the magic of Jewish summer camp creates lifelong connections to campers' Jewish spirits. Our Legacy donors pledge to make this experience available to any Jewish child to attend. Our Legacy donors know that tomorrow's Jewish leaders come from today's campers.

*[Connects legacy donors to values of camp]*



**Please join us** in continuing our legacy by ensuring that future generations will forever be able to call CBB Montreal their summer home. Together we can keep the dream alive. Make your Legacy gift to Camp B'nai Brith today!

*[Call to action]*

# Group Discussion



What are the **CORE VALUES** of your camp?

What **IMPACT** do you have on your campers and their families?



Address the **Why**, not the **What**

# Legacy Plan Components



- Case Statement
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# Management Strategy

Who are the **members of your legacy team** and what are their **respective roles**?

**Be specific, who is the person(s) responsible for:**

- Legacy Plan implementation (Team Lead)
- Having conversations
- Thank you notes and thank you calls
- Tracking gifts, documents and records
- Submitting quarterly reports
- Overseeing marketing efforts
- Overseeing stewardship efforts
- Informing Board of Directors of progress



# Sample Management Strategy



**Camp Director** will meet with potential legacy donors

**Director of Development** will track and document progress, submit reports, send initial thank you notes, manage marketing and stewardship efforts, have conversations with potential legacy donors.

**Immediate Past President, Volunteer Team Lead**, hold team accountable, have conversations, assist in stewardship efforts

**Board member, Volunteer** have conversations, oversee stewardship efforts

**Board member, Volunteer, alum** have conversations, oversee marketing efforts, liaison w/Board

# Legacy Plan Components



- Case Statement
- Management Strategy
- **Target Audiences & Prospects**
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# Target Audiences & Prospects

**Looking For  
Prospects?**



# Target Audiences & Prospects

- **Individuals/families with connections to camp**

- Board members
- Past presidents
- Committee members
- Former board members
- Former staff



- **Individuals/families with certain giving patterns & history**

- Closest and most loyal donors
- Donors who have given consistently over 5 or more years
- Families who have sent their children to camp for 5 or more years



# Target Audiences & Prospects

- **Individuals/families with personal characteristics favoring legacy gifts**

- Seniors
- Those with few heirs
- Life transitions



- **Those who have experienced the impact camp has had on their friends and family members**

- Camper's parents
- Camper's grandparents
- Alumni



# Sample Target Audiences



- Legacy team members
- Current board members
- Multi-generational camp families
- Long-time camp families
- Alumni
- Current camp families



# Legacy Plan Components



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# Develop Your Marketing Plan

How will you advertise the concept of legacy giving to your camp family?



# Marketing



**Marketing =  
Israel's drip irrigation system**



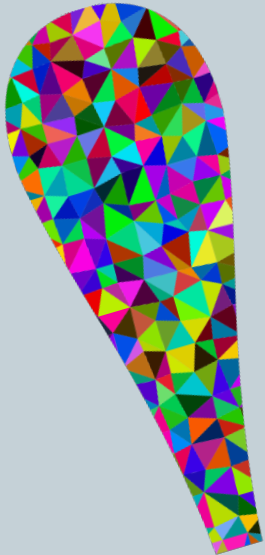
# What Marketing Tools Will You Utilize?

## How do you communicate with your camp family?

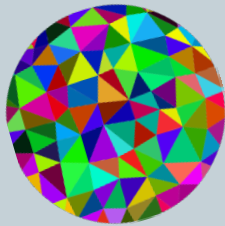
- Consider what you are already doing - weave legacy in
- Remember that **conversations are marketing** – each team member has one conversation per month
- What is quick, easy, and cost effective?
- Is there something you can start right now?



# Use the Tagline



**Be remembered forever by  
(Camp name) with a gift in your  
will, trust, retirement account, or  
life insurance policy**




**Stationery, envelopes, email signature with  
link, newsletters, email blasts, front page of  
website....EVERYWHERE**

# What Marketing Tools Will You Utilize?

- **Tagline** everywhere
- **Banners** at camp
- **Envelope stuffers**
- **Ads** or **articles** in print or email publications
- **Website**
- **Social media**
- **Announcements** and group **presentations**
- **Testimonials**
- **E-mail** messages
- **Other great ideas !**




*For four generations B.B. Camp has built Jewish identity in the Northwest.*



Etz Chaim Society honors those that have made a legacy gift commitment to support the long term future of B'nai Brith Camp.

