



Legacy Giving Program Phases

Purpose

To educate, inform, and create awareness to parishioners about the importance of having an updated Will with a provision made for parish or ministry as a beneficiary.

Goals

The goals of the Legacy Program are to:

1. Offer leadership opportunities to parishioners willing to donate their time and a talent to a legacy program committee, thereby strengthening parish stewardship, and
2. Foster legacy giving whereby all practicing Catholics have an updated Will that includes legacy gifts to their parish, and
3. Grow the parish's Lumen Christi Legacy Society.

Timeline

The program is a 10-month plan

- Foundation: September
- Communicate: October
- Launch: November or January
- Educate: Before or After Easter
- Solicit: No solicitation in the year working with Director of Planned Giving
- Recognize: May
- Five Year Plan: June
- Steward: Educate, Inform, Build Awareness, Ongoing

Foundation

- Create a Parish Case Statement (*examples provided by CCF*)
- Create a Legacy Committee Job Description (*examples provided by CCF*)
- Gift Acceptance Policy (*provided by CCF*)
- Create Collateral Materials (*provided by CCF*)
- Establish a Lumen Christi Legacy Society (*logo provided by CCF*)
- Tracking & Reporting Lumen Christi Legacy Society Members and Bequests

Communicate

- List all communications channels used by parish (i.e. Flocknotes, MailChimp, website, bulletin, social media, email signature, annual report, newsletter, etc.)
- Determine communication channels to be used to educate, inform, and create awareness about legacy giving and number of touch points monthly

- Set a date for Launch Weekend to announce parish-wide the legacy program (*materials provided by CCF*)
- Create a 10-month communication/marketing plan about legacy giving (*template provided by CCF*)
- Utilize over 300 bulletin blurbs on estate and legacy planning (*provided by the CCF*)

Launch

- Launch weekend is when the pastor and legacy committee make a 'big splash' about the legacy program and new Lumen Christi Legacy Society (*scripts and materials provided by CCF*)

Educate

- Promote educational seminar (*3 weeks of promotion; materials are branded and provided by the CCF*)
- Host the Director of Planned Giving's educational seminar: "*Get Your Affairs in Order-4 things you family will thank you for*". Topics include: Wills, Trusts, Advanced Medical Directives, Legacy Planning, and Funeral Planning

Solicit

- Identify events where you can fold in the Lumen Christi Legacy Society members to what you are already doing
- Plan a mailing by segmenting those identified and have a call to action/response card.
 - Mailings to targeted to key volunteers and leadership
 - Parishioners age 65+ who have made annual gifts for 3 or more years
 - Daily Mass attendees

Recognize

- Hold an annual Mass and breakfast/luncheon/reception to recognize and thank Lumen Christi Legacy Society (LCLS) members
- Offer the LCLS members in the Prayer of the Faithful at All Souls Day Mass

Legacy Program 5 Year Plan & Program Stewardship:

- Maintain the relationship between the LCLS members and the parish. It should be the 'ongoing' way to keep regular contact with them'. Include recognition events (i.e. annual Mass & luncheon), special invitations to programs or private dinners with the pastor, special intentions at Mass, birthday phone calls, etc. The opportunities for touch points are endless and will vary depending on the size and culture of each parish.
- The Legacy Committee should confer at least twice a year to update legacy giving marketing and communications, host 1 educational event a year (i.e. seminars/talks by Probate Clerk, Social Security Administration staff, funeral director, Catholic physician on medical directives, etc.) and evaluate the program annually to determine if it is meeting its goals.