Legacy Donor Prospects

Look for those individuals who are most connected, and most passionate about your organization and its mission. This is NOT a major donor campaign. Of course, you will want to include major donors, but the best legacy prospects are your most loyal supporters regardless of the dollar amount they have given. The best prospects are:

- ✓ **Current board members:** The board should know at the outset that they should model for other potential legacy donors. Review the list of board members to prioritize those with the longest relationship and most involvement with the nonprofit.
- ✓ **Long-term volunteer leadership** (former board members and volunteers): You have volunteers involved in board leadership, alumni activities, annual fund leadership, capital campaign structure or recruitment and service volunteers. These volunteers not only understand your role in the community – they are committed to it.
- ✓ **Multi-year annual fund donors**: Use the donor database to identify donors who have made gifts for five or more years at any gift level. Isolate the top 10 percent of the donor base with the most consistent giving history.
- ✓ **Major gift donors:** Focus on major gift donors who have other relationships (board service, volunteer service) for initial calls. These donors may serve as leaders for others in the donor pool.
- ✓ **Staff:** Do not overlook current long-term and former staff. Include part-time but perennial staff such as rabbis, nurses and doctors. Staff are generally extremely committed and passionate about your mission. 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 have been most organizing and attending reunions and alumni events, as well as the social connectors on facebook etc.,

Once you have identified individuals from each of the categories above, you want to create a legacy donor profile for each legacy prospect. This information could already be in the donor database. If not, make sure that it gets entered into the database through the legacy action plan. For each legacy prospect, you should have information for most of the following:

- Name, address, contact information
- Connection and involvement to your organization: alumni year, staff year, board service year etc.
- Family connections: adult children, young children, grand children, cousins, siblings
- Life Cycle events: births, bnai mitzvoth, marriages as well as divorce, illness, death in family
- Family involvement in your organization: other family involved now or who have been involved in the past generations or have benefitted from your organization
- Giving history to your organization
- Wealth capacity: employment, home ownership, vacation homes, car, giving history to other charities
- Your best contact – the person close to you and your leadership team with the closest personal connection makes the best sense to have a conversation with this individual