*With your support we can ensure the sustainability and financial health of B'nai B'rith Camp.*

 **Etz Chaim Society**  
B'nai B'rith Camp

To learn more about joining the Etz Chaim Society:  
Michelle Koplan, Executive Director, 503.452.3444, mkoplan@oregonjcc.org

B'nai Brith Men's Camp congratulates Arlene & Harold for their much deserved honor.



# Exercise





**How can your organization weave Legacy into the way you already **communicate** with your donors/members to seamlessly integrate Legacy into your organization?**

Visuals in the Facility	Events / Meetings	Electronic	Mailings	Newsletter

Poster

Banner

Tent Cards

Brochure

Verbal

Materials

- ad
- listing
- testimonials
- brochure
- annual Report
- bookmark

Display

E-mail

E-newsletter

Social Media

Card

Flyer

Stuffer

Brochure

Ad

Listing

Testimonial

Story

# Legacy Plan Components

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# Develop your Stewardship Plan



**Appreciation, Gratitude, Keeps Engaged,  
Reminds Made a Good Investment**

# Why Stewardship?



- Strengthen your **relationship** with your legacy donors
- Keep them **engaged**
- Make them feel **appreciated**
- How often?
  - ❖ **As often as possible**
  - ❖ **As least quarterly**



# How will you steward your donors?



- What types of stewardship does your camp already do?
- Consider a variety of new ways you can **recognize and thank** those who step forward to leave a legacy gift.
- Some stewardship activities also serve as a way of **marketing legacy giving to the broader community.**
- Consider **creating a “society”** of legacy donors
- Ask for **donor stories/testimonials**- how will you use them?



# Stewardship



- Thank you note
- Phone call
- Cards- Birthday, Holiday  
Anniversary of legacy commitment
- Personalized letter
- Gifts
- Impact report

**CARE**  
Personal  
Connection /  
Share Impact

**SHARE**  
Donor  
Listings and  
Testimonials

- Newsletter
- Website
- Poster, digital display
- Annual report or event  
program

**Donor**

- Legacy Shabbat
- Gala or other special event
- Holiday programming

**HONOR**  
Recognition  
at gatherings

**INVITE**  
Special  
gathering

- Reception before “camp”  
gathering
- Invitation to event not  
open to general  
community

## Will you...

- Send a **personal note** within two days of receiving commitment?
- Make a **personal phone call** a week after receiving commitment?
- Hold an **event** specifically for legacy donors?
- Create a **Legacy society?**
- List **Legacy society members on website?**
- Send **cards created by campers?**



# Sample Stewardship Plan

## Care (personal touch) –

- Thank you **call** and **note** upon receipt of commitment (within 48 hours)
- Send **card** created by campers
- Personal phone call to invite to visit camp

## Share – (listings and testimonials)

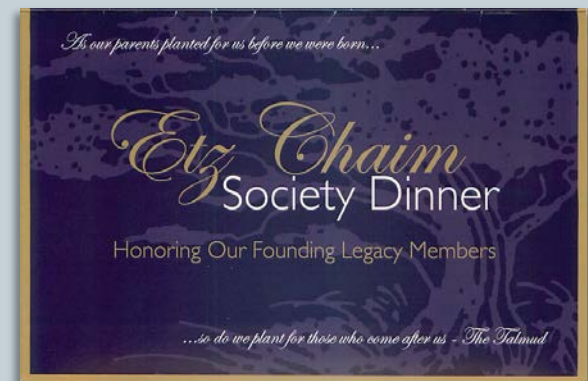
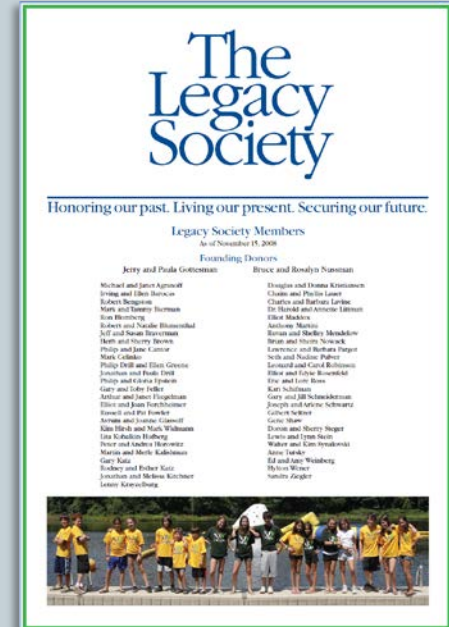
- **Create a Legacy Society** and list in e-newsletter
- Personal stories and **testimonials** of members posted on website, social media and published in e-newsletter

