



Tips for Having a Conversation with Board Members Regarding a Legacy Commitment

1. Remind them your organization was **selected in a competitive process** to participate in the two year Create a Jewish Legacy program sponsored by the Jewish Community Foundation of Greater MetroWest and the Harold Grinspoon Foundation. (NOTE: Our community's **first year is July 1, 2014-June 30, 2015**. However, if you learn about a legacy that was formalized after January 6, 2014, it counts toward your first year goal. The same is true of legacies made any time in the past but just disclosed now.)
2. Explain that as part of your participation in this unique program, **you receive training, materials and support** to integrate legacy giving into your overall fundraising plans.
3. Share with them that you will obtain a **\$10,000 incentive grant** if you secure a specific number of legacy commitments each year for the next two years, so you are reaching out to board members to begin to gather momentum for this effort.
4. Explain that a legacy commitment can either be 1) a formalized commitment they have **already made** in their estate plan but have not yet notified your organization about, or 2) a commitment **they make and document** (possibly a bequest, life insurance or IRA designation) between now and June 30, 2015 to count toward your Year 1 goal.
5. Distribute a copy of the **Confirmation of Commitment form** for them to review and walk them through it so they see how straightforward it is. Help them understand they can leave legacy gifts to **any** of the listed, CJL partner organizations, or name another.
6. Remind them of what is **unique about your organization** and the value it provides to the Greater MetroWest Jewish community.
7. Remind them of **their current commitment** to the organization as represented by their **leadership** at the board level.
8. Describe how a legacy commitment will help **sustain your organization for future generations** and that it is **the role of current leadership to serve as role models** for the rest of your constituency.
9. Share with them how important it is for your organization to be represented at the **community-wide celebration** that will take place toward the end of each program year.
10. Offer to **meet with each of them individually** to discuss their specific legacy commitment at a time and place that is convenient for them, and tell them you **look forward to hearing from each of them**. Make sure to share your contact information.
11. **Thank them** for their time and commitment to the legacy program.
12. Tell them you look forward to **reporting your successes** at future meetings as you work toward securing the future of your organization and obtaining the incentive grant.
13. Following the meeting **set up appointments**. If you are present for the full meeting, try to do so before you leave. If not, make follow-up phone calls. **Coordinate this with your legacy team**. Hopefully some members of the board will sign the form and return it to you that evening because they've already left a legacy they never told you about!

GOOD LUCK! YOU'RE DOING A MITZVAH!