

# **SONOMA VALLEY NONPROFIT LEGACY PROGRAM**

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September 28, 2015

# GOAL: to ensure long-term organizational sustainability through increased Legacy Giving

- Recognize long term value and growth opportunity provided by legacy gifts
- Ensure that our programs and services are viable and continue to grow well into the future
- Provide an opportunity for donors to reflect and express their values, and to strengthen causes in which they believe
- Emphasize that legacy giving is for everyone, not just the wealthy
- Acknowledge Legacy Circle\* members throughout their lifetime with special recognition
- Keep it simple!

\* *Note: Include correct legacy program name here.*

# BACKGROUND

*(example only; replace with appropriate background information.)*

- Since inception, our organization has received a few bequests, all unexpected.
- In 2008 we formed our Legacy Circle and invited members who had named our organization a beneficiary in their will or trust to join.
- For a few years we partnered with Sonoma Valley Fund in several recognition events for Legacy Donors (cave concerts, receptions at a private home.) Since then there has been little follow-up.
- The board has requested a renewed focus on revitalizing our Legacy program and has appointed \_\_\_\_\_, a Legacy Circle donor, to chair the effort.

## **BOARD RESOLUTION - *example***

We, the Board of Directors for the (nonprofit's name) do hereby agree that Planned Giving is an important part of our long-term sustainability and that every Board Member will be strongly encouraged to make such a commitment. The size or percentage of the individual's commitment will be up to the Board Member, and will be considered a part of the participation in the organization's leadership.

*Note: The emphasis here is the importance of having the board adopt a resolution regarding Legacy Giving. The language may be adjusted to meet the needs of the board.*

# MAJOR STRATEGIES

- Strengthen the organization's relationship with existing Legacy Circle members by recognizing and engaging them. Put mechanisms in place to maintain these relationships over the long-term.
- Significantly increase participation in our Legacy Circle (i.e. current and past board members, staff, members, and others who care about the future of our organization in our community.)
- Review/Update existing communications materials, procedures and systems for the Legacy Program (e.g. gift acceptance policy, data base and tracking, recognition program, publicity and marketing materials, etc.)

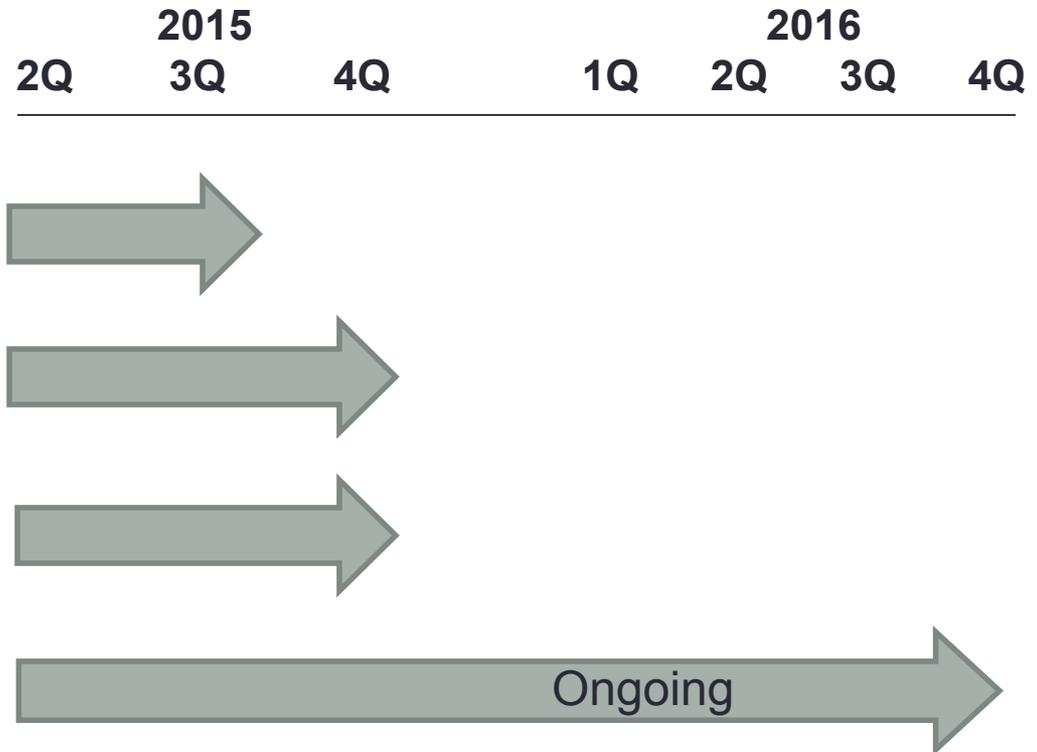
# MEASURES OF SUCCESS

- Challenging! The number of gifts, bequest dollars, and timing of gifts are never fully known in advance.
- Thus, our focus will be on activities that **can** be measured:
  - number of face-to-face visits/contacts with Legacy Circle members and prospects
  - marketing efforts
  - number of Legacy Giving workshops or informal gatherings; number of attendees
  - number of additional members of our Legacy Circle
  - other, as appropriate

