**Legacy Conversations tips and outline**

**Setting the Appointment**

* **Introduce** yourself and your affiliation with the organization.
* Explain that you would like **to meet to thank them for their ongoing support and have a conversation with them about the future of the organization, an incredible grant opportunity for the organization, and continuing their wonderful support.**
* Set up **a time and place** to meet (wherever and whenever is best for them).
* Let them know if **someone else** will be joining you.

**Preparing for the Conversation**

* The Legacy Conversation is NOT about the donor’s death.
* The Legacy Conversation is offering the donor an opportunity to do something significant during their lifetime
* Gather information about the donor and his/her family from your legacy team to ensure this is the right time, you are the right person, and this is the right type of gift.

**Conversation**

* Thank for past support
* Ask probing questions to find the emotional connection to the organization or which values they hold most dear
* Listen, observe, and pay attention to their story
* When they have made the case that they care deeply that the organization exists, invite them to partner with you to fulfill their philanthropic desires and ensure your organization continues to exist for future generations
* **Be quiet—allow them to respond—silence is not the enemy here.**
* Thank them no matter what their response
* Thank you note, follow-up, and internal reporting

**Awareness**

* Canned script doesn’t work for a legacy conversation because you are responding to what the donor says – take your conversation cues from the donor.
* Individualized conversation based on the donor’s interests, values, and philanthropic desires
* This is not about what your organization NEEDS, rather, it is about the donor wanting to ensure that the organization will be strong for future generations

**The Path to Success**

The **Right Person** is speaking with the donor

You are Asking for the **Right type of Gift**

This is the **Right time** in the donor’s schedule and life to make this gift

**Ask these types of open-ended Questions:**

* When you think about the Jewish community of Cincinnati 40 years from now, what do you envision?
* When did you make your first gift and to whom?
* Why have you been such a loyal donor/member for the last [number of years]?
* What is the most meaningful experience you have had at this organization?
* What are your dreams for the future of the organization?

**The unanticipated situation**

If the prospect is upset at the organization for some reason) **don’t get defensive** on behalf of your organization, work to understand the situation and their feelings by asking probing questions (without judgement). **Recognize that this is probably not the time to ask for a legacy gift.** Understand what outcome the prospect would like and thank them for their candor.

**Helpful Tips:**

* Use “Yes… and” statements to move the conversation forward.
* Explain the incentive grant opportunity
* Perhaps explain why you decided to make a legacy gift
* Body language and eye contact communicate attention
* Active listening and genuine curiosity are key

**Response:**

* **YES**—Great! Thank and review the Letter of Intent form with them. Explain the opportunity to also choose other organizations. Mention that the LOI is the first step, when they are ready, they will change the legal paperwork to ensure their wishes are followed.
* **MAYBE** (need more time)—Give them a chance to explain their hesitation. Ask if there is any additional information you can provide them that would them with the decision. Set up another time to meet with them, or for a follow – up phone conversation.
* **NO**—ask them if they would share their thoughts and depending on the reason, ask if it would be ok to follow up with them in 6 months or next year.

**Thank them for their time and consideration of your request (or for saying yes!)**

**After the Conversation**

* Send them a handwritten **thank you note** expressing your appreciation of their time (within 48 hours)
* If you are going to **follow-up** with them, remind them in the note.
* Jot down notes from the meeting, (if you did not take them while you were having the conversation) so you can continue to **cultivate** the donor if they didn’t make a commitment or **steward** them if they did.
* **Report back** to your Legacy Team

**Tips for Small Group Presentations** (affinity groups, etc.)

* Start with a **question** like, “what has this organization meant in your life?”
* **Explain** Legacy Program
* **Share** your personal story
* **Answer** any questions
* **Follow up** within two weeks to make an appointment

***Remember—Practice Makes Perfect!***