



Initial Board Presentation

1. Start by asking each of your board members (if small board) or a few (if large board) why they have chosen to give their time, energy and financial resources to your organization.
2. Remind them of your organization's participation in the LIFE & LEGACY® program sponsored by the Federation/Jewish Community Foundation and the Harold Grinspoon Foundation.
3. Explain that as part of your participation in this unique program, you will receive training and support to integrate legacy giving into the philanthropic culture of your organization.
4. Additionally, share with them that you have the opportunity to obtain a \$----- incentive grant if you secure a minimum of 18 legacy commitments each year for the next two years so you are reaching out to the board to begin to provide momentum for this effort.
5. Explain that a legacy commitment can either be a formalized commitment they have already made in their estate plan that they have not notified your organization of to date or a promise to formalize a commitment (possibly a bequest, life insurance or IRA designation) sometime in the coming year.
6. Distribute a copy of the letter of intent and walk them through it so they see how simple it is.
7. Remind them of their current commitment to the organization as represented by their leadership at the board level.
8. 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.
9. Share with them your reasons for making a legacy commitment and invite them to join you.
10. 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.
11. Thank them for their time and commitment to the legacy program.
12. Tell them you look forward to hearing from each of them and to reporting at future board meetings on the success of this initiative as you work toward securing the future of your organization and obtaining the incentive grant.
13. Following the meeting, try to set up some appointments – if you are present for the full meeting, try to do so before you leave. If not, make some follow-up phone calls. Hopefully some members of the board will sign the letters and return to you that evening.