



Best Practices from Camp Legacy Pilot Group - March, 2009

Ideas shared by the camp legacy teams in the pilot of the Grinspoon program. (URJ Eisner Crane

Lake, Kingswood, NJY Camps, Ramah Darom, Ramah Wisconsin, Tamarack Camps)

Marketing and Outreach to Prospective Legacy Donors

- Follow your Grinspoon plan!
- Simplify your message: legacy gifts will help scholarships, facilities and programs in the future: sign up for your passion!
- Know your donor: don't ask for annual/capital and legacy if you think it will confuse the issues, but do the integrated ask if you think that they would appreciate the efficiency
- Create a well-designed, clean and simple legacy brochure
- Reach out to:
 - o founders of camp
 - o those who already have named endowments
 - o older and long-time staff or former staff to camp
 - o long-time rabbis, other educators, doctors and nurses
 - o parents of alumni
- Include a box for "interested in legacy and planned gifts" on:
 - o Alumni and parent surveys
 - o Annual gift letter
 - o On your website
 - o Make sure you follow up quickly on the leads and set up personal meetings
- At public meetings (board meetings, alumni gatherings, visitors day) ask the whole group to raise their hand if they already put camp in their wills
- Include legacy society testimonials and photos on your website and on your e-newsletter.
Make sure it is prominent and not "hidden"
- Use personal stories/testimonials verbally at gatherings: and use the Grinspoon legacy goals as a challenge and a numeric goal to hit
- Remind prospects that the Jewish people have survived thousands of years (through the Roman Empire, the Holocaust) and that the camps have survived decades (through the great depression and WWII) and that the legacy pledge is a part of this continuity
- Legacy pledge is the "dessert" - the sweetness at the end of the meal; or it is the afikomen to the Pesach seder – the hope for redemption and the affirmation of the future

Ways to Steward and Appreciate Donors

- Make a plan and USE YOUR DATA BASE for regular contact: cards, emails, updates, personal invites to events

- Honor legacy donors by giving them an aliyah during Shabbat services
- Feature testimonials in:
 - Newsletters
 - Website
 - annual report
- Create physical recognition at camp:
 - book of life
 - legacy wall – plaques and artwork
 - legacy walkway – bricks
 - legacy tress planted
- Provide thank you gifts upon receiving pledges
 - Leather portfolio
 - Challah covers
 - Mezuzahs
 - Artwork from campers
- Publicly honor legacy donors at:
 - Annual meeting
 - Alumni event
 - Board meeting
 - Visitors day

Best Methods to Engage Boards and Lay Leaders

- Get a third party (Federation executive, Grinspoon mentor etc) to present the legacy case to your board
- Tap your past board chairs as honorary chairs of legacy efforts
- Remind them that board members are part of a big family which includes alumni, campers, parents, staff and the legacy pledge is “taking care of that family”
- Use pie charts in board presentations to show % of board, alumni and staff giving

Stories of “surprising” Legacy Pledges

40 year old rabbi who came up to camp to teach with his family – we had not planned to ask him and he saw the brochure on the table and made his legacy pledge unsolicited.

Don't forget the younger, dedicated people!

Camp director was talking to an old friend about new stuff happening at camp and mentioned the legacy program; the friend, who was a \$36/year donor, told the camp director that he would certainly make a legacy pledge. The camp director was surprised. He had not planned on asking this person. Always keep in mind that the most loyal friends are legacy prospects

Major donor made a legacy gift to endow the building that his capital gift made possible

Lost a major capital gift due to the economy, but stayed in touch with the donor and boosted annual gift instead, peaking the interest for a future legacy pledge.

□ One longtime doctor at camp got the legacy “buzz” and proceeded to approach every other medical professional (docs, nurses etc) and asked for legacy pledge from each