



Camp Legacy Program Overview and Application

Camp Legacy is a program of the Grinspoon Institute for Jewish Philanthropy to help your organization's professional and lay leadership secure bequests and planned gifts. The program will provide you with tools and motivation to approach loyal donors and discuss making planned gifts for endowment to benefit the organization after their lifetime.

Through this collaboration, your organization will receive training, consulting, coaching and marketing materials. Your organization will also receive two \$10,000 incentive grants and one \$5,000 grant payable upon the reaching defined measurable actions over a 3-year period. The Camp Legacy Program will require your Legacy Team of at least one senior professional and at least 2 lay leaders to participate in group and individual sessions.

Please complete the application and return by email only to:

Marcus Simon
Marcus@hgf.org

The application is due by December 9, 2011.

Please feel free to call for further information:

David Sharken
413 439-1955
david@hgf.org



Camp Legacy Program Application

Name of Organization:

Executive/Camp Director:

When did s/he start in this position?

Development Director:

When did s/he start in this position?

Full time or Part-time?

Board Chair/President:

When did s/he start in this position?

Please answer all the following questions

1. Organizational Information –
Annual budget:
Board size:
Number of active volunteers:
Annual campaign amount:
Number of donors to annual campaign:
2. Briefly describe your organization’s fundraising programs and history including annual, capital, endowment, emergency or other campaigns:
3. At what donation level do you consider a donor to be a “major donor”?
According to this definition, how many major donors do you have at this time?
4. What software do you have that tracks all contacts and all donations for your donors?
Which paid staff at your organization is responsible for updating your donor information?



5. Does your organization currently have an endowment? YES NO

If YES,

What is the current market value?

How was the endowment raised?

How much does it provide annually, and how are those funds currently used?

Can the endowment principal be invaded?

6. All gifts given to your agency through the Camp Legacy Program must be held in an appropriate community based organization such as a Jewish Endowment Foundation. Please indicate the name of this organization that your board has (or will) approve to be the custodian of your legacy funds:

7. Has your organization received bequests or other planned gifts in the last five years?

YES NO

If YES,

How many such gifts?

Approximate total amount?

Are you currently aware of any bequests or other planned gifts likely to be made?

Do you have in writing the arrangements for making these gifts?

7. Your Camp Legacy Team:

Please provide us information for each of your team members (at least one professional and at least two lay leaders):

<u>Name</u>	<u>Role</u>	<u>Years of Service</u>	<u>Email</u>	<u>Telephone</u>

8. Can each member of your Camp Legacy Team commit to all of the following:



- 2 one-day workshops in 2012 (tentatively scheduled in Springfield, MA for February 12, 2012 and November 11-12, 2012)
- Bi-Monthly group phone calls or webinars
- Implementation of a legacy action plan to be developed

YES NO

Please email completed application by December 9, 2011 to:

Marcus Simon

Marcus@hgf.org