## Invite – (event specifically for legacy donors)

- To camp for shabbat or some other event

## Honor – (among your camp family)

- At annual gala
- On visiting day





# Legacy Plan Components

- Case Statement
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- Implementation Checklist



# Set Goals



# Set Goals



- **Make goals ambitious yet achievable**
- **Commit to each team member having one conversation per month**
- **Commit to obtaining signed Letters of Intent**  
Year 1: Minimum of 18 – strive for 25  
Year 2: Minimum of 18 – strive for 25



# Sample Goals



<u>Year 1</u>	<u>Goal</u>	<u>Stretch Goal</u>
Legacy team members	4	4
Board members	8	9
Multi-gen families	3	3
Long-time camp families	2	6
Alumni (40 yrs+)	1	3
<b>TOTAL</b>	<b>18</b>	<b>25</b>

<u>Year 2</u>		
Long-time camp families	6	11
Alumni (40+)	9	9
Current camp families	3	5
<b>TOTAL</b>	<b>18</b>	<b>25</b>

**Minimum total of 36 Legacy gifts in 2-year period**

# Rewards for Reaching Goals

## For Year 1

Minimum goal = 18 Commitments = **\$5,000**

Stretch goal = 25 Commitments = **+\$2,500**

**TOTAL INCENTIVE = \$7,500**

## For Year 2

Minimum goal = 18 Commitments = **\$5,000**

Stretch goal = 25 Commitments = **+\$2,500**

**TOTAL INCENTIVE = \$7,500**



# Legacy Plan Components



- Case Statement
- Management Strategy
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- Goals
- **Implementation Checklist**



# Implementation Checklist







# Sample Implementation Worksheet



Implementation	Feb	Mar	Apr	May	June	July
<b>Marketing - Tagline</b>	staff signatures		statements	membership renewal materials		statements
<b>Marketing - Materials</b>				Brochure Annual Meeting	stuffer in mailing of HHD ticket requests	
<b>Marketing - Display</b>			Banner			Listing
<b>Marketing - Announcements</b>				Annual meeting		
<b>Marketing - Newsletter</b>		article of acceptance and explanation	testimonial - Kaufman	ad		testimonial - Schiff
<b>Stewardship (personal-notes, calls, cards)</b>	thank you notes and calls ongoing		Passover card	call to invite to annual meeting		
<b>Stewardship (listings, testimonials)</b>			Kaufman in Newsletter	List for Annual Meeting		Schiff in Newsletter
<b>Trainings</b>		Conversation training			Meeting of Team Leaders	
<b>Team meetings</b>		assign prospects	Meet with Clergy to discuss HHD content	team meeting -	check in calls (new team members?)	team meeting
<b>Conversations</b>			4 conversation	4 conversations	4 conversations	4 conversations
<b>Group Presentations</b>			Board ask	Annual meeting	sisterhood	
<b>Board Meetings</b>		report on training	Board ask	listing in board packet	report on progress	listing in board packet
<b>Reporting deadlines</b>					Q 1 ends 6/30	report due 7/10

# Your “Homework”

- **Write Legacy Case Statement**
  - Make sure it communicates clearly and succinctly the emotional aspect of why donors should make a legacy commitment to your camp
- **Develop Management Strategy**
  - Decide who on your legacy team is going to be responsible for which aspects of the plan
- **Identify Target Audiences & Prospects**
  - Don't overlook your long-time donors/camp families at any giving level
- **Develop Marketing Plan**
  - Have a strategy for reaching people in a variety of ways
- **Develop Effective Stewardship Plan**
  - This is a critical component of a successful initiative
- **Set Goals**
  - Commit to achieving goals
- **Develop an Implementation Checklist**
  - Establish a time frame for accomplishing specific tasks

