

Three Flavors of Legacy Societies
A Living Case Study
PPGC September 20, 2022

1



Catherine Kort - *Health and Human Services/Children and Families*
Lisa Thomas - *Casa Dorinda, Seniors*
Jill Rode, CFRE - *Music Academy of the West, Arts*
Andy Ragone - *Moderator*

2

Agenda

- Setting the Stage
- Legacy Societies
- Marketing
- Fundraising
- Success
- Q&A

3

Setting the Stage

- Quick overview:
 - What to expect - what each panelist will emphasize
 - Panel questions:
 1. What is your role in your organization and what responsibilities do you have? How long have you been in planned giving and what made you decide to add this to your expertise? How large is your fundraising team?
 2. How did you start your PG program or was it already in place? Where would you say you are at with your program's stage of development?

4

Legacy Societies

- Panel questions:
 1. Why do you think a legacy society is beneficial? How is it different in your organization/industry than the others on the panel?
 2. What was your first step in starting or enhancing your legacy society?
 3. How has COVID affected your role and plans for your society?
 4. How do you find prospects for the society?
 5. How do you steward your legacy donors?

5

Many Flavors...

- See resource pages and contact information at end of presentation deck
- Images and examples to be provided day of presentation and upon request

6

Marketing

- Panel questions

1. How do you market your society?
2. What are the benefits and how do you recognize society members?

7

Fundraising

- Panel Questions

1. How is your board involved? Do you engage volunteers in your planned giving efforts?
2. When you have a fundraising campaign, do you include the society as an ask?
3. How easy is it for supporters to make a legacy gift to your organization?

8

Success

- Panel questions

1. What do you most attribute to your legacy society's success?
2. What do you recommend to kick start or reinvigorate a planned giving program or Legacy Society?

9

Q&A

10

Resources:

Children's Legacy Society - CALM

- [Website](#)
 - [Donor Stories](#)
 - [Legacy Society](#)
 - [Archived eNewsletters](#)
- [Brochure](#)
- [Survey Questions](#)
 - [Survey Outcomes Report](#)

11

Resources continued..

Encore Society – Music Academy of the West

- [Website](#)
 - [Donor Stories](#)
 - [Legacy Society](#)
- [Endowment Giving](#)

12

Resources continued

Sequoia Society – Casa Dorinda

- [Website/Legacy Society](#)
- [Brochure/Donor Stories](#)

13

Contact Information

- Jill Rode, CFRE
- jrode@musicacademy.org
- 805-695-7911

- Catherine Kort
- ckort@msn.com
- 805-206-8663

- Lisa Thomas
- lthomas@casadorinda.org
- 805-969-8070

14

PRACTICAL PLANNED GIVING CONFERENCE SPEAKER EVALUATION

Date: _____ Speaker: _____

Name (optional): _____

Please rate the following:

	Excellent	Good	Neutral	Fair	Poor
I. OVERALL	5	4	3	2	1
Were your major objectives for this session met? Was the content of the session vital, timely, substantive?					
Comments: _____					

II. RELEVANCE	5	4	3	2	1
Was the subject matter directly related to the requirements of your job?					
Comments: _____					

III. VALUE	5	4	3	2	1
Do you believe the benefits of this session were worth the time, effort and cost?					
Comments: _____					

IV. SPEAKER	5	4	3	2	1
How was their presentation style? Did the session move along at the right pace? Did they have appropriate knowledge on the topic?					
Comments: _____					

V. MATERIALS	5	4	3	2	1
Were the materials clear and organized and appropriately helpful for the session?					
Comments: _____					

Vi. What did you like the most about the session?

VI. Any suggestions to improve future sessions?

XII. How many years of gift planning experience do you have? _____