



## **Camp Legacy Program – 2010-2011**

The Grinspoon Institute for Jewish Philanthropy, in cooperation with the San Diego Jewish Community Foundation (JCF), launched a pilot legacy giving program in 2008 to train teams at selected camps to attract bequests gifts for endowment purposes. Six camps are near completion of their second year goals and thirteen camps are entering the 4<sup>th</sup> quarter of their first year.

The 2010-2011 two year program comprises the following activities:

- Coaching and training of lay and staff leadership teams on planned giving tools and solicitation approaches
- Helping camps create a legacy giving action plan and set goals
- Providing sources for educational information, assistance with marketing and outreach
- Providing two \$10,000 incentive grants upon completion of mutually agreed upon number of donor conversations and donor legacy pledges per year
- Providing travel stipends of \$1,000 per training per camp legacy team to attend trainings

### **What is a legacy gift?**

A legacy gift (aka planned gift, bequest, deferred or estate gift) is an after-life gift that has been left by the donor to the camp. Legacy gifts can be dollar amounts or percentages of a simple will; beneficiaries of life insurance or retirement benefits; or more complex estate planning and tax-saving vehicles. The national average value of a legacy gift is \$50-75,000, however, it is critical to know that anyone at any income level can give a legacy pledge of any amount to the camp.

### **Why should camps get involved in legacy giving?**

The largest transfer of wealth in history is occurring as we speak. Legacy giving is the largest source of individual and family charitable donations. Those non-profit charities that position themselves to receive planned gifts will be the most financially stable in the future.

### **What “counts” towards the camp’s measurable goals?**

In the camp legacy program, most camps have had as their goals 50 conversations with their most loyal donors with a goal of obtaining 25 legacy pledges. Conversations are one-one discussions as well as large group and small group presentations. Legacy pledges must be a signed letter of intent by donors.

## **Projected Timeline**

### **November - December 2009**

- Information session at Grinspoon Conference November 16th
- Program applications for 2010-2011 due December 11th, including proposed legacy teams (at least 1-2 staff and 2 lay leaders)
- GIJP selects up to 12 camps by December 31<sup>st</sup>.

### **January –April 2010**

- 1<sup>st</sup> in-person training sessions for all team members- Sunday January 31 10 am – 3 pm; location in Western MA
- Regular (bi-monthly) coaching of camp legacy teams by e-mail and telephone calls
- Camps complete their legacy action plans including timelines, measurable outcomes, marketing, and management

### **May – October 2010**

- Camp Legacy Teams implement action plans by meeting with donors

### **November – December 2010**

- Continued implementation of action plans
- 2nd training session for all team members (tentatively Sunday, Nov 14 or Nov 21 - 10 am – 1 pm in western Massachusetts)
- Participants and program directors outline 2010 program year schedule

### **2011**

- Continued implementation of Action Plans
- At least one in-person workshop

## **Job Description for Camp Legacy Team Members**

- Have passion for the camp and be comfortable sharing that passion with other donors
- Reflect a diversity of age groups, donor levels and experience
- Team members do not need to be knowledgeable about estate planning, but be willing to learn the basics
- Take time to read background information and go through trainings to prepare for your role and to understand the legacy fund-raising process
- Provide timely responses to communication and assignments
- Provide clear input to professional staff, other team members and the legacy coach
- Make your own legacy gift
- Identify prospective legacy donors from your community and respect confidentiality
- Be willing to approach others to talk about their potential legacy gift
- Assist in stewardship and communication efforts

### **Time commitment**

- 1-2 hours/month for meetings (in person or by teleconference) = 12-24/year
- 1-2 hours/month for email, occasional workshops, preparation = 12-24/year
- 6-8 hours/twice/year for trainings = 12-16/year
- 2-3 hours/month for personal meetings with prospective donors = 24-36/year

**Total = 60-100 hours/year** (averages 5-7 hours/month)

## **For More Information:**

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