



HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

give
beyond your years

Hawai'i Legacy Giving Campaign

Legacy Stewardship Workshop
Wednesday, September 20, 2017
Hawai'i Community Foundation



Our Time Together

What

- Noon Stewardship Overview**
The Nuts and Bolts
- 12:20 Q & A**
- 12:25 Know your donors**
Different strokes for different folks
Be creative
- 12:40 Lay out your plan**
Collaborate with your table mates
- 1:10 Share and ask questions**
- 1:30 Workshop Ends**

Who

**Patti Look, Principal,
The FundDevelopment Group**

Hawai'i Community Foundation

- **Curtis Saiki, General Counsel & VP for Philanthropy**
- **Martha Hanson, Associate Director of Donor Relations**



Legacy Donors: Prospects for Life

- They can always change their minds
- Stewardship/engagement is key
- Treat them like major donors

2017 2018 2019 2020 2021 2022 2023 2024 2025



Legacy Stewardship in Tandem

Internal

now & beyond

Wishes are met

Donor is not forgotten

External

now

What the donor sees

Keeps the donor happy



Internal Stewardship

Record-keeping is critical

Immediate Needs

- *Capture gift intent and gift vehicle to meet donor expectations*
- *Insure confidentiality*
- *Means to fulfill donor preferences*
 - Anonymity
 - Communication Preferences
 - Interests

Future needs

- *Be sure this information is available to those who need it and they know about it and know how to access it.*
 - Smooth staff transitions
 - Records available when donor passes
 - Share donor's story with those who benefit

GOAL: The Donor is not forgotten and the gift is used well.



Review of what to do with a new legacy donor

Key information to capture:

- ❖ Name, address, contact information – phone, email
- ❖ Anonymity?
- ❖ Gift intent and vehicle
- ❖ Spirit of the gift and donor bio

System(s) to keep and access this information:

- ❖ Data base
- ❖ Paper File



External Stewardship

- *Thank donors personally, timely, and often*
- *Recognize them*
- *Engage them*
- *Report to them*
- *Create a Legacy Society to help do this*

Goal: Keep donors engaged and happy with your organization



How do you put this together?

		Acknowledgments					Personal communications and touches							Events			Public recognition		Communica-tions		
Donor Segment	Recognition Society	Receipt	CEO TY Ltr	BOG Chr thank you note	BOG acknowledgment	Staff	Assigned relationship manager	Welcome Packet	Welcome note	Life story and gift story	Thanks-for-Giving	Birthday card or call	Annual Visit	Annual Event	Scholarship Event (if approp.)	Legacy at least 1 of 2 or 3			Annual Report	Faces	E-UPDATE
Legacy	Legacy Society		X	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X	X

Make a list of what you want to do



Create a Legacy Stewardship Calendar

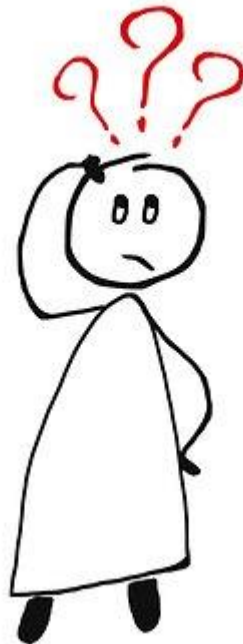
Stewardship Vehicle	JAN	FEB	MARCH	APRIL	MAY	JUNE
Events			Legacy Lunch			
E- Comm	e-update	e-update	e-update	e-update	e-update	e-update
Print Comm					Annual Report	
Personal Comm	New Year Greeting					

	JULY	AUG	SEPT	OCT	NOV	DEC
Events	Legacy Lunch	Scholarship Brunch		Annual Donor event	Legacy Lunch	
E Comm	e-update	e-update	e-update	e-update	e-update	e-update
Print Comm				Faces		
Personal Comm					Thanksgiving card	

When do you want to do it?



Questions?





Know your donors

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



Be creative

- How can you engage your donors?
- How can you incorporate your organization's work into these engagement plans?
- What can be an effective engagement vehicle that's inexpensive and relatively easy to do?



Talk and Share

With your table mates:

- Draft your legacy stewardship plan.
- Use the shared expertise at your table.
- Choose someone to report for your table

Report back to the group:

- “Ah ha” moments?
- Good ideas that came from the brainstorming?
- Anyone willing to share their draft stewardship plan?
- Gnarley issue/question in need of group feedback?



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



Additional Opportunities

October 27

CGA training for current partners

November 1

7:30 a.m. – 5 p.m.

Sheraton Waikīkī

National Philanthropy Conference

Will include session on “How to Connect with Wealth Managers & Professional Advisors”

<http://afpaloha.afpnet.org/>

1st Qtr 2018

Date to be determined

HCF Legacy Campaign Celebration



HAWAI'I COMMUNITY FOUNDATION
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MAHALO

LEAVE A LEGACY

Honor the history of aloha.

Look into your heart for the local cause most meaningful to you and leave a gift in your will or trust. You will be adding a stitch to Hawai'i's legacy of giving.

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HAWAI'I COMMUNITY FOUNDATION
Amplify the Power of Giving

A message from Hawai'i Community Foundation on behalf of nonprofit organizations serving the islands.

Learn more at HawaiiCommunityFoundation.org/Legacy or ask your professional advisor.