

Big Shop or Small,
Don't Take Your Eye Off
the Legacy Ball.

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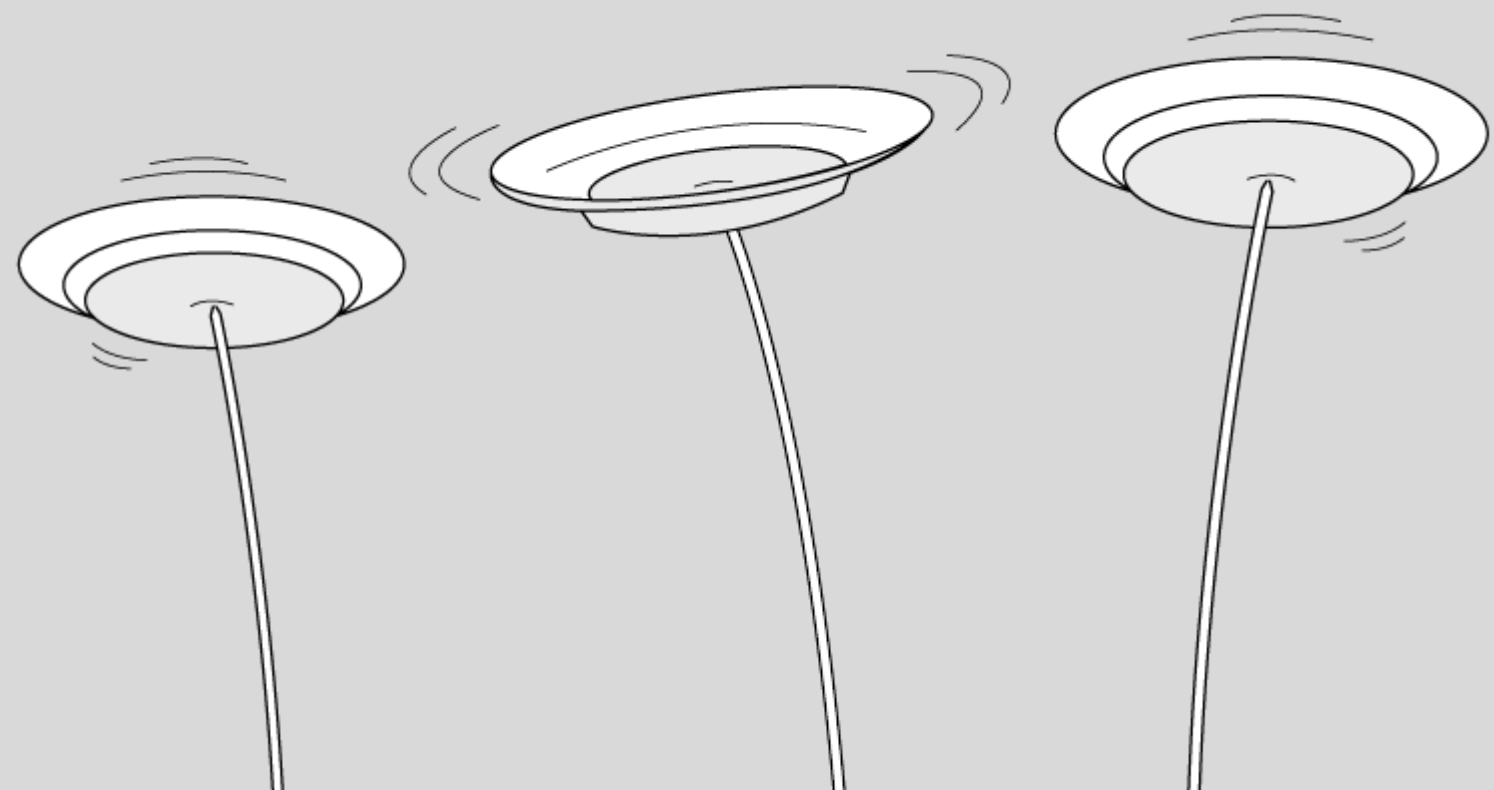
Alexis Gaipman, CFRE

