Camp Legacy Program – 2012-2014

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 bequest gifts for endowment purposes. Six camps completed the three year program and 36 more camps are currently participating. By the end of 2011, we project that these 41 camps will have an estimated 2,400 individuals and families who have made future legacy pledges – collectively valued at more than $60 Million.

The 2012-2014 three-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 and one $5,000 incentive grants upon completion of mutually agreed upon number of donor conversations and donor legacy pledges per year
- Providing travel stipends per training per camp legacy team to attend trainings

What is a legacy gift?

A legacy gift (a.k.a. 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 $50,000-$75,000, however, it is critical to know that any one 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 annual goal 35 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 documented with a signed letter of intent by donors.

GRINSPOON INSTITUTE FOR JEWISH PHILANTHROPY
A PROGRAM OF THE HAROLD GRINSPOON FOUNDATION

AREIVIM LEGACY COMMUNITY PROJECT

Projected Timeline

January –April 2012

- Informational phone call Wednesday, January 18 at 7pm EST
- In-person training session for all team members in Western MA – Sunday, February 12 from 10 am - 3 pm
- Regular (bi-monthly) coaching of camp legacy teams by e-mail, telephone and webinars
- Camp completes legacy action plan including timelines, measurable outcomes, marketing, and management

May – October 2012

- Camp Legacy Teams implement action plans by meeting with donors

November – December 2012

- Continued implementation of action plans
- 2nd training session for all team members (in conjunction with Grinspoon camp conference on November 4 & 5 in western Massachusetts)
- Participants and program directors outline 2013 program year schedule

2013-2014

- Continued implementation of Action Plans
- At least one in-person workshop in November 2013

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; 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)

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