

**Legacy Giving Plan for Affiliates**

Plan for 2021 – 2031
(template)

| Phase | Options/Examples | Year | Activities | Notes |
| --- | --- | --- | --- | --- |
| Set Goals | Secure 3 legacy gift commitments in 2021 (3 completed Legacy Donor Intent forms)Meet match opportunities (available until 12/31/21) | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |
| Establish or Reinvigorate a Legacy Giving Committee | Establish committee of 5 members to spearhead the legacy giving planAdd 2 new members to existing legacy giving committeeReinvigorate existing legacy giving committee | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |
| Identify Audiences | Committee membersCurrent Advisory Board membersPast Advisory Board membersFLAGS (Female, Long-time, Aged, Givers) and other donorsLocal professional advisors | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |

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| Phase | Options/Examples | Year | Activities | Notes |
| Determine Donor Communications & Engagement Activities | One-on-one conversationsLegacy giving brochureSocial mediaCommunications (website, newsletters, etc.)MailingsEventsFriend-raisersWills seminarsRecognition receptions | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |
| Monitor &Track Progress  | Separate Excel spreadsheetFolder of donor intent formsAffiliate legacy donor tag in C-Suite | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |
| Legacy Donor Stewardship  | Thank-you card/letterRecognition on website or in newslettersHighlight legacy donors in Affiliate collateral and social media  | Year 1-2 |  |  |
| Year 3-5 |  |  |
| Year 6-10 |  |  |
| Create 2021 Action-Step & Timeline | Recruit committee membersSet goals by Sept 30Before Dec 31, ask 4 board members to consider a legacy gift | Q3 |  |  |
| Q4 |  |  |