As my ancestors planted for me, so do I plant for my children

- Taanit 23a

Writing Your Legacy Plan

Harold Grinspoon Foundation – October 2020
Why Plan?

A Legacy Plan provides the road map for your successful journey in achieving after lifetime gifts from those who are passionate about your camp.
Legacy Plan Components

- Case Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing
- Stewardship
- Goals
- Implementation Checklist
Case Statement

- Will be used as a one-page leave-behind after conversations
- Gives your Legacy team common language for their conversations
- Language can be used in marketing materials
Case Statement

- Reminds donor of your impact
- Shares vision
- Is positive, forward thinking and confident
- Is clear and concise
- Is a plan, not a revisiting of the past
- Is a reasoned argument for why the impact you have on individual’s lives must continue
Case Statement

**What**
- What services you provide
- How many you serve
- What programs you run

**Why**
- Why you do what you do
- Your values
- Your uniqueness
- Impact on your constituents
- Benefits of legacy gift on your community and your future

I might like this, or I might not
I also want that
✓ Who are you? What keeps campers coming back?

✓ What are your core values and how they are expressed?

✓ What is the impact of those core values on those you serve?

✓ Connect donor’s values to camp

✓ Call to Action!
For close to 100 years, **Camp B’nai Brith of Montreal** has created magical and memorable summers for Jewish children and teens.

In a warm and supportive environment, we provide a unique and positive experience where all campers live, learn and play in a setting that encourages personal growth and self-discovery. Campers are encouraged to try new things physically, socially and emotionally. Children learn new skills, make life-long friendships, build Jewish identity and make memories to cherish for life. At camp, children grow, become independent, develop leadership skills and build confidence.

At camp, campers are united in spirit, cheer, song, sport, friendship and friendly competition, all while exploring their Jewish heritage and learning about themselves. They leave feeling empowered and proud.

[Role, core values, impact]
Sample Case Statement

Our Legacy donors are people like you, who know that the magic of Jewish summer camp creates lifelong connections to campers’ Jewish spirits. Our Legacy donors pledge to make this experience available to any Jewish child to attend. Our Legacy donors know that tomorrow’s Jewish leaders come from today’s campers. [Connects legacy donors to values of camp]

Please join us in continuing our legacy by ensuring that future generations will forever be able to call CBB Montreal their summer home. Together we can keep the dream alive. Make your Legacy gift to Camp B’nai Brith today! [Call to action]
Group Discussion

What are the **CORE VALUES** of your camp?

What **IMPACT** do you have on your campers and their families?

Address the *Why*, not the *What*
Legacy Plan Components

- Case Statement
- **Management Strategy**
- Target Audiences & Prospects
- Marketing
- Stewardship
- Goals
- Implementation Checklist
Management Strategy

Who are the **members of your legacy team** and what are their **respective roles**?

**Be specific, who is the person(s) responsible for:**

- Legacy Plan implementation (Team Lead)
- Having conversations
- Thank you notes and thank you calls
- Tracking gifts, documents and records
- Submitting quarterly reports
- Overseeing marketing efforts
- Overseeing stewardship efforts
- Informing Board of Directors of progress
Camp Director will meet with potential legacy donors

Director of Development will track and document progress, submit reports, send initial thank you notes, manage marketing and stewardship efforts, have conversations with potential legacy donors.

Immediate Past President, Volunteer Team Lead, hold team accountable, have conversations, assist in stewardship efforts

Board member, Volunteer have conversations, oversee stewardship efforts

Board member, Volunteer, alum have conversations, oversee marketing efforts, liaison w/Board
Legacy Plan Components

- Case Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing
- Stewardship
- Goals
- Implementation Checklist
Target Audiences & Prospects

Looking For Prospects?
Target Audiences & Prospects

- **Individuals/families with connections to camp**
  - Board members
  - Past presidents
  - Committee members
  - Former board members
  - Former staff

- **Individuals/families with certain giving patterns & history**
  - Closest and most loyal donors
  - Donors who have given consistently over 5 or more years
  - Families who have sent their children to camp for 5 or more years
Target Audiences & Prospects

- **Individuals/families with personal characteristics favoring legacy gifts**
  - Seniors
  - Those with few heirs
  - Life transitions

- **Those who have experienced the impact camp has had on their friends and family members**
  - Camper’s parents
  - Camper’s grandparents
  - Alumni
Sample
Target Audiences

- Legacy team members
- Current board members
- Multi-generational camp families
- Long-time camp families
- Alumni
- Current camp families
Legacy Plan Components

- Case Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing
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- Goals
- Implementation Checklist
How will you advertise the concept of legacy giving to your camp family?
Marketing

Marketing = Israel’s drip irrigation system
What Marketing Tools Will You Utilize?

How do you communicate with your camp family?

- Consider what you are already doing - weave legacy in

- Remember that conversations are marketing – each team member has one conversation per month

- What is quick, easy, and cost effective?

- Is there something you can start right now?
Use the Tagline

Be remembered forever by (Camp name) with a gift in your will, trust, retirement account, or life insurance policy

Stationery, envelopes, email signature with link, newsletters, email blasts, front page of website….EVERYWHERE
What Marketing Tools Will You Utilize?

