

GOAL 1: GENERATE INTEREST IN THE LEGACY SOCIETY BY CONTACTING CURRENT AND PAST BOARD MEMBERS

Objective	Activities	Lead	Timeline	Progress	Notes
1. Develop Legacy Society marketing materials for development packets	Research currently available materials through CMF	Cathy	24-Oct-07	Tools for Giving materials currently available	CMF is launching new materials at the annual conference, October 21 Marketing materials sent to committee
	Local design finalized	Development Committee	31-Oct-07		
	Materials ready for distribution	Printer Cathy	14-Jan-08	Materials Ready	
2. Solicit Current and Past Board members	LS Packets assembled	volunteers	week of Jan 21,08	Completed	
	LS Packets distributed to Current Board Member	Cathy	January 31 board meeting	Distributed	
3. Solicit core group of donors	LS Packets mailed to past board members/ concurrently w/identified core donors	Cathy Linda/ mailing labels Board members traveling to donor area	1st 5 board/group core February		
			2nd 5 board/group core follow up Feb mailing March		
			3rd 5 board/group core follow up March mailing April		
			4th 5 board/group core follow up April mailing May		
			5th 5 board/group core follow up May mailing June		
			6th 5 board/group core follow up June mailing July - October		

GOAL 2: PLANNED GIVING EDUCATION TO PROFESSIONAL ADVISORS AND PUBLIC

Objective	Activities	Lead	Timeline	Progress	Notes
1. Educate Key Professional Advisors	Identify critical core of professionals who will agree to serve on an ad hoc PA committee	Cathy Roger Zappa John Maki	30-Oct-07	completed	Diane Gauthier Jim Steward Kara Applecamp Sue Widemen John Maki Craig Etelamaki
	Create planned giving education presentation to give to PA	Cathy Ad Hoc Committee	31-Jan-04	needs editing	
	Facilitate meeting with PA to disseminate planned giving information to field	Cathy Carole	1st quarter, 2008 2nd quarter, 2008 3rd quarter, 2008 4th quarter, 2008		
	Host gathering for PA	Cathy Mark Canale	TBA		

3. LEVERAGE EXISTING AND CREATE NEW PARTNERSHIP

Objective	Activities	Lead	Timeline	Progress	Notes
1. Educate current member agencies -24	Meet with Development Director of a current agency to present materials and propose endowment development	Cathy	2 in 1st quarter 2 in 2nd quarter 2 in 3rd quarter 2 in 4th quarter		
	Present to agency boards	Cathy Board members	2 in 1st quarter 2 in 2nd quarter 2 in 3rd quarter 2 in 4th quarter		
	Assist in identifying core donor base of agency	Cathy	2 in 1st quarter 2 in 2nd quarter 2 in 3rd quarter 2 in 4th quarter		

2. Establish new agency endowments	Make personal contact with agency Dev. Director	Cathy Board members	2 in 1st quarter 2 in 2nd quarter 2 in 3rd quarter 2 in 4th quarter		
	Meet with Directors of agencies currently w/o endowment funds	Cathy	1 in 1st quarter 1 in 2nd quarter 1 in 3rd quarter 1 in 4th quarter		
	Present to board of agencies without endowments	Cathy Board members	1 in 1st quarter 1 in 2nd quarter 1 in 3rd quarter 1 in 4th quarter		
	Assist in identification of individuals for major gift to establish endowment	Cathy Director of agency	1 in 1st quarter 1 in 2nd quarter 1 in 3rd quarter 1 in 4th quarter		
	Assist in identification of core donor base for continued support	Cathy Director of Agency	1 in 1st quarter 1 in 2nd quarter 1 in 3rd quarter 1 in 4th quarter		
	Assist in personal contacts with major gift donors and core donors	Cathy Director of Agency	1 in 1st quarter 1 in 2nd quarter 1 in 3rd quarter 1 in 4th quarter		

GOAL 4: CONTINUE THE PUBLIC RELATIONS PROGRAM/CREATE PUBLIC AWARENESS

Objective	Activities	Lead	Timeline	Progress	Notes
1. Use Media to publicize activities of MCF	1. 20th anniversary, with History, progress and impact	Cathy	February		
	2. Transfer of Wealth Info	Cathy	March		

3. Legacy Society	Cathy	April		
4. LS member profile	Cathy	May June July August September		
5. Ryan Report with info on TOW, LS, 20th	Cathy Board member	TBA		
6. Use TVY Upside segment for grant impact	Cathy	Submit 1/mo February - September		
7. Media Meet on TV13 for TOW, LS, 20th	Cathy	early September		
8. Add TOW and LS pages to website	Cathy web designer	by end of first quarter		
9. Incorporate into Annual Report	Cathy AR Designer	by end of 2nd quarter		