 

**LEGACY STEWARDSHIP CHECKLIST**

\_\_\_\_\_\_\_ **Send a personalized handwritten thank you note**

**\_\_\_\_\_\_\_\_\_ Within 48 hours of receiving Declaration of Intent**

**\_\_\_\_\_\_\_\_\_ Within 48 hours of receiving confirmation of formalized gift**

**\_\_\_\_\_\_\_\_\_ Periodically to show appreciation for their commitment**

\_\_\_\_\_\_\_ **Personal phone call**

\_\_\_\_\_\_\_\_ **A week after receiving Declaration of Intent**

\_\_\_\_\_\_\_\_ **A week after receiving confirmation of formalized gift**

**\_\_\_\_\_\_\_\_\_ Periodically to stay in touch and keep informed/engaged**

**\_\_\_\_\_\_\_\_ Personal meetings**

**\_\_\_\_\_\_\_\_\_ To discuss formalization of commitment**

**\_\_\_\_\_\_\_\_\_ Periodically to stay in touch and keep informed/engaged**

\_\_\_\_\_\_\_ **Keep accurate records** of all interactions with donor – separate file for each

\_\_\_\_\_\_\_ **Donor Recognition**

\_\_\_\_\_\_\_ **Public listings** – website, newsletters, annual report, in lobby, in event materials

\_\_\_\_\_\_\_ **Personal notes/cards** – birthdays, holidays, with articles of interest, with invitation to organizational event

\_\_\_\_\_\_\_ **Special legacy donor events** – to honor their commitment to your organization

\_\_\_\_\_\_\_ **Small gifts** – if fits with your organization’s culture

\_\_\_\_\_\_\_ **At organizational events** – annual meeting, gala, major donor’s event

\_\_\_\_\_\_\_ **Ongoing Communication –** Letters/Newsletters – **minimum of 4 times a year**

\_\_\_\_\_\_\_ **Engagement**

\_\_\_\_\_\_\_ **Ask to speak at or host a legacy event**

\_\_\_\_\_\_\_ **Invite to** **join a committee**

\_\_\_\_\_\_\_ **Invite to attend a non-legacy special event**

\_\_\_\_\_\_\_ **Honor at a Legacy Shabbat or other organizational event**  
  
\_\_\_\_\_\_\_ **Share their story – Printed or video testimonial**

\_\_\_\_\_\_\_ **Use Funds Wisely**

\_\_\_\_\_\_\_ **Invest endowment funds with trusted partner**

**\_\_\_\_\_\_\_\_ Maintain a state of financial well-being**

**\_\_\_\_\_\_\_\_ Use donor’s funds as they intended**

**\_\_\_\_\_\_\_\_ Report Your Impact**

**\_\_\_\_\_\_\_\_\_ In newsletters and letters**

**\_\_\_\_\_\_\_\_\_ In annual reports and at annual meetings**

**\_\_\_\_\_\_\_\_\_** **On website**

**\_\_\_\_\_\_\_\_\_ Organize and manage stewardship in conformity with the Donor Bill of Rights**

*\_\_\_\_\_\_\_\_\_* **Other Stewardship Activities**

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*Developed by Arlene D. Schiff, National Director  
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