

Your work changes the organizational culture

Legacy giving is for people who believe in the mission of your organization and want to ensure it continues to impact the lives of community members for generations to come. Legacy donors are making a value-based commitment to your organization, thus creating a deeper connection. As their commitment deepens and permeates the organization, your culture will change from one of raising dollars to creating a philanthropic partnership so that together, more can be achieved.



Changing a culture takes time, resources, effort and persistence. Your effort, as a member of the legacy team, is what makes it possible. **Thank you!**

For resources and samples from HGF and LIFE & LEGACY Partner communities, visit

www.jewishlifelegacy.org

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Legacy Team Guide



*Thank you for your commitment to securing the future of your Jewish community. You are part of a national network of individuals, professionals and lay leaders, who want to ensure there are vibrant and strong Jewish communities of all sizes across North America. **This guide is intended to give you an overview of the critical role you play, as a legacy team member, in making this a reality.***

You are part of a TEAM effort

You are not alone! Dedicated volunteers and professionals from your organization are working together to identify potential legacy donors, get the word out, have conversations and steward legacy donors. On a communal level, your local legacy coordinator is working to ensure that this community-wide initiative is a success and they are available to help **you and your team** stay on track.



You have a unique role

Each person on the team adds something special to the overall effort. You might be great at writing personal thank you notes, engaging people in conversation, sharing technical expertise about planned giving or fund raising, generating ideas to spread the word about legacy giving, keeping your team organized and moving forward, or many other skills that will result in securing legacy commitments for your organization and effectively stewarding donors.

Rather than feel you have to do everything yourself, identify what your unique contribution can be and offer



You are an ambassador

Marketing legacy giving is about educating donors. The idea that a donor can do something meaningful for an organization they love without writing a check today is a message that needs to be constantly **repeated**, in different forms and across multiple platforms, to be effective.

Share the legacy message with everyone you run into. Use every marketing tool available to your organization to get the message out to your constituents.

Sharing your reasons for making a legacy gift will be a powerful motivator for others. Anyone can make a legacy gift!

You are a champion

Having **one-on-one conversations** with your friends and others who care deeply about your organization is the best way to secure legacy gifts. People are motivated to make a legacy gift when they understand what it is, how their gift enables the organization to continue impacting future generations and when they are personally invited to participate.

Conversations should be thoughtful and intentional. Over the course of the conversation, you will **encourage** the donor to reflect on their connection to your organization, **listen** to understand what the organization means in their life, **share** your own story, and **invite** them to join you in making a legacy gift to secure the future of your organization and your Jewish community.

When you and your fellow team members each commit to **one conversation per month**, you will keep the team moving forward to reach your goals, and set up a process that is sustainable over time.



You are a steward

Personally **thanking** your legacy donor immediately after having a conversation and when they make a legacy commitment are the first steps in demonstrating their importance to your organization.

Other stewardship activities throughout the year will keep a donor connected to your organization, feeling appreciated and good about their investment. Consider both personal and public stewardship that shows your gratitude for their commitment throughout the year.

Every donor is **unique**. Find out what each donor appreciates and do more of that.