



Elements of a Legacy Initiative

There are several components to developing successful legacy programs, but most compliment and, in some cases, mirror other fundraising efforts. Remember: for long-term sustainability, legacy giving should be integrated into all of your fundraising plans.

Before You Begin:

- **Get buy in from key stakeholders including board, staff and other leadership and volunteers** – as with all fundraising, this is a team effort and requires the collaboration of both staff and volunteer leadership. Your team must be committed to this program.
- **Create a legacy giving case statement** – you need to tell your supporters WHY they should consider making a future commitment to you. Focus on the impact your organization is currently having on your constituents and why it is important they continue to do so in the future. Developing a one-page legacy giving case statement is the best way to educate your donor base.

Organize Your Program:

- **Create a marketing plan** – think of when and where you can promote this opportunity. Integrate information about your legacy program in newsletters, direct mail, social media, at events, and on your website. Promote your program consistently and throughout the year to your supporters.
- **Develop a list of legacy prospects** – remember, your prospects do not need to be your wealthiest donors. Think of who has been committed to your organization consistently and for a long time, such as people who make at least one gift annually, current and former board members, regular volunteers, and long-standing members and participants.



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Create a Stewardship Strategy:

- **Develop a stewardship plan** – showing your appreciation and gratitude to donors who have made a legacy commitment is key to ensuring their gifts come to fruition. Develop a stewardship plan that connects with donors in multiple ways during the year and is integrated into your annual work so that you are in touch with donors throughout their lifetime.
- **Set up a legacy society** – one way to acknowledge your legacy donors is creating a legacy society, where they have the option to be acknowledged for their commitment during their lifetimes and often can inspire others to make a legacy gift. You can honor these donors by listing legacy society members in annual reports, at events, or on your website.

Document Operational Elements

- **Create forms and policies** – work with your team to develop forms which can be utilized for formalizing legacy gifts and ensure that you have policies in place about accepting contributions. Some organizations may not be comfortable accepting physical donations or real estate or may need to set up an account to accept gifts of stock, so be sure to work with your finance team and / or treasurer to implement policies which work best for your group. Ensure that your materials are clear on what you can accept.
- **Put systems in place to record legacy commitments** – be sure to retain information on who you are asking, communications about their intention, and when possible, information about who will be managing their assets upon their passing. As with other fundraising, document the journey as your prospects become legacy donors.



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Secure Legacy Commitments

- **Prepare for the conversation** – workshop your pitch and help your team feel comfortable talking about legacy giving. Practice with one another and consider making your first ask to people that you know well, such as board members.
- **Have the legacy conversation** – set up one on one time with your prospects. Ask your donors a number of questions to remind them of the organization's impact on their lives and why they value your organization. Share with them that you, too, feel the same way and that is why you have chosen to make a legacy commitment. Ask them to join you in doing so. Be sure to record your notes and share their feedback with your team. And of course, thank them for their continued commitment!

**Visit our resource center for templates
and how-to guides on the steps above!**