• Tagline everywhere
• Banners at camp
• Envelope stuffers
• Ads or articles in print or email publications
• Website
• Social media
• Announcements and group presentations
• Testimonials
• E-mail messages
• Other great ideas!
Exercise

How can your organization weave Legacy into the way you already communicate with your donors/members to seemlessly integrate Legacy into your organization?

<table>
<thead>
<tr>
<th>Visuals in the Facility</th>
<th>Events / Meetings</th>
<th>Electronic</th>
<th>Mailings</th>
<th>Newsletter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

**Poster**
- Verbal Materials
  - ad
  - listing
  - testimonials
  - brochure
  - annual Report
  - bookmark

**Banner**
- Display
  - E-mail
  - E-newsletter

**Tent Cards**
- Card
  - Flyer
  - Stuffer

**Brochure**
- Ad
  - Listing
  - Testimonial

**Social Media**
- Story
Legacy Plan
Components

• Case Statement
• Management Strategy
• Target Audiences & Prospects
• Marketing

• Stewardship

• Goals

• Implementation Checklist
Develop your Stewardship Plan

Appreciation, Gratitude, Keeps Engaged, Reminds Made a Good Investment
Why Stewardship?

- Strengthen your *relationship* with your legacy donors
- Keep them *engaged*
- Make them feel *appreciated*
- How often?
  - As often as possible
  - As least quarterly
How will you steward your donors?

- What types of stewardship does your camp already do?

- Consider a variety of new ways you can recognize and thank those who step forward to leave a legacy gift.

- Some stewardship activities also serve as a way of marketing legacy giving to the broader community.

- Consider creating a “society” of legacy donors

- Ask for donor stories/testimonials - how will you use them?
Stewardship

**CARE**
- Personal Connection / Share Impact
- Thank you note
- Phone call
- Cards- Birthday, Holiday
- Anniversary of legacy commitment
- Personalized letter
- Gifts
- Impact report

**SHARE**
- Donor Listings and Testimonials
- Newsletter
- Website
- Poster, digital display
- Annual report or event program

**HONOR**
- Recognition at gatherings
- Legacy Shabbat
- Gala or other special event
- Holiday programming

**INVITE**
- Special gathering
- Reception before “camp” gathering
- Invitation to event not open to general community

**Donor**
Will you...

- Send a personal note within two days of receiving commitment?
- Make a personal phone call a week after receiving commitment?
- Hold an event specifically for legacy donors?
- Create a Legacy society?
- List Legacy society members on website?
- Send cards created by campers?
Sample Stewardship Plan

Care (personal touch) –

• Thank you call and note upon receipt of commitment (within 48 hours)
• Send card created by campers
• Personal phone call to invite to visit camp

Share – (listings and testimonials)

• Create a Legacy Society and list in e-newsletter
• Personal stories and testimonials of members posted on website, social media and published in e-newsletter

Invite – (event specifically for legacy donors)

• To camp for shabbat or some other event

Honor – (among your camp family)

• At annual gala
• On visiting day
Legacy Plan Components

- Case Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing
- Stewardship
- **Goals**
- Implementation Checklist
Set Goals

SET GOAL
MAKE PLAN
GET TO WORK
STICK TO IT
REACH GOAL

[Image of colorful post-it notes with motivational phrases]
Set Goals

- Make goals ambitious yet achievable
- Commit to each team member having one conversation per month
- Commit to obtaining signed Letters of Intent
  Year 1: Minimum of 18 – strive for 25
  Year 2: Minimum of 18 – strive for 25
## Sample Goals

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Goal</th>
<th>Stretch Goal</th>
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</thead>
<tbody>
<tr>
<td>Legacy team members</td>
<td>4</td>
<td>4</td>
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<tr>
<td>Board members</td>
<td>8</td>
<td>9</td>
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<tr>
<td>Multi-gen families</td>
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<td>3</td>
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<td>Long-time camp families</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Alumni (40 yrs+)</td>
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<td>3</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>18</strong></td>
<td><strong>25</strong></td>
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</tbody>
</table>

### Year 2

| Long-time camp families | 6 | 11 |
| Alumni (40+) | 9 | 9 |
| Current camp families | 3 | 5 |
| **TOTAL** | **18** | **25** |

*Minimum total of 36 Legacy gifts in 2-year period*
Rewards for Reaching Goals

For Year 1
- Minimum goal = 18 Commitments = $5,000
- Stretch goal = 25 Commitments = +$2,500
- TOTAL INCENTIVE = $7,500

For Year 2
- Minimum goal = 18 Commitments = $5,000
- Stretch goal = 25 Commitments = +$2,500
- TOTAL INCENTIVE = $7,500
Legacy Plan Components

- Case Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing
- Stewardship
- Goals

• Implementation Checklist
Implementation Checklist
• What **steps** will you take to implement your Legacy Plan?

• Be specific – your Implementation Plan should serve as a **checklist of tasks** to be accomplished in Year 1.

