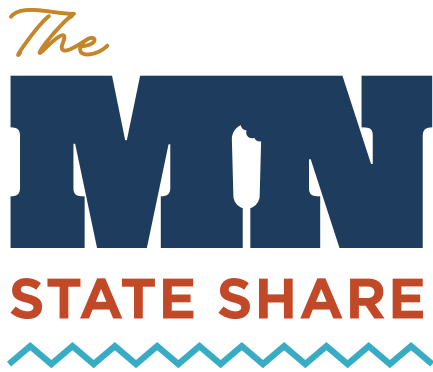




TRANSFER OF WEALTH

READINESS GUIDE & WORKSHEETS



mnstateshare.org



© 2025 The MN State Share. All Rights Reserved.

ASSESS YOUR ORGANIZATION'S TRANSFER OF WEALTH READINESS

Instructions: For each of the five pillars below, review the descriptions and select the level that best describes your current state. Be honest, this tool is for your internal planning only.

Relationships with Advisors	LOW READINESS: We have few or no active relationships with advisors. We're unsure how to engage them. MEDIUM READINESS: We know a few advisors and have occasional interactions, but it's not consistent or strategic. HIGH READINESS: We have strong, trusted relationships with multiple advisors who received tailored communications and engagement from us.
Fostering a culture of abundance	LOW READINESS: Giving is mostly private or transactional. We rarely communicate about local giving or celebrate it publicly. Community members may not see philanthropy as relevant. MEDIUM READINESS: We share giving stories occasionally and engage individuals well. Some community members recognize us as a local giving option, but there's limited visibility or momentum at the community level. HIGH READINESS: We foster a visible culture of abundance, where giving is seen as meaningful, possible, and expected. We promote local philanthropy through stories, events, and shared success. The community sees giving as something we do together.
Ability to Accept Diverse Gifts	LOW READINESS: We mainly accept cash gifts and are unsure how we would process or what we would do with more complex assets. MEDIUM READINESS: We've accepted some non-cash gifts or have policies in place, but we're still learning. HIGH READINESS: We are confident and equipped to handle a range of gift types or know who we partner with (e.g. a community foundation) to do that.
Relational engagements	LOW READINESS: Donor conversations focus mostly on immediate needs or one-time appeals. MEDIUM READINESS: We talk with donors about impact, but don't consistently explore their long-term goals or legacy. HIGH READINESS: We have deep, relational conversations with donors about their values, dreams, and giving journey.
Proof of Effective, Enduring Impact	LOW READINESS: We don't consistently track or share the long-term results of donor contributions. MEDIUM READINESS: We have some impact data and stories, but they're not yet tied to long-term or legacy giving. HIGH READINESS: We clearly show how gifts are used and sustained over time, and have stories and evidence to prove it.

ARE YOU READY? ADD UP YOUR SCORE:

Instructions: Mark/identify/measure your readiness (low, medium, high) in each pillar. Based on this assessment, my priority pillars for the next 6 month are:

Relationships with Advisors	☐ ☐ ☐	Based on this assessment, my priority pillars for the next 6 month are: 1. _____ 2. _____ 3. _____
Fostering a Culture of Abundance	☐ ☐ ☐	
Ability to Accept Diverse Gifts	☐ ☐ ☐	
Relational Engagements	☐ ☐ ☐	
Proof of Effective, Enduring Impact	☐ ☐ ☐	

TOOLKIT NAVIGATION GUIDE

Instructions: Use this chart to decide where to go next and which tools to use, based on your readiness scores. You can find all of the tools and links to the Canva materials at mnstateshare.org.

Relationships with Advisors	☐ LOW READINESS: Start by looking within your own networks (staff, board members, volunteers, or donors) to identify advisors you already know and begin there. Share the Advisor Engagement brochure to build understanding of how you can work together. ☐ MEDIUM READINESS: Host a Friendraiser event for trusted advisors using the template provided. This helps deepen relationships and positions your organization as a partner in legacy planning. ☐ HIGH READINESS: Leverage your strong advisor network to co-brand and actively promote the “Why Community Foundations?” message. Encourage advisors to share this with their clients as a way to keep giving local.

READINESS NAVIGATION GUIDE, CONT'D...

Fostering a culture of abundance

- **LOW READINESS:** Begin using the [MN State Share](#) materials to elevate community giving. Sharing stories, messages, and visuals helps socialize philanthropy as a community norm. Add [MN State Share](#) messaging to your regular communications platforms like emails, newsletters, and social media.
- **MEDIUM READINESS:** Use the [MN State Share presentation](#) and adaptable script to raise awareness at board meetings, community gatherings, or public events. Ask your board members to engage their networks in conversations about the great transfer of wealth.
- **HIGH READINESS:** Celebrate your success publicly by writing a short publication or blog about a recent event or initiative that fostered giving. Consider hosting a peer learning workshop to teach others how you've built a culture of generosity in your community.

Ability to Accept Diverse Gifts

- **LOW READINESS:** If you aren't equipped to accept non-cash gifts, identify a partner (like a local community foundation) and formalize an agreement to work together.
- **MEDIUM READINESS:** Share your gift acceptance policies broadly with advisors and donors to build awareness of the many ways supporters can contribute.
- **HIGH READINESS:** Integrate language about non-cash gifts into your donor-facing materials, including your 1-pagers and event remarks. Share specific stories on your blog, in your newsletter, or through social posts and Friendraiser events that show how non-cash gifts have made an impact in your community.

Relational engagements

- **LOW READINESS:** Identify your top 15-20 donors (based on giving frequency or amount) and develop a stewardship plan for each with a focus on rich, values-driven conversations.
- **MEDIUM READINESS:** Host a Friendraiser event using prompts and themes from the [MN State Share](#) campaign to deepen relationships and understand donor motivations.
- **HIGH READINESS:** For well-stewarded donors, begin complex legacy or estate planning conversations. These trusted relationships are ready for deeper, long-term engagement.

Proof of Effective, Enduring Impact

- **LOW READINESS:** Draft or update impact stories and share them regularly across your communications channels. Make sure your annual reports and IRS 990s are easy to find on your website.
- **MEDIUM READINESS:** Add key statistics and impact stories to your communications materials to make the case for long-term giving. Make success stories a regular part of your communications calendar.
- **HIGH READINESS:** Submit a story or data point to be included in local, regional, or statewide storytelling efforts through partners like the Minnesota Council on Foundations or Minnesota Council of Nonprofits.