



# Legacy Giving

## Building Blocks

### Legacy Online Long-term Support Made Simple

Many organizations wrestle with how to build a legacy giving program. Competing demands for time, limited resources, and apprehension about the subject matter are common stumbling blocks. Traditional planned giving seminars overwhelm participants with descriptions of planned giving tools and techniques, but rarely focus on donor goals and objectives or the program infrastructure required for success. They are too short, too technical, and do not emphasize outcomes.

#### A New Model for Success

The Legacy Giving Building Blocks™ approach offers an effective alternative. Instead of emphasizing gift vehicles and terminology, we focus on a donor-centered methodology to solicit and close legacy gifts through the development of seven essential building blocks for your organization:

**Mission, Endowment & Legacy Giving** – Understanding why legacy gifts are important

**Case** - Articulating their meaning to your organization

**Leadership** – Effectively involving your board and staff

**Prospects** - Identifying and approaching the best supporters

**Stewardship** - Fostering and supporting relationships with those who commit

**Communications and Marketing** - Sharing your story about giving opportunities

**Program Plan** - Defining and building outcomes for sustainable revenue

#### Outcomes and Benefits

Our results-oriented, step-by-step philosophy provides you with a simple system to implement a successful legacy giving program, including:

- Strategic plan and next steps to grow your program
- Goals and objectives statement
- Case statement
- Plan and methodology for engaging your board, staff and supporters
- Criteria and a methodology for identifying prospects
- Materials to engage and talk with prospects
- Stewardship and donor relations criteria and materials
- Template for communications and marketing
- Policies and procedures
- Standards for assessing, quantifying, and measuring progress

By the end of the program you will have the necessary tools, skills and materials to be successful in identifying, cultivating, closing and stewarding legacy gifts.

## Legacy Online

The online program offers organizations a time and resource friendly way to build a successful legacy giving program. With an investment of as little as seven days of time, you can develop the competence and confidence to attract legacy gifts.

Unlike other educational programs, the \$997 tuition covers all staff and volunteers from a participating organization for a 12-month period and includes:

- **Seven dynamic webinars** that walk you step-by-step through the building blocks program
- **Seven additional interactive question and answer calls** for program and action steps review
- **24/7 access** to all program and supplemental materials in the online resource library
- **Audio recordings** of seminars and question and answer calls to review when your schedule allows
- **Sample materials and templates** you can edit and use for your individual charity
- **An on-line community** for sharing stories, exchanging ideas, discussing strategies and successes

## Testimonials

"Legacy Giving Building Blocks™ focuses on the essence of building and managing a legacy gifts program. The universe of planned giving is so enormous. The Building Blocks program gave me the tools, template, operational boundaries and a time management plan."

Jan Thibodeau, Senior Foundation Officer, New Hampshire Community Foundation

"Legacy Giving Building Blocks™ came highly recommended based on their extensive experience and exceptional teaching skills. It was an ideal way for development staff, executive staff and board members to learn about how to implement a legacy/planned giving program."

John D. Baker, MPA, CFRE, Managing Director, Delaware Association of Nonprofit Agencies

"Although knowledgeable about gift planning, I was looking for tips and ideas to incorporate in my approach to gift planning. The program covered everything one should consider when creating a gift planning program."

Debbie Layton, JD, Associate Director of Gift Planning (retired) - University of Pennsylvania

## **For More Information:**

To learn more about how we can help your organization build a successful legacy giving program, please email us at [info@legacygiving.com](mailto:info@legacygiving.com), call (802) 685-3477, or visit our website.