



CAMP LEGACY WORKBOOK

Jcamp180™
From STRENGTH
to STRENGTH 
A Program of the Harold Grinspoon Foundation



Step 1: The Case for Becoming a Legacy Member

The “case statement” is a resource (such as a flier or brochure) to share with folks who dearly love camp and who, if they knew about your Legacy society, might be motivated to join. The case statement is at the heart of your Legacy action plan.

Take a look at the case statements created by other camps. You are encouraged to adopt the best elements you see among them and make it your own. Take the time to try to improve upon what you see. When reviewing the samples, look for these best practices:

- It contains warm and personal feelings: The case statement should speak directly to a potential legacy participant and not at them in some abstract manor.
- It provides the feeling of a real fondness for camp: Both the words and images through the document should invoke these feelings.
- It conveys why making a commitment to join the Legacy Society is a wonderful way to express one’s love and support for camp. The reader should immediately understand the enduring benefits of this program.
- It answers the questions “Why this institution? Why now? Why me? How?”
- Overall, it should be clear, concise, and easy to read and understand.

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

Case Statement Topic	Questions to address
History and current situation	<ul style="list-style-type: none"> - 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.)?
Vision for the future	<ul style="list-style-type: none"> - What is leadership’s 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 the vision is realized?
How a Legacy participant will make the vision for the camp’s future a reality	<ul style="list-style-type: none"> - How can a Legacy participant support this future? - What difference will it make? - What will happen with each Legacy donation? - Who can join? - What must one do to become a Legacy member? (Share some examples of will, insurance policy) - What are the benefits of joining? -Where can one get more information?

Case Statement Workspace

Step 1: Discuss and plan out the following tasks to complete a Case Statement and supporting documents:

Task	Notes	Who will work on it? By when?
Review sample Case Statements from other camps to get ideas		
Borrow, draft, edit your own		
Camp photos (look for high quality mix of current and past images that are emotional or tell a story)		
Name your Legacy Program (Hebrew names can confuse)		
Create a Logo, and tag line		
Find Graphic designer Printing budget (Print in small batches)		
Review Letters of Intent from other camps		
Produce your Letter of Intent		
Other		
Expected Completion Date		

Step 2: Who will you invite to join the Legacy program?

Anyone of any age and any stage of life is welcome to join your Legacy Society. You are inviting them to sign a “letter of intent” indicating that they will (soon we hope) formalize a plan to provide a financial gift to the camp after they die (which we hope will be a very, very long time from now). Most Americans do not realize that their assets are worth more than they think they are worth. So, on average, a bequest gift is a more generous than someone is likely to contribute to an organization if they had given a little bit every year during their life-time.

Young, old, rich, poor – everyone is welcome to join your Legacy program. The only criteria for a Legacy member are their deep love and connection to camp.

Current board members: The board should understand that they must be a model for potential legacy donors. Review the list of board members to prioritize those with the longest relationship and deepest feelings for the camp. 100% should be invited to join, but the decision is a personal one, and there should be no pressure to join!

Long-term volunteer leadership: Former board members and volunteers are natural Legacy participants. Volunteers involved in board leadership, alumni activities, annual fund leadership, capital campaign structure or recruitment and service volunteers should be approached. These volunteers not only understand your role in the community – they are already committed to it.

Multi-year annual fund donors: Use your donor database to identify donors who have made gifts for five or more years at any gift level. Isolate the top 10 percent with the most consistent giving history. These are wonderful friends with whom to have the Legacy conversation about camp. These individuals have already shown a commitment to camp and should be eager to sustain that commitment.

Major gift donors: Focus on major gift donors who have other relationships (board service, volunteer service) for initial calls. These donors may appreciate your efforts to plan for camp’s future.

Staff: Do not overlook current and former long-term staff. Include staff such as rabbis, nurses and doctors even if they’ve only worked part of each summer. Their gifts make a statement about the universal nature of legacy participation, and reinforce the concept that you do not have to be wealthy to make a significant contribution!

Alumni: Approach those alumni who either loyally organize and or faithfully attend reunions and alumni events, as well as the social connectors on Facebook etc. They will appreciate the invitation.

