



USAFA Class of 1973 Legacy Gift Planning Action Plan

**Prepared by Dale Zschoche
30 November 2016**

Your class has been extraordinarily generous in supporting programs to help the Academy prepare cadets for USAF leadership, particularly through the '73 NCLS Endowment, for which we are grateful. The Class of '73 has now declared as a long-term goal to encourage classmates to continue their generosity by leaving a legacy gift to the Academy, extending philanthropy beyond a lifetime. Persons who establish legacy gifts will credit the Class of '73, and qualify for membership in the Polaris Society, a recognition program for which there is no further obligation. As you look towards your 50th class reunion in 2023, developing a strategy at this early date will enable opportunities to socialize and engage with your classmates about legacy giving, which is a process requiring time to plan and execute. Following is a proposed action plan and timetable. The USAFA Endowment is honored to partner with you in this process.

Several assumptions:

1. The desired objective is to secure legacy commitments from '73 class members by the 50th reunion, in order to make an announcement at that time of the number of Polaris Society members, and the donation amount possible from these future gifts
2. The emphasis of the 50th reunion gift project will be legacy commitments, but current giving options will also be possible
3. In addition to legacy gifts commonly associated with charitable bequests in wills/trusts, classmates will be encouraged to consider life income and other gift plans as may be appropriate to their personal situation
4. Because of the complexity of this manner of giving, the USAFA Endowment is prepared to provide a great degree of information, assistance with the class members and their advisors, and support to the committee
5. For reporting purposes, the dollar amount of '73 legacy commitments will be determined on the same basis as the Endowment's campaign accounting standards
6. We may wish to name this effort, with one suggestion being "Preserving '73's USAFA Legacy"

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Phase One: Working with the '73 Executive and Reunion Gift Committees

Because it is important for the class leadership to demonstrate their dedication to this project, all members of the two committees will be encouraged to take action personally to qualify for the Polaris Society. The USAFA Endowment staff shall engage with each committee member to educate and facilitate legacy giving so that by the start of the public phase coinciding with the 45th reunion, the other class members will see the example set by the committees.

Timeline and responsible parties:

1. December 2016: Legacy planning information sent to all committee members – DZ
2. Jan-June 2017: Personal contact with members to discuss options and offer assistance – Endowment staff, coordinated by DZ
3. July-Nov 2017: Follow-up and further assistance – DZ
4. Nov 2017 – Volunteer training of committee members on how to help the Endowment by “Opening Doors” to classmates – Endowment staff
5. Dec 2017: Review of progress, and tactics to complete this phase – '73 Exec Committee and Endowment staff

Phase Two: “Public Stage”

Once the '73 committee members have been successfully enrolled in the Polaris Society, we will then begin to engage the rest of the class towards the same objective.

Timeline and responsible parties:

1. March 2018: Pre-reunion legacy campaign announcement – letter (with testimonials) signed by committee, sent by Endowment
2. May 2018: 45th reunion Legacy Seminar “save the date” sent – Endowment
3. August 2018: Legacy Seminar invitation sent – Endowment
4. Post-reunion (Nov 2018): Legacy packet sent to all class members – Endowment

Phase Three: 45th Reunion Plans

Specifically at the 45th reunion we should plan to do the following:

1. Feature the '73 Legacy campaign information in the reunion packets, on posters and with announcements at the functions – Committee (Endowment provides materials)
2. Conduct several Legacy Seminars during the reunion – Endowment



Phase Four: Further public phase actions and prioritizing personal contacts

During the 2019-22 timeframe, regular follow-up information should be delivered, in a variety of methods, by the Endowment. This would include encouragement messages from the '73 Committees. Other actions:

1. Squadron reps (Polaris Society members) need to reach out to their squadron mates – coordinated by Committees
2. Those class members who have expressed a desire to learn more, or who have been identified as possible prospects for higher-level gifts, will be evaluated and prioritized, with the ideal action being personal contacts by Endowment staff
3. Progress reports sent to the class

Phase Five: Preparations for the 50th Reunion

As the Class of '73 focuses on their 50th reunion, the '73 Legacy Campaign should receive prominence in the communications to the class. In mid-2023 plans need to be finalized for the campaign announcement of the total amount committed, and the Polaris Society member number.

Phase Six: Celebration and Stewardship

During the '73 50th reunion, the '73 Legacy Campaign results should be proudly announced in many forums, including as examples:

1. Celebratory flyers in the reunion packets
2. Banners
3. A check presentation at the Falcon football game
4. Tributes at the class dinner

Then, an essential post-reunion action is to conduct continual stewardship of the '73 Polaris Society members and spouses. This will primarily be a responsibility of the Endowment, but a final report and thank-you letter should be sent to all class members over the signatures of the committees.

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The USAFA Endowment is not engaged in rendering legal or tax advisory service. For advice or assistance in specific cases, the services of an attorney and/or other professional advisors should be obtained.

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