

Sample Legacy Stewardship Plan

PURPOSE of appreciation	Why? So that...	What? Examples:	How often? At least one of these tools...	PRE-Letter-of-Intent	POST-Letter-of-Intent	POST-Formalization
Personal Relationship	The donor feels personally known and appreciated	<ul style="list-style-type: none"> • Thank You note, preferably handwritten • Phone call • Holiday/birthday cards or emails • Gifts (ie mishloach manot) • Gifts in honor of milestones • Invitations to coffee 1x/year • Invitations to community events all year 	2x/quarter	✓ ✓ ✓	✓ ✓ ✓	✓ ✓ ✓ ✓ ✓ ✓
Affirmation	The donor continues to feel good about the commitment	<ul style="list-style-type: none"> • Impact Report • Impact stories from beneficiaries • Personal note from beneficiary 	1x/quarter	✓	✓ ✓	✓ ✓ ✓
Membership	ALL donors take pride in joining an effort bigger than themselves	<ul style="list-style-type: none"> • Annual Legacy Reception • Group shabbat dinner • Pre-party/VIP events before full-community gatherings • Special sticker/ribbon on event nametags 	1x/quarter	✓?	✓	✓ ✓ ✓ ✓
Community appreciation	ALL donors feel celebrated by the broader community	<ul style="list-style-type: none"> • Honors at community events, such as candle lighting • Website listing • Impact Report listing • Donor wall/display • Newsletter highlights • Newspaper items 	1x/quarter		✓	✓ ✓ ✓ ✓ ✓
Role modeling	Prospective donors feel inspired to consider joining, too	<ul style="list-style-type: none"> • Spotlights in newsletter or a website donor profile • Solicitation of testimonial for future Legacy materials 	1x/year			✓ ✓
Who can help?		Person who made the ask • Senior Leadership • Board members • Development Staff • Peer-to-Peer Legacy donors				

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