Recall that the people who are most likely going to enjoy having a conversation with you about Legacy:

- Already have warm feelings for camp
- Are loyal donors who can have always responded when called upon to help financially
- Are individuals who have a stake in the future of the camp (alumni, parents, grandparents)
- People who have served in a leadership position in the camp (Board or Camp committee members, past board members, alumni, staff and former staff, parents, loyal donors).

Special Note:

One small camp had an “army” of young Alumni quickly join the Legacy Society to inspire older generations to follow their example. They helped spread the word, “Here’s what I’m doing. What can you do?”

Step 3: How will people learn about the Legacy Society?

The Legacy society is important to your camp's future. Implementing a marketing and outreach plan for your Legacy program will ensure that everyone who loves camp is aware of the program and feels welcome to join.

Marketing for Legacy works best when it is:

- **Evocative and Emotional** of fond memories of camp: Sharing stories from other Legacy members can help you convey the emotional power of this program.
- **Consistent in look and message:** Maintain a single look across all marketing and communications (e.g.: the same logo in a mailing, in the e-newsletter, and on the donor recognition wall at camp)
- **Frequent:** Every camp communication should mention Legacy. People only read information when it is important to them. Readers should always be able to say, "I just saw your Legacy information in the newsletter. How great! Did you just start this?"
- **Human:** Stories are more motivating than all the facts and figures! At every opportunity include personal stories of those who have joined.
- **Personal:** Personalized whenever possible

Group Presentations: They best way to "get the word out" about your Legacy program is to talk to others, individually and in groups. Although many people dislike public speaking it is the most effective, and necessary, component of this program. Presentations should share your story about why you are participating, and invite people to join you. Take some time to identify the large and small groups that would allow you to speak for 10 minutes about the program. Remember that this isn't a fundraising pitch – you're asking for a commitment now for a future gift. People won't be offended to hear about this program.

Special Note:

We encourage you to take the time to review all the camp's marketing and communications materials for opportunities to share Legacy messages and materials. This review may lead to an improvement in the overall communications strategy for alumni outreach and engagement.

Marketing Plan Workspace

Step 3: Take 15 minutes to brainstorm different places to market your Legacy Society.

Type of Marketing	Yes/No/Other idea	Who will implement? What needs to be created?
Develop a Legacy "literature packet"		
Update web page to include Legacy		
Include Legacy in camp e-Newsletters (Once, every time, or a few times a year?)		
Include in camp print newsletter		
Include in visitor's day at camp		
Include at Camp events like anniversary events, galas, golf-outings, reunions (a table, poster, announcements)		
Included in donor information for other campaigns such as capital or annual campaigns?		
A dedicated mailing to older alumni or loyal donors		
Design/ purchase ribbons or stickers that Legacy members wear at special events		
A poster up at camp in the welcome center		
Group meetings, house parties, small alumni gatherings		
Video of Legacy members and why they joined		
Others (from the JCamp 180 Knowledge center or reporting)		
Other:		

Step 4: How will your members feel special?

As soon as someone signs a “Letter of Intent” they become members of your Legacy Society. Take the time to welcome them and make them feel wonderful for joining.

Properly thanking your members is the most important job of your Legacy team’s work. How you make people feel about their choice to participate will be the difference between people who just sign a letter and forget about it, and people who follow-up and make a plan that is generous and lasting.

You have two important tasks:

1. **Thanking:** You must thank people quickly, personally, and generously after they sign their **Letter of Intent**. Your goal is to make this thank you exceed their expectations. It should delight and excite. Wow your members with a thoughtful letter and a wonderful gift.

Letters: You MUST send a letter. It should be on camp stationery and personally signed by the Camp Director AND a Legacy team member. Even if the letter is typed, a hand written added “thank you” is essential.

Gifts: Many camps are recognizing Legacy donors with unique gifts – the kind of gift that makes others take notice and ask about the program.

Others: What other ways can you think of to say “Thank you” to someone who has made a Legacy commitment?