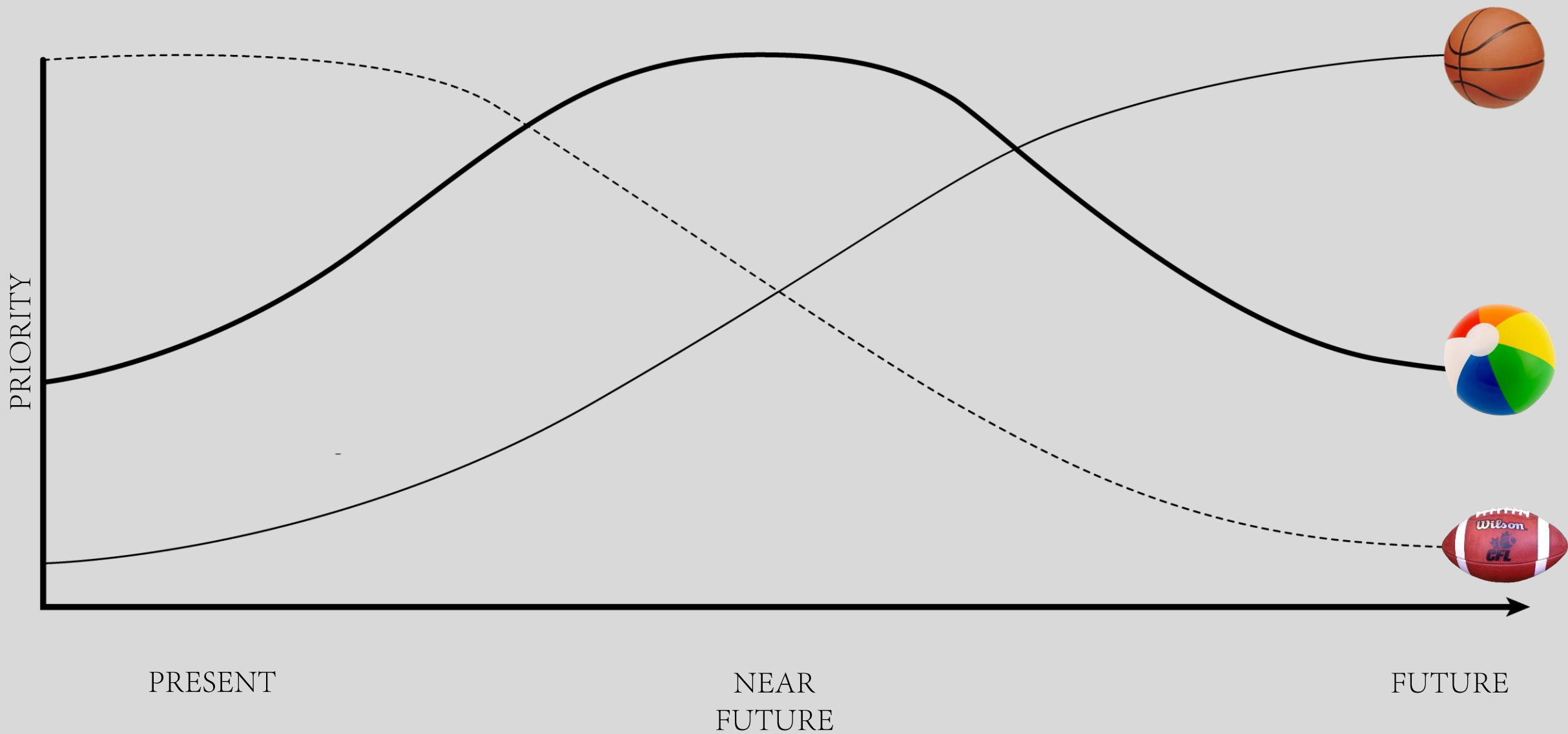
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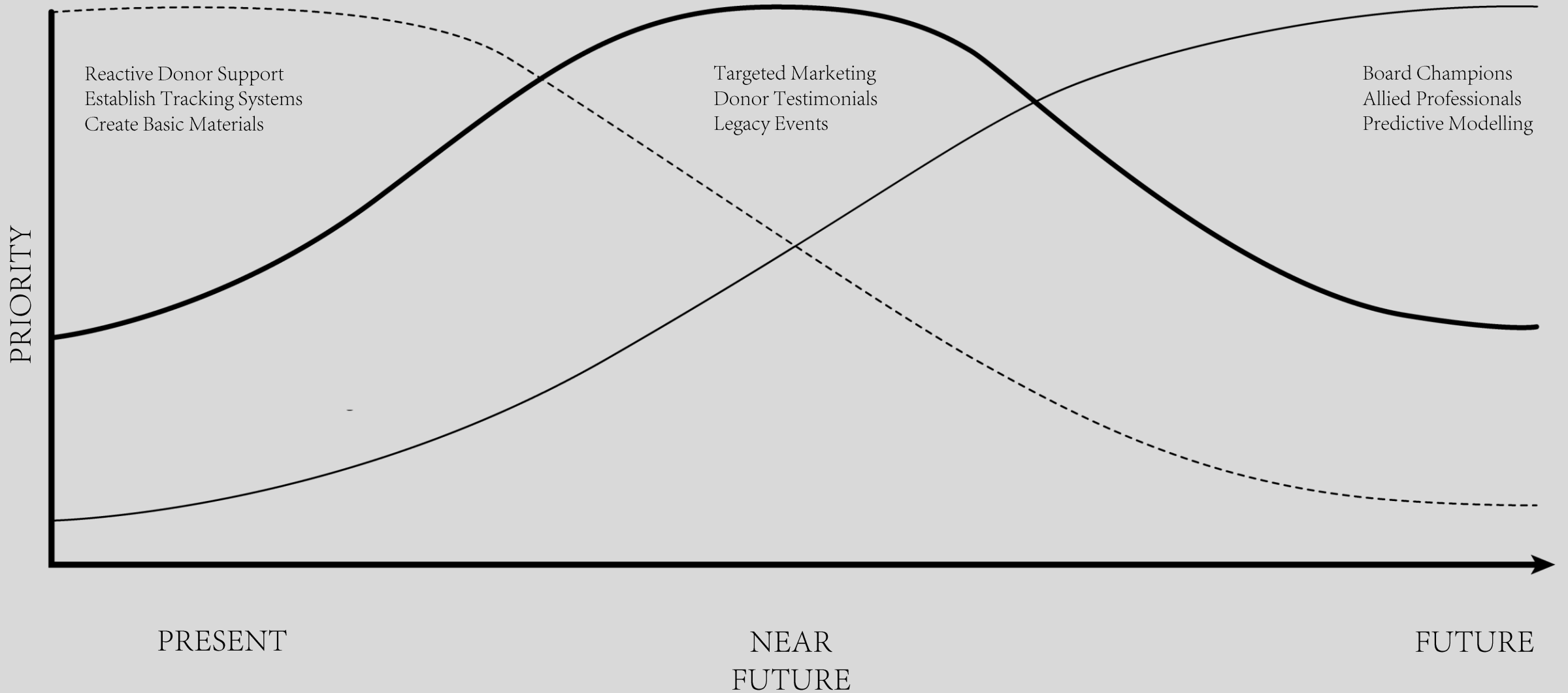


