



LIVE ON

BUILD YOUR JEWISH LEGACY

Live On Sustaining Legacy Plan Live On III

Sustaining plans must include the following sections:

I. The Case Statement

- A. Internal case statement (for your organization): why endowment building and legacy giving is important to your organization.
- B. External case statement(s) for your donors: why your donor may wish to leave a legacy. Case statements may be tailored to the specific passions of donors.

II. Plan for Existing Legacy Society Donors

If you do not yet have a legacy society, your plan must include starting one to recognize and steward current bequest and planned giving donors.

- A. Name of society
- B. Designated leadership for society.
- C. Current number of donors in society.
- D. Gift Type and Confirmation: Keep a list on the Stewardship Chart of the following
 - each donor's name
 - a description of the type of gift they gave
 - whether or not there is a signed Donor Record Form
 - and/or another type of confirmation of their planned gift like a copy of the relevant provision or letter from his/her attorney.
- E. Relationship Managers: Assign a board member, staff member, or volunteer to act as the relationship manager for each donor.
 - The relationship manager will conduct a one-on-one, face-to-face meeting with each of his/her assigned legacy donors to thank the donor and see if the donor has followed through with his/her promise.
 - Assign a date by which the face-to-face conversation will take place.
 - Create an easy process for the relationship managers to inform the managing staff about his/her progress with donor stewardship and documented proof of the gift.

F. Stewardship and Cultivation Plan:

- Describe plan for Legacy Society activities. (Plan must include ongoing appreciation using fundraising events and other special purpose meetings or educational opportunities, personal visits, calls, letters, listing of donors, invitations, etc.)
- Describe the new annual tradition for recognition and stewardship.

G. Help needed: Describe where you need help to implement the above.

III. Plan for Pending Gifts: Donors Already Solicited Without Commitments

A. Plan: Describe plan for further conversations and solicitation for donors who have been solicited (by *Live On* team in 2008 to 2010) but have not yet made a commitment.

B. Solicitation Strategy: List each donor and describe your solicitation strategy for each donor.

C. Solicitor Assigned: Assign a solicitor for each donor and a date by which they should be contacted by their relationship manager using the pending donor solicitation charts attached hereto.

D. Help Needed: Describe where you need help to implement the above.

IV. Plan to Solicit New Legacy Donors

A. Target Groups: Describe your target groups of prospects. Be specific and list names.

B. Individualized solicitation strategies: Describe your solicitation strategy for each donor.

C. Solicitor Assigned: Assign solicitors to each prospect.

D. Live On donor Solicitation Chart: Complete the Donor Solicitation Chart below.

E. Thanking and Closing: Describe thanking procedures and legacy society hand off for closed gifts.

F. Recording Policies: Describe Donor Record Form policies and procedures.

- Make sure that every donor's intent is followed. If donor wants to be anonymous, honor his/her request and implement policies and procedures that maintain donor anonymity.
- Make sure the Donor record form is in the best format to obtain all of the information you will need. See a sample attached hereto.

G. Describe a way to try to also obtain a copy of the relevant provision of the estate gift

H. Help needed: Describe where you need help to implement the above.

V. Plan for Honoring Donors after Their Lifetime

A. Estate Contact: Assign a member of your organization to serve as a contact for the estate.

B. Honoring Policy: Describe your policies and procedures.

C. Maintenance of Donor Records and Legacy Society/Appreciation: Describe where the records are kept and who is responsible for their upkeep.

D. Maintaining Contact: Describe how you plan to keep in contact with the late donor's family and continue to build relationships, if appropriate.

E. Help needed: Describe where you need help to implement the above.

VI. Leadership and Management necessary to Implement the Sustaining Legacy Plan

A. Responsible leadership: Assign responsibility for overseeing the implementation of the plan. Describe their role(s) within the organization.

B. Staff Management and implementation: Assign staff member to manage the plan.

C. Participants: assign responsibility for implementing the plan.

- Describe their role(s) or position(s) within the organization.
- Assign responsibility for tracking gifts.
- Designate an individual who will communicate with Rose Community Foundation to report closed gifts and send Donor Record Forms, Etc.

- D. Training Session Attendees: List those who will attend Live On training sessions.
- E. Board Updates: Create a calendar for the quarterly board reports about Live On progress
 - Use the pie chart or bar chart to show the percentage of board participation in Live On
 - Assign a Live On leadership team member to report to the board about Live On progress for each quarterly report.
- F. Future Leadership and participants: Explain your process for recruitment and training of volunteer and staff leadership to continue legacy programs into the future.
- G. Big picture fundraising: Describe how planned giving will be connected to other fundraising efforts.
- H. Help Needed: Describe where you need help to implement the above.

VII. Marketing Plan

- A. Strategies and Specific Tactics: Describe marketing strategies you will use to promote legacy giving for endowments and your legacy society. List specific tactics like events, direct mail, newsletters, website posting, etc. Include information about frequency of use.
- B. Education and Publicity: List all the ways you will ensure your constituency knows about and understands legacy giving.
- C. Donor Testimonial: Find a donor or donors who would be willing to give a testimonial about their inclusion of your organization in their estate plans.
- D. Create a plan of how the organization will market the testimonial.
- E. Help Needed: Describe where you need help to implement the above.

VIII. Does your organization have Endowment Policies and Gift Acceptance Policies?

- A. Do they need to be updated?
- B. Has the board approved of them?
- C. Attach copies of the policies if available.

D. If no policies exist, set a date by the end of the calendar year 2011 to draft, approve and ratify policies.

See Stewardship Chart attached hereto and track stewardship of current legacy donors in accordance with section II above.

Live On III Donor Solicitation Chart: Identify and Describe Legacy Donor Prospects
Make goals realistic – and achievable. For each target group (pending donors, board members, new prospects) and category (family contacts, one-on-one solicitations, group presentations)

Goals			
Quarter 1: Aug- Dec. 2011			
Target Group and Names	Type of Solicitation	Date	Name of Solicitor
<i>Pending Donors: please list</i>			
<i>Board Members: please list</i>			
<i>New Prospects: please list</i>			

Goals			
Quarter 2: Jan.- Mar. 2012			
Target Group and Names	Type of Solicitation	Date	Name of Solicitor
<i>New Prospects: please list</i>			
<i>Board Members: please list</i>			
<i>Pending Donors: please list</i>			
<i>Set Goal for # of closed gifts in this quarter</i>			

Goals			
Quarter 3: April-June 2012			
Target Group and Names	Type of Solicitation	Date	Name of Solicitor
<i>Pending Donors: please list</i>			
<i>Board Members: please list</i>			

<i>New prospects: please list</i>			
<i>Set goal for number of closed gifts in this quarter</i>			

Goals			
Quarter 4: July- Sept. 2012			
Target Group and Names	Type of Solicitation	Date	Name of Solicitor
<i>Pending Donors: please list</i>			
<i>Board Members: please list</i>			
<i>New Prospects: please list</i>			
<i>Set goal for # of closed gifts in this quarter</i>			

Goals			
Quarter 5: Oct- Dec 14, 2012			
Target Group and Names	Type of Solicitation	Date	Name of Solicitor
<i>New Prospects: please list</i>			
<i>Board Members: please list</i>			
<i>Pending Donors: please list</i>			
<i>Set goal for number of closed gifts in this quarter</i>			