2. **Stewardship:** The Legacy Society is a lifetime membership ONLY as long as they feel engaged with camp. These individuals will encounter many life changes from now until their death, and it is important to assure that today’s commitment to camp remains in place over time. Stewardship is taking the steps to assure that 10, 20, or even more years from now, a Legacy society member keeps your camp in their will as it is being re-written for the 2nd, 3rd or 4th time. You can ensure this lifetime commitment by keeping your members engaged and recognized. Successful Legacy stewardship that lasts for decades is a result of:

- 1.) Careful planning of Legacy stewardship activities and
- 2.) Proper care and use of your camp’s donor database for Legacy

Special Note:

Meaningful and consistent stewardship of camp Legacy members has improved people’s motivation to give annual contributions to camp.

Stewardship Plan Workspace

Step 4: Discuss and brainstorm your Stewardship plan

Type of Stewardship	Examples from other camps	Yes/no/maybe: What will we do?
Written communications	<ul style="list-style-type: none"> ▪ Annual Legacy/Donor updates ▪ Summer highlights page with photos ▪ Newsletters 	
Listing of member names at EVERY opportunity	<ul style="list-style-type: none"> ▪ Website ▪ Annual reports / Donor reports ▪ Camp bulletin ▪ Every published donor recognition list ▪ Visitors' Day book ▪ Every Gala tribute journal 	
Hand-written cards/notes	<ul style="list-style-type: none"> ▪ Customized New Year's & Hanukkah cards ▪ Camper-made cards ▪ Camper postcard from summer ▪ Camper-made newspaper ▪ Birthday cards 	
Legacy "articles"	<ul style="list-style-type: none"> ▪ Newsletters ▪ Website ▪ Blog 	
Gifts	<ul style="list-style-type: none"> ▪ Mezuzah ▪ Glass blown Honey dish ▪ Framed art from Camp alum ▪ Sapling / flower pot with seedling ▪ Shalach Manos (Purim) 	
Legacy Events at Camp	<ul style="list-style-type: none"> ▪ Summer dedication ceremony ▪ Celebration dinner ▪ Shabbat dinner ▪ Lunch or dinner at camp ▪ Special Legacy name tag badges at Camp events 	
Legacy Events in the community	<ul style="list-style-type: none"> ▪ Event at area restaurant for members ▪ Song festival ▪ Alumni reunion 	
Physical Recognition	<ul style="list-style-type: none"> ▪ A permanent edifice: wall plaques, tree, etc. ▪ A living honor site: garden with plaques, etc. ▪ Consider a duplicate location outside of camp 	
Personal Phone Calls	<ul style="list-style-type: none"> ▪ Thanked by a board member upon signing LOI ▪ Ask how to list names for recognition purposes ▪ Engage on what's important and vision/purpose for future gift ▪ Confirmation of estate plan status ▪ Personal invitations to Camp for events 	
Personal Meetings	<ul style="list-style-type: none"> ▪ One-on-one conversations ▪ One-on-one to finalize commitments ▪ Delivering welcome/thank you ▪ Holiday greetings (Rosh Hashanah, Hanukkah) 	
Testimonials	<ul style="list-style-type: none"> ▪ Feature member stories in newsletters ▪ Donor quotes / testimonials on website ▪ Sharing personal stories in Legacy Book ▪ Online Legacy film 	
Other Ideas		

Step 5: Who is going to run your Legacy Program?

Developing, implementing and coordinating a Legacy program requires the team work of camp staff and volunteers. This program cannot be successful if left to either group alone. The JCamp 180 Legacy program has shown that all kinds of camps, large and small, young and established, staff driven or volunteer led have been and can be successful with this program. It is essential that you take time now to clarify the roles and responsibilities of the members of your Legacy Team in order to avoid pit-falls and future miscommunication.

Camp Staff can't do all the work – they don't have time. Volunteers should not be maintaining the donor database – it isn't sustainable. The most successful programs rely on a balance of staff and volunteer energy and commitment.

Here are some general guidelines to help you with your planning:

- Your Legacy team should have four members, with at least one staff member included and at least two volunteers. It can be larger.
- Camp staff should maintain the donor database, and modifying the database to include Legacy information. Contact Kevin Martone or visit our Knowledge Center for technology assistance.
- Your Legacy team will benefit from having a job description. This will help you recruit new members to your committee in the future
- Legacy teams can have ad-hoc members who help with specialized activities (asks, help with organizing Legacy social events, or the design of your gift). Not everyone has to be involved with all parts of the work.
- There MUST be a chair of the team who is mindful of all the moving parts, and the requirement of the program in your first three years.
- Agree and document in advance who is going to do what. Legacy team members should be comfortable holding one another accountable for getting the work done.
- Regular meetings should be held throughout the year. A key agenda item for each meeting is to document progress against prior goals, both in program development and conversations held. Make your commitments visible to the entire each month, it encourages progress and minimizes resentments from building up. Expect your JCamp 180 mentor to play the role of “gentle nudge”
- Camps that get an early start on planning the program have more time for conversations with potential members and feel more successful.

