



Legacy Giving

Building Blocks

Legacy Plus

Educating Your Board and Staff Leadership

Your board's most important role is to provide stewardship of your mission. Board members give voice to long term aspirations, and have responsibility for characterizing, deciding and providing oversight to program goals, objectives, policies and values.

To realize these objectives, your board has ultimate responsibility for the long-term financial well-being of the organization. It must maintain a healthy culture of financial oversight, plan and advocate an ongoing strategy of communication, and ensure that your supporters understand the central role philanthropy plays in the implementation of your mission. To achieve success, your board must adopt a philosophy that embraces a commitment to encouraging legacy giving.

We recognize that legacy giving is not well understood, and can be intimidating. To build and grow a successful program for attracting long-term support, it is essential that board members, staff and other volunteer leaders understand and support legacy giving. In order to better prepare your organization for launching a program that will see immediate results and become sustainable over time, you may find it helpful to engage them in a process that encourages their participation and best thinking.

Legacy Plus is designed to introduce your organization's leadership to the concept of legacy giving, and provide them with the rationale, next steps and decision points for attracting long term support. The program includes:

- conference call with CEO and board / development committee chair to review goals and objectives
- online questionnaire for board and staff leaders to complete in advance of onsite discussion
- onsite presentation and discussion about why legacy giving is important to your organization's future
- checklist to focus your leadership on next steps and decision points

The \$2,497 fee for Legacy Plus also includes a year-long registration for [Legacy Online](#), in which board members are also encouraged to participate.