# WORKPLAN/TIMELINE

## 1. Strengthen relationship with existing Legacy Circle members

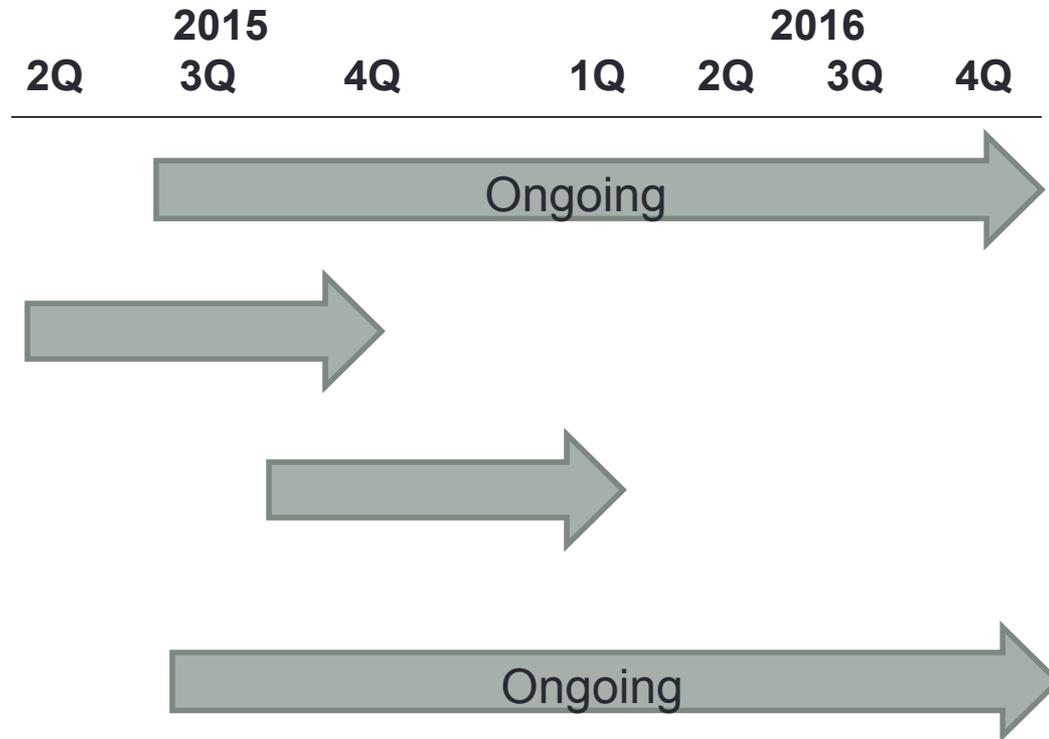
- ID current Legacy Donors
- Create and host first annual private reception or luncheon
- Collect Legacy Donor input to create additional recognition activities
- Maintain regular interactions, including annual one-on-one outreach



# WORKPLAN/TIMELINE

## 2. Increase membership of Legacy Circle

- Identify potential new Legacy donors
- Develop and implement first Legacy Giving Workshop
- Hold one or more informal Board member-hosted gatherings annually
- Follow-up with Legacy Circle prospects on a regular basis

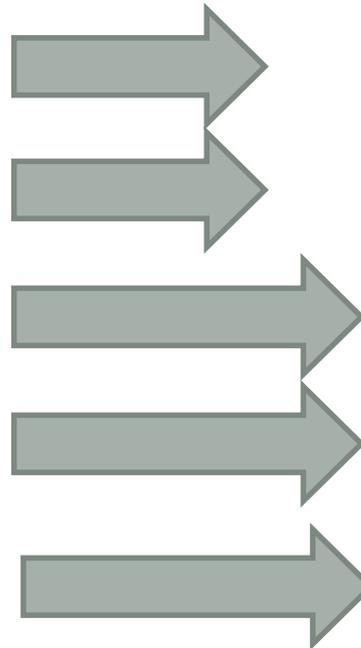


# WORKPLAN/TIMELINE

## 3. Review/update Legacy Program materials, procedures, systems

- Review and update messaging on all forms of communications
- Review and update (or create) the Gift Acceptance Policy
- Identify and train staff members
- Assess data collection procedures and modify as required
- Identify and update tracking systems as required

	2015			2016			
	2Q	3Q	4Q	1Q	2Q	3Q	4Q



# Implement

# What we need from the Board

- Your commitment to the Legacy Program
- Be advocates for the program with your friends and colleagues
- Participate personally in some way to support the program:
  - Consider hosting a small gathering for a legacy discussion
  - Tell your story at a Legacy Planning Workshop
  - Help plan the annual Legacy Circle luncheon/reception or a Legacy Planning Workshop
  - Let us know when you are ready to make your planned gift and to join the Legacy Circle

# NEXT STEPS

- **Convene the new Legacy Program committee**
- **Develop a more detailed timeline, including “who” and “when”**
- **Move forward with the plan, coordinating with appropriate existing committee work (e.g., development, marketing, data base review, etc.)**
- **Provide periodic reviews to Board**

# References

- *“Don’t Miss the Opportunity to Strengthen Your Organization through Legacy Giving”*, GuideStar, Feb. 2011,  
<http://www.guidestar.org/rxa/articles/2011/strengthen-through-legacy-giving.aspx>
- *”Start a Legacy Society,”* The Aspen Institute, Community Strategies Group, Sept. 2005,  
[http://www.aspenccsg.org/rdp/\\_documents/tactics/b\\_2.pdf](http://www.aspenccsg.org/rdp/_documents/tactics/b_2.pdf)
- *“Starting a Simple Legacy Program Toolkit”* Leave a Legacy Campaign, Western New York, June 7, 2012  
[http://leavealegacywny.org/downloads/wnypgc\\_lal\\_2012\\_starting\\_a\\_simple\\_legacy\\_program\\_toolkit\\_updated\\_6\\_12\\_12.pdf](http://leavealegacywny.org/downloads/wnypgc_lal_2012_starting_a_simple_legacy_program_toolkit_updated_6_12_12.pdf)