



## Ten Steps to Success in Bequest Building

- 1. Obtain Board approval for your Leave a Jewish Legacy program.** In order for your bequest program to succeed, the commitment and involvement of your Chair, Trustees and Executive Director is critical. Commitment to the program means not only philosophical support for the concept of seeking bequests, but also a commitment of resources (staff, time and money) to make the program work. Board members should be expected to participate by making their own bequests and by identifying and cultivating bequest prospects.
- 2. Identify and enlist a champion for your Leave a Jewish Legacy program.** Find a specific individual with clout in your agency who has a special interest in the legacy program and who can act as your champion with Board and management. A committed champion can often open doors and keep you on track in marketing and administering your program.
- 3. Recruit a Legacy Committee.** You must establish a Legacy Committee with a special interest in the Leave a Jewish Legacy program. A group consisting of four or five people is ideal. The job of the Committee is to promote awareness and interest in the program, to help develop the case statement and marketing materials, to identify prospects and assist in personal solicitations, to help develop policies and procedures and, generally, to work to insure that the program moves forward on schedule.
- 4. Review and, if necessary, update your Case Statement.** Donors want to know why they should support your cause. They do not give just because you are a “good” agency doing “worthwhile things” in the community. You have to show that you are providing specific programs of benefit that people will care enough about to be willing to support. You have to show them how their support can make a real difference for the fulfillment of your mission, now and into the future. Your completed case statement can be posted on your website.
- 5. Establish goals and objectives for your program.** Using the bequest plan outline provided in your handbook, develop specific goals for how many bequest commitments you want to obtain per quarter. Also establish marketing goals, e.g. how many drop-in ads about legacies you will publish in your bulletins.
- 6. Identify your best prospects for bequests.** Review donor/prospect lists. A simple way to identify your best prospects is to **FLAG** your lists. Look for:
  - F**requency of giving. Donors who give regularly show their interest.
  - L**ongevity of giving. Donors who give consistently over time, even in small amounts, are the best prospects for bequests.
  - A**ge. People think about wills and estate planning starting in their fifties and beyond.
  - G**ender. Most bequests come from women—who outlive the men of their generation by an average of 7 to 9 years. Women who have been involved with your agency over the years are the most likely to include your agency in their wills.

- 7. Work with the Foundation to develop a bequest prospect plan.** Specify exactly what you will do, how you will do it, and what the timetable will be—and then take the steps necessary to accomplish your goals. Here are some examples of where to start:
  - A. Identify five (or six, or ten) individual prospects whom you will visit personally to discuss the Leave a Jewish Legacy program.
  - B. Make a list of all of the written materials that you now send to individuals (for example, annual appeal letters, special fundraising appeal letters, newsletters about what’s happening in your agency, annual reports, quarterly magazines, information on special events, etc.). Look for ways to include bequest information—personal stories of people who have included your agency in their bequest plans to motivate others to act.
  - C. Develop a website for your agency and link it to the Jewish Community Foundation’s website ([www.jcfhartford.org](http://www.jcfhartford.org)) so that your constituents can learn more about bequests.
  - D. Send a bequest mailing to targeted prospects. The Foundation will provide materials that you can send to targeted prospects with a cover letter and reply card.
  - E. Always include a reply card with your materials. Make it easy for a donor to respond—and to indicate interest. Once a person sends back a card, make sure to send the materials requested, and then follow up with a phone call within two weeks.
  - F. Make sure that your materials include the correct legal name of your agency and of the Jewish Community Foundation so that the donor’s attorney can draft the bequest language accurately.
- 8. Follow up personally on all responses.** Follow up on each response with a telephone call, and a personal visit when possible. Discuss your agency, your mission, and the prospect’s special interests in it. Find out as much as possible about the prospect so that you can continue to build the relationship.
- 9. Decide how you will recognize and continue to cultivate bequest donors.** Remember that continuing cultivation and recognition will be critical to the success of your program. You want to keep your current donors involved and happy and count on them to encourage others to join in the program.
- 10. Most important of all, KEEP AT IT!**