**Due to your camp  
LIFE & LEGACY  
Consultant as a  
Word document  
(not pdf) by  
November 25, 2020**

# Resources

[www.JewishLifeLegacy.org](http://www.JewishLifeLegacy.org)

Resources Tab

Username: **Resources**

Password: **hgflegacy**



# Resources



The screenshot shows the website's navigation and content structure. At the top left is the LIFE & LEGACY logo with the tagline "Assuring JEWISH TOMORROWS" and "A program of the HAROLD GRINSPOON FOUNDATION". At the top right is a search bar with a magnifying glass icon and a "SIGN OUT" link. A large red 'X' is drawn over the search bar. Below the search bar is a dark navigation bar with links: "About LIFE & LEGACY", "Bringing LIFE & LEGACY", "Your Community", "Annual Gathering", and "Resources". The "Resources" link is circled in red. Below the navigation bar is a breadcrumb trail: "Home / Resource Directory / Marketing". The "Marketing" link is circled in red. Two large orange arrows point from the "Marketing" link down to the "LIFE & LEGACY TEMPLATES" and "COMMUNITY & ORGANIZATION EXAMPLES" boxes. Below the breadcrumb trail are four content boxes: "LIFE & LEGACY TEMPLATES", "COMMUNITY & ORGANIZATION EXAMPLES", "HIGH HOLIDAYS", and "ARTICLES & REPORTS".

# Resources



## Life & Legacy Templates

TOP



MARKETING  
Bill Stuffer - Jewish Federation of Charlotte

MARKETING  
Bookmark - Temple Dor Dorim - Broward County

MARKETING  
Brochure - Temple Dor Dorim - Broward County

MARKETING  
LIFE & LEGACY - Legacy Marketing Checklist

MARKETING  
LIFE & LEGACY Ad Template - Aspects of Jewish Life

MARKETING  
LIFE & LEGACY Ad Template - Commit

MARKETING  
Postcard - Dayton

MARKETING  
Table Tent - JFS Louisville

MARKETING  
Using Video to Drip Market Legacy Giving - Jewish Federation of Greater Seattle

MORE MARKETING RESOURCES

Getting to the search engine

BOTTOM

### Life & Legacy Resources

SEARCH	TOPIC	TYPE
<input type="text" value="Enter Name or Keyword"/>	<input type="text" value="Marketing"/>	<input type="text" value="-All Types-"/>

[Clear filters]

# What's Next?



- ✓ **Set team meeting** to work on Legacy Plan
- ✓ **Legacy Plan due** to Legacy Consultant by **November 25**
- ✓ **Schedule monthly conference calls** with your Legacy Consultant/JCamp Mentor
- ✓ Schedule time to **review your legacy plan** (between December 14 and January 13)

# What's Next?



- ✓ **Attend Legacy Conversation training** in January  
Poll: Which day/time do you prefer?
- ✓ **Submit final legacy plan** to Legacy Consultant by **Jan. 30**
- ✓ **Secure Year 1 Legacy commitments**
- ✓ **Attend Marketing and Stewardship** training in May

# National Workshops

## Please join us for the following workshops

- **Nov 12, 7:30 pm EST**– *How to Incorporate the Legacy Conversation into Other Fundraising Conversations and Appeals* with Nanette Fridman
- **Dec 2, 7:30 pm EST**– *Asking Styles: Revolutionize Your Fundraising* with Brian Saber
- **January 14, 7:30 pm EST** – *Top 10 Legacy Fundraising Strategies from Science Research* with Russell James





# Important Note



S/he who **persuades**  
**and compels** others to  
give shall have a **reward**  
**greater than that of the**  
**giver** her/himself as it is  
said, “And the work of  
tzedakah shall be  
shalom.” *Isaiah 32:17*



# Q & A



What questions do you have for us?



LIFE &  
**LEGACY**  
FOR JCAMP 180



As my ancestors planted  
for me, so do I plant for  
my children

- *Taanit 23a*

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