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Director, Community Giving
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FOUR CHALLENGES,
FOUR OPPORTUNITIES.

1 2 3 4

1. Align on what a Legacy Gift is.
2. Build a network of allies, advisors and champions.
3. Know which fundamentals to do well, consistently.
4. Create a sense of belonging to your cause.

ALIGN ON WHAT
A LEGACY GIFT IS



ALIGN

Challenge:

A Legacy Gift is many things to many people.

Internally: How does your _____ define Legacy?

Externally: How does a donor define Legacy?

– Do these align?

ALIGN

Aligning inside and out on Legacy Giving will set up your program to thrive or grow.
Legacy Giving is not an or, it is an and.

Opportunity:

- Celebrate donors, not money.
- Use consistency of message (internally and externally)
- Be a champion
- Build on wins
- Be ready.

Homework:

- Start, Review or Update Policies
- Plan a Lunch and learn
- Find Basic Will wording, templates for documents

BUILD A NETWORK OF ALLIES,
ADVISORS AND CHAMPIONS.



BUILD

Challenge (s):

I am not a lawyer. Are you?

Where to find these allies, and how to work with them

Where to start?

Where are lines drawn between the charity and allies?

BUILD

Building these relationships can be a referral source, provide new perspective, and the collaboration demonstrates accountability to a donor.

Opportunities:

- Find one champion, build and diversify from there.
- Keep the network in the loop (big wins, publications, events, etc.).
- Engage them in the strategy, storytelling, stewardship.

Homework:

- Talk to your teammates. What are they doing, the audiences, etc.
- Start searching for that one champion, ideally a lawyer.

KNOW WHICH FUNDAMENTALS
TO DO WELL, CONSISTENTLY.

3

KNOW

Challenge:

Not knowing where to start or where to focus your energy.

Not knowing what to measure.

KNOW

If you can't do the basics, do you deserve the gift?
Get started. Start small. Plan, and pace yourself.

Opportunities:

- It is not about the Will, it is about the conversation.
- Learn from the past to plan for the future. (great volunteer project!)
- Extend culture of philanthropy beyond the fundraising team.
- Be an active listener.
- Get (and keep) the family involved

Homework:

- Learn from and connect with your Legacy Giving peers
- Small in house mailing, tours, focus groups, roundtables, etc.
- *Ask for money, get advice. Ask for advice, get money.*

CREATE A SENSE OF
BELONGING TO YOUR
CAUSE.

4

CREATE

Challenge:

Creating a sense of belonging with your donors has to start with an understanding of their values, motivations and loyalty for your cause.

Easier said than done.

CREATE

Opportunities:

- Update or create a stewardship matrix for legacy donors.
 - *What is meaningful recognition to these donors?*
 - *Where does your charity's values align with the donor's values?*
- Investigate what language resonates with these donors and prospects.
- Consistently revisit strategy and messaging to keep your program growing.
- Remember that it is the biggest or most meaningful gift a donor will ever make.
- Develop a meaningful reminder of your gratitude.

Homework:

- Update An annual touchpoint with donors. Consistency is key.
- Ensure that Legacy Gifts are included in your gift recognition policies (or, make one)
- Regular surveying to explore and understand values.
- Pick up the phone!
- Actively engage donors pre and post gift.

Free/cheap stuff

- [Association of Fundraising Professionals](#) (AFP)
- [Canadian Association of Gift Planners](#) (CAGP)
- Leave a Legacy
- Sample will wording/templates/policy samples?
- SOFII - [Legacy section](#)
- Bobby Kleinman [Gift Planning Handbook](#) (free, full)
- Get a mentor
- Authors: Dr. Russell James, [Richard Radcliffe](#),

Thank you!

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