**Hawai‘i Community Foundation**

**Legacy Stewardship Workshop Notes**

9/20/17

Legacy Donors:  Prospects for Life

* They can always change their minds.
* Stewardship is key to keeping them engaged
* Treat them like major donors because they will be if you do.

How will you steward your Legacy Donors?

* External stewardship GOAL: Keep donors engaged and happy with your organization
  + Thank them personally, timely, and often
  + Recognize them
  + Engage them
  + Report to them
  + Create a Legacy Society to help accomplish these points
* Internal stewardship – are you able to meet their wishes? GOAL: The Donor is not forgotten and the gift is used well.
  + Confidentiality
  + Anonymity
  + Communication preferences
  + Record-keeping to ensure the gift is used as the donor wishes

Know your donors

* Who are your Legacy donors?
* What are their characteristics? i.e. gender, age, family dynamics, culture, generation, other?
* How do these characteristics influence your interaction?

Be creative

* Incorporate your organization’s work into your engagement plans
* Note ideas that are inexpensive and relatively easy to do

Other Resources:

* <https://www.hawaiicommunityfoundation.org/plannedgiving> (has templates for letters and the Planned Giving Toolkit
* Donor Bill of Rights (<http://www.afpnet.org/files/ContentDocuments/DonorBillofRights.pdf>)
* *Donor Centered Fundraising* by Penelope Burk
* *Effective Donor Relations* by Janet Hedrick
* *Donor Centered Planned Giving Marketing* by Michael J. Rosen
* *A Simple Act of Gratitude: How Learning to Say Thank You Changed My Life* by John Kralik