Special Note:

“A pure pleasure,” reports one volunteer about his experience talking to people about Legacy. Many people report that Legacy conversations are the easiest “ask” because you are not asking for money. Instead you are connecting to people who love camp and inviting them to join you in support of camp. To join they need only sign a “letter of intent” and make a future commitment.

“Who Does What” Plan Workspace

Step5: Discuss the roles and responsibilities of the Legacy Team Leadership

Task: Who will take the lead on:	Name	Volunteer or Staff?	Are they primary or secondary?	Committee Approval Needed?
Filling out this form:	Jeff Goldsmith Beth Schwartz	Volunteer Volunteer	Primary Secondary	No
Chairing the Legacy Team				
Creating Case Statement				
Creating the Logo				
Creating the Letter of Intent				
Creating other marketing materials and the Legacy “Packet”				
Creating the special Thank You gift, and making sure it can be mailed or delivered				
Creating list of people to talk to about joining the Legacy Society, keeping track of progress towards the first 25 LOI for 2014				
Creating a Legacy event or special recognition for members				
Updating your donor database to identify Legacy members and maintaining the database				
Reviewing communication materials and including Legacy information				
Making Legacy presentations to large and small gatherings (like Board meetings or Alumni Reunions)				
Writing and submitting JCamp 180 Legacy reports				
Creating a job description for the Legacy Team and documenting the work you must do for this program				
Other Task?				

Step 6: Create a calendar of all Legacy activities

Step 6: Create a Legacy plan the year. See Sample Plans for additional ideas

Month	Tasks	1 st year only, or repeat each year?
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		
Year 2		
Year 3		
Year 4		

Step 7: Commit yourself to measurable goals

We require you to submit regular updates and reports on your progress in the Legacy Program. You can find a copy of the Legacy reports and due dates in your handouts.

\$25,000 and an opportunity to get Harold's LOI for your camp

If you succeed in enrolling 25 members in your first year, the Harold Grinspoon Foundation will provide you an incentive grant of \$10,000.

If you succeed in enrolling another 25 members (for a total of 50 members) by the end of your second year, the Harold Grinspoon Foundation will provide you an incentive grant of an additional \$10,000.

If you succeed in enrolling an additional 18 members (for a total of 68 members) by the end of your third year, the Harold Grinspoon Foundation will provide you an incentive grant of \$5,000.

You will have the opportunity to solicit Harold Grinspoon's personal LOI for your camp at our annual conference during your first two years. Yes, this LOI counts toward your goal.

Additional requirements include:

1. Submission of regular reports on time (see website for forms and dates)
2. Submission of copies of all your LOI (see website for instructions)
3. Annual attendance at the JCamp 180 Conference each November for your Legacy Team members for further training, sharing of resources, and learning (see website for conference information and registration) This conference is free and a travel stipend is available
4. Camp remains in good standing with JCamp 180, and renews annually with the Harold Grinspoon Foundation.

Step 7: GOAL SETTING: Review the Goals for your team this year (through 2019)

Goal	Required minimum	Your Team's Goals
Number of LOI	25	
Number of one-on-one conversations about joining	30	
Number of group presentations	Large (>5) groups: 2 Small groups: 4	
Other Goals		



For more resources and materials to support your Camp Legacy Program,
please see our on-line Knowledge Center at: <https://jcamp180.org/knowledge-center/legacy>

“The Camp Legacy Initiative was a true gift to our camp. We so desperately needed a nest egg for our future and needed direction and guidance on how to achieve that goal. Without the Harold Grinspoon Foundation we would have never accomplished this in such a professional way.”

- Rivkie Lafer, Chair, Camp Moshava of Wild Rose Wisconsin