



Job Description for Legacy Team Members

Timeline: January 2012 – December 2013

Time commitment

- 1-2 hours/month for meetings (in person or by phone) = 12-24/year
- 1-2 hours/month for email review and preparation = 12-24/year
- 8 hours/twice year for trainings = 16/year
- 2-3 hours/month for personal meetings with prospective donors = 24-36/year

Total = 64 - 100 hours/year (averages 5-8 hours/month)

Your job

- Take time to read background information and go through trainings to prepare for your role and to understand the Legacy fund-raising process.
- Provide timely responses to communication and requests.
- Follow through on assignments as expediently as possible.
- Provide clear input to professional staff, other team members and the Legacy coach.
- Operate as a member of the team and celebrate each other's successes.
- Make your own Legacy gift.
- Identify prospective Legacy donors from your community and respect confidentiality.
- Be open to approaching others to talk about their potential Legacy gift.
- Raise philanthropy and donor stewardship to new levels of importance and integrity for your organization.
- Assist in stewardship and communication efforts.

Important Dates for 2012:

- January 18th - call @ 7:00 pm EST answering questions on program
- February 12th - in-person Orientation to program
- March 2nd - work plans due for 2012
- Week of March 5th - individual team phone calls with David & mentor
- May - group call with David & mentors (date TBD)
- September 10th - progress reports due
- November 4th & 5th - Grinspoon Institute Annual Conference
- December 31st - formal end of program year (year-end report and all incentive award documentation due in mid-January 2013)