**Tips for having a Legacy conversation with a group of board members**

**JCamp 180 Camp Legacy Program**

**Tips from February 2018 Webinar: “Art of the Legacy Ask”**

1. **What it is:** Remind them of your Camp’s Legacy Society, what it is, when it started, and how it was inspired by the Harold Grinspoon Foundation’s Legacy program.
2. Remind them of what is unique about your organization and the value it provides to Camp. Describe how a legacy commitment will help sustain the organization for future generations and that it is the role of current leadership to serve as role models for the rest of your constituency.
3. Explain that joining the Legacy Society can be done either by letting Camp know how they’ve already formalized a commitment for an after-life gift to camp or by signing a “Letter of Intent” which is a promise to formalize a commitment sometime in the future. An after-life gift is most commonly included in a bequest, life insurance or IRA designation.
4. Distribute a copy of the letter of intent and the Legacy Brochure for them to review; walk them through it so they see how simple it is.
5. **What Board Members are expected to do:** Every Board member is expected to think about joining the Legacy Society and is invited to have a personal conversation about it. There is no pressure to join.
6. Board members are expected to support the integration of legacy giving into the philanthropic culture of Camp. This includes a willingness to get training on ways to talk to other supporters whom you think might be interested in joining the Legacy Society.
7. **Next Steps:** Offer to meet with each of them individually to discuss their specific legacy commitment at a time and place that is convenient for them. Make sure to share your contact information.
8. Thank them for their time and commitment to the legacy program.
9. Following the meeting, try to set up some appointments – if you are present for the full meeting, try to do so at the end of the meeting. If not, make some follow-up phone calls. Even if some members of the board will sign the letters and return to you that evening, it is helpful to follow-up with a conversation.