Honorary Membership: Legacy Society and Donor Stewardship Best Practices
PANEL OUTLINE & QUESTIONS

OUTLINE:

1. Introductions of Panelists, Organization, and Legacy Societies (20 minutes)
2. Structured Questions (30 min)
3. Final Q&A (10 min)

INTRODUCTIONS - 5-7 minutes for each speaker

- Who are you
- Introduce your legacy society:
    - History – include the "why" behind your society (gift fulfillment, marketing, cultivation/pipeline development, donor retention, etc. Does it primarily exist for your nonprofit to be able to organize these donors? Any reason is valid.)
    - Legacy Society Name
    - Parameters:
        - How does a donor get into your legacy society
        - How many members
        - Do you count (revocable) planned gifts?

QUESTIONS:
How Do You Steward Your PG Donors and Use Your Legacy Society?

1. Who is responsible for stewardship? What is the most basic stewardship plan for planned givers? High impact activities/practices you do?

2. What would you never do again? Lessons learned

3. How do you manage these donors in your org? How to steward donors who don't fit into major gift donors and who might never make another gift? (Broad vs. individual.") They say "don't pay attention to me, I don't need anything special."

4. Why should leadership, gift officers, and program folks in your organization care about legacy society donors and how have you successfully partnered with them to create great stewardship opportunities?

5. Where is the best place to start as a small shop, or if you have limited resources, or if you are working to revamp planned giving stewardship? What is the ONE thing you'd absolutely do?

Other Important Considerations:

6. How do you focus on the younger donors/pipeline building? E.g. donors in their first job filling out beneficiary designations. Do you treat 30 year old legacy society donors the same as 80 yo donors?

7. Data Tracking & Data Security? How do you store details about individuals' estate commitments or financials? What about copies of their estate plan that they share with you? Do you allow gift officers or institutional leadership to view this information?

Final thoughts (if there is time!) - last piece of advice or major take-away.