***Succession Plan:***

* Step 1= Evaluate what was submitted previously and review (Use initial guide below to review/evaluate if your plan is adequate)
  + Your succession plan will outline how your Legacy Team will continue its operations, with a view to long-term sustainability (several cycles down the line, including when YOU are no longer there) and institutionalization. We would suggest putting in place modalities or guidelines for the following items:
    - Roles and responsibilities for team members
    - Terms for team members/volunteer commitment
    - Recruitment of new members: process, frequency, review of donor list, etc.
    - Board relations/overlap: what communications to the Board, what presence on the Board, a designated liaison or team member who represents the team, etc
    - Meetings: frequency, agenda, who’s responsible
    - Donor/Prospect lists: Regular review of prospects and legacy donors (status on confirmation, stewardship, etc)
    - Training! Particularly of new members but also ongoing for team
* Step 2= After evaluating what was submitted, or crafting a plan from scratch, think about what you want to accomplish in the next 12 months that would reflect progress on your succession plan itself. In other words, what will you do from now until May 31, 2022 to contribute to the goals set out in the Succession Plan?

***Board engagement/participation Plan:***

* Evaluate current status/relationship of CYJL and your Board of Directors;
  + If done in the past, review what was submitted;
  + After crafting plan, set goals for 12-month plan
* In crafting a board engagement plan, keep in mind that this plan will outline how you intend to keep your legacy program in front of the Board, as well as making the legacy conversation (or commitment) a requirement for new Board members.
* Questions to consider:
  + How are you integrating legacy giving into your ongoing development efforts?
  + Has your legacy team evolved into a standing committee of the board?
  + Succession plan for legacy committee? Who will serve as chair of committee and who will represent legacy effort on board?
* Examples/Outline include:
  + **Regular presentations**, particularly as new members come on board, on what legacy commitments are, why they are important, the status of your endowment (these may be given by member of your legacy team, Board member, Federation staff, or outside help). Other content ideas:
    - Sharing impact of realized gifts and other impacts re: legacy initiative;
    - Investment results and expenditures of endowment funds on quarterly or annual basis;
    - Specific Board training opportunity;
    - Sharing donor stories;
    - Values-based discussion illuminating essence of legacy giving;
    - How to transform from Fundraising culture to culture of Philanthropy?
  + **Expectation of Board members** when it comes to legacy giving:
    - Mandatory conversation about legacy with each Board member;
    - Training and educating new board members about critical nature of legacy gifts
    - Their participation as Ambassadors of the legacy program-🡪 Stewardship activities, attending events, helping legacy committee with prospecting, spreading the word, etc.
  + **Ongoing agenda item**: the designated legacy team member/liaison should review your current # of commitments, expectancy dollars, celebrate successes, tell stories, present motivational material around legacy, etc.;
  + **Recommended**: one member of Board at least on legacy team, and vice versa;
  + **Review of policies** on an annual basis (spending and gift acceptance)