• **Calendar** out all your marketing, stewardship and conversation activities

• When you assign the tasks to a **person**, you have greater accountability, and you are more likely to stay on track
<table>
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<tr>
<th>Implementation</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
<th>July</th>
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<tbody>
<tr>
<td>Marketing - Tagline</td>
<td>staff signatures</td>
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<td>statements</td>
<td>membership renewal materials</td>
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<td>Brochure Annual Meeting</td>
<td>stuffer in mailing of HHD ticket requests</td>
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<td>Marketing - Display</td>
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<td>Listing</td>
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<td>Marketing - Announcements</td>
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<td>Annual meeting</td>
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<td>Marketing - Newsletter</td>
<td>article of acceptance and explanation</td>
<td>testimonial - Kaufman</td>
<td>ad</td>
<td>testimonial - Schiff</td>
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<tr>
<td>Stewardship (personal notes, calls, cards)</td>
<td>thank you notes and calls ongoing</td>
<td>Passover card</td>
<td>call to invite to annual meeting</td>
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<tr>
<td>Stewardship (listings, testimonials)</td>
<td>Kaufman in Newsletter</td>
<td>List for Annual Meeting</td>
<td>Schiff in Newsletter</td>
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<td>Trainings</td>
<td>Conversation training</td>
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<td>Meeting of Team Leaders</td>
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<td>Team meetings</td>
<td>assign prospects</td>
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<td>check in calls (new team members?)</td>
<td>team meeting</td>
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<td>Group Presentations</td>
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<td>Board Meetings</td>
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<td>listing in board packet</td>
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<td>report on progress</td>
<td>listing in board packet</td>
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<td>Reporting deadlines</td>
<td>Q1 ends 6/30</td>
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<td>report due 7/10</td>
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</table>
Your “Homework”

- **Write Legacy Case Statement**
  - Make sure it communicates clearly and succinctly the emotional aspect of why donors should make a legacy commitment to your camp

- **Develop Management Strategy**
  - Decide who on your legacy team is going to be responsible for which aspects of the plan

- **Identify Target Audiences & Prospects**
  - Don’t overlook your long-time donors/camp families at any giving level

- **Develop Marketing Plan**
  - Have a strategy for reaching people in a variety of ways

- **Develop Effective Stewardship Plan**
  - This is a critical component of a successful initiative

- **Set Goals**
  - Commit to achieving goals

- **Develop an Implementation Checklist**
  - Establish a time frame for accomplishing specific tasks

---

Due to your camp **LIFE & LEGACY Consultant** as a Word document (not pdf) by **November 25, 2020**
Resources

www.JewishLifeLegacy.org

Resources Tab
Username: Resources
Password: hgfllegacy
Resources

- LIFE & LEGACY TEMPLATES
- COMMUNITY & ORGANIZATION EXAMPLES
- HIGH HOLIDAYS
- ARTICLES & REPORTS
Resources

Getting to the search engine

Life & Legacy Templates

- Marketing:
  - Bill Stoffer - Jewish Federation of Charlotte
  - Bookmark - Temple Dor Dorim - Broward County
  - Brochure - Temple Dor Dorim - Broward County

- LIFE & LEGACY - Legacy Marketing Checklist
- LIFE & LEGACY Ad Template - Aspects of Jewish Life
- LIFE & LEGACY Ad Template - Commit

- Marketing:
  - Postcard - Dayton
  - Table Tent - JFS Louisville
  - Using Video to Drip
  - Market Legacy
  - Giving - Jewish Federation of Greater Seattle

Life & Legacy Resources

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<th>SEARCH</th>
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<tbody>
<tr>
<td>Enter Name or Keyword</td>
<td>Marketing</td>
<td>-All Types-</td>
</tr>
</tbody>
</table>

[Clear filters]
What’s Next?

✓ Set team meeting to work on Legacy Plan

✓ Legacy Plan due to Legacy Consultant by November 25

✓ Schedule monthly conference calls with your Legacy Consultant/JCamp Mentor

✓ Schedule time to review your legacy plan (between December 14 and January 13)
What’s Next?

✓ Attend Legacy Conversation training in January

Poll: Which day/time do you prefer?

✓ Submit final legacy plan to Legacy Consultant by Jan. 30

✓ Secure Year 1 Legacy commitments

✓ Attend Marketing and Stewardship training in May
Please join us for the following workshops

- **Nov 12, 7:30 pm EST** – *How to Incorporate the Legacy Conversation into Other Fundraising Conversations and Appeals* with Nanette Fridman

- **Dec 2, 7:30 pm EST** – *Asking Styles: Revolutionize Your Fundraising* with Brian Saber

- **January 14, 7:30 pm EST** – *Top 10 Legacy Fundraising Strategies from Science Research* with Russell James
S/he who persuades and compels others to give shall have a reward greater than that of the giver her/himself as it is said, “And the work of tzedakah shall be shalom.”  Isaiah 32:17
What questions do you have for us?
As my ancestors planted for me, so do I plant for my children

- Taanit 23a

Writing Your Legacy Plan

Harold Grinspoon Foundation – October 2020