



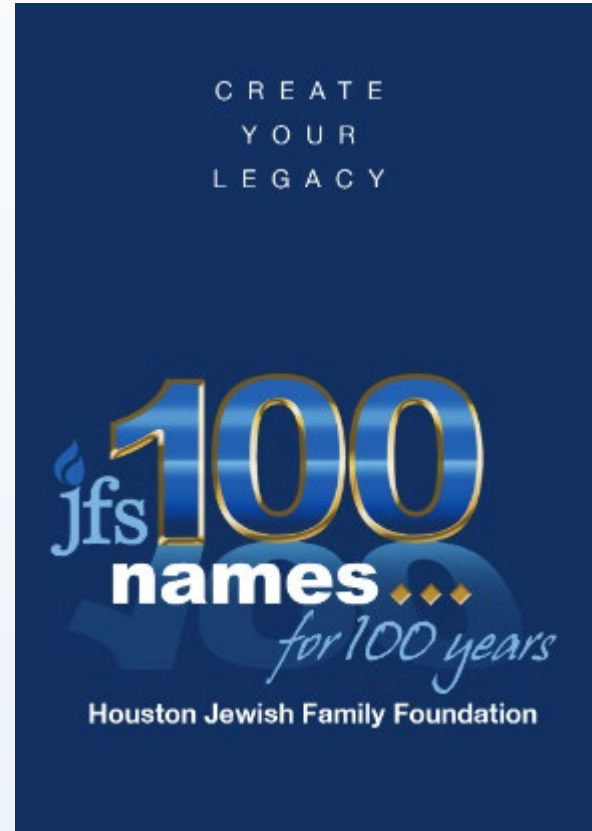
Beyond Best Practices
*Creating a Legacy Culture
Across Your Agency*

Cindy Anapolsky *Presenters* Rachel W. Davis

This is a marathon, not a sprint.

Best Practices:

- Annual Calendar
- Stewardship Plan
- Weekly actions
 - Dedicated Calls
 - General Conversations
 - Setting Up Appts
- Leadership Check-In



Gifts

Family to Family

This is a marathon, not a sprint.

Beyond Best Practice:

Family to Family Program
Illustration
Results

Prospects:

- Declared Legacy donors
- Top donors
- Continual gifts
- Ages 55 - 70



This is one AWESOME Family! • The Kaplan and Mintz Family
June 21, 2020

Leadership is Essential for Legacy Success

Best Practice:

CEO

Board members

Lead Staff Member

Lay Team Members



Leadership is Essential for Legacy Success



Beyond Best Practice:

Leadership Teams That Excel

- Dedicated lay leaders that have already made a Legacy Gift
 - Former Presidents
 - Longtime Donors
 - Frequent Volunteers
- Monthly meetings with team members and professional staff
 - Gives deadlines on meetings with prospects
 - Everyone is working together and can celebrate successes
 - Team members approach people that they know
- Hand off prospects to professional staff once initial commitment is made
 - Not the role of the team members to do the paperwork or finalize the gift

LEADERSHIP

Stewardship: All the time... for a long, long time

Best practice:

- Birthdays, Milestone Mazel Tov
- Special updates
- At agency meetings and events
- Special Legacy events
- Recognition systems
- For bequests, update family members
- Photos/data from specific program
- For pre-funded funds, annual custom report



Artwork created by a Celebration Company Participant

On your birthday, we wish you joy
and the personal satisfaction that
your generosity and vision will
help us to spread light, hope, and help
throughout the community.

Happy Birthday from
Houston Jewish
Family Foundation

in support of JFS Houston

[The Weiner Fellowship Program]

- THIS ENDOWMENT FUND WAS ESTABLISHED IN **1985**
- AS OF JULY 31, 2017, THE CORPUS OF THE ENDOWMENT FUND WAS **\$25,000.00**
AND THE MARKET VALUE WAS **\$135,131.04**
- DURING THE 2017 FISCAL YEAR, THE FUND MADE A DISTRIBUTION OF **\$2,523.40**



Stewardship: All
the time...
for a long, long
time

Beyond Best Practices:

Reaching out to the
children

For Prefunded Gifts:

Casual Contact/Engagement

For Estate Gifts:

Encourage Donors to Share
Information

**For No Legacy Gift but other
connections:**

Condolences/ Share Stories
Remember Yartzheit
Occasional Touches
Specific Ask

Community Legacy Culture Lifts Us All

When we encourage legacy giving as a community, we all benefit.

- *Donors only make legacy gifts to organization that they love. In most cases, there are 2 or more organizations.*
- *When community organizations work together*
 - *No duplication of efforts from each organization*
 - *Seamless for the donor for paperwork*
 - *Donors are a part of the entire community effort with other people like them*





Community Legacy Culture Lifts Us All

Beyond Best Practices:

Celebrate other Legacy Announcements

Encourage Legacy Gifts for Other Causes

*Community Legacy culture paves the way
for pre-funded Legacy gifts*



And now, to leave you with something sweet.....

- 1) Do something every week.
- 2) Think Legacy all the time and layer it into every aspect of your agency culture.
- 3) Keep your eyes open for individuals who may be naturally inclined to think Legacy and act on it.

-Cindy Anapolsky

-Rachel W Davis

