

**Camp Legacy Program -Frequently Asked Questions**

January 2012

**Endowment Fund**

Do all donations that come from legacy gifts need to go into our endowment fund, or can we use some funds for other purposes (i.e. scholarship, capital)?

***It is highly recommended that all gifts that come to your organization from legacy/planned gifts go into your endowment fund.***

Do our endowment funds need to be managed by an outside Jewish organization?

***Yes, JCamp 180 must approve of the third party organization that you will establish relationships with to be the advisor and fiscal custodian of your endowment funds related to this program*.**

**Legacy Workplan**

Does JCamp 180 approve amendments to our Legacy Work Plan? ***yes***

What if we do not make our work plan goals; do we still get the $10,000 incentive grant for participating and making a good effort?

***No, you will only receive the $10,000 incentive grant for reaching your goals, unless your goals have been approved for time extensions or amendments.***

What if we get an immediate gift for our endowment (as opposed to a planned future gift) through the legacy program solicitation; does this count towards our goal? ***Yes.***

If a donor tells us that our camp is already in their estate planning, but we did not know this before the program, does this count towards our goal?

***Yes.***

How do our legacy solicitations synchronize with other fundraising activities?

***Consult your JCamp 180 mentor for specific strategies with your agency team; in most situations, the legacy ask is a good complement to other solicitations.***

Do we need to share our major donor prospect lists with other legacy teams? ***No.***

**Legacy Team**

What if every member of our legacy team does not make every training session and phone call?

***We understand that circumstances might arise that prevent team members from attending every session, but the serious intent and commitment must be there. If we recognize that a team member is truly not participating, we will discuss strategies to either engage or replace that member.***

How big should our legacy team be?

***Most successful agencies have a core team of 4-5 people, lay and professionals, as well as bring on other lay leaders as needed for prospect identification, outreach, and stewardship.***

Does each member of the legacy team need to make their own personal legacy gift?

***Absolutely, including the professional staff.***