

# LEGACY DONOR STORY

Writing Checklist for Wildlife Habitat Preservation Nonprofits

*Wildlife Conservation Storyteller • wildlifeconservationstoryteller.com*

*A well-crafted legacy story is not a fundraising pitch — it is an act of witness. Use this checklist to ensure every story earns its place on the page.*

## 1

### BEFORE YOU WRITE — RESEARCH & DISCOVERY

<input type="checkbox"/>	<b>Donor Interview Completed</b>	Conduct a warm, unhurried conversation. Ask open-ended questions about the first time they encountered this habitat or species.
<input type="checkbox"/>	<b>Origin Moment Identified</b>	Find the precise memory — the morning, the field, the bird call — that opened their eyes. That moment is the story's heartbeat.
<input type="checkbox"/>	<b>Emotional Hook Captured</b>	Note the words they use spontaneously. Donors rarely speak in abstractions; harvest their natural language for authentic quotes.
<input type="checkbox"/>	<b>Conservation Stakes Clarified</b>	Identify the specific habitat, species, or ecosystem at risk and why loss is irreversible. Anchor urgency in verifiable fact.
<input type="checkbox"/>	<b>Impact Data in Hand</b>	Gather at least one concrete, measurable outcome their gift enabled: acres preserved, nesting pairs recovered, waterway miles restored.

**RESEARCH TIP:** Ask the donor: 'Can you describe what you saw, heard, or smelled the first time you truly fell in love with this place?' Sensory memory unlocks the most powerful quotes.

## 2

### THE OPENING — PLACE THE READER INSIDE THE SCENE

<input type="checkbox"/>	<b>Sensory Lead</b>	Open with sight, sound, smell, or touch. Drop the reader into the habitat before introducing the donor. (e.g., amber marsh light, the rasp of sandhill cranes)
<input type="checkbox"/>	<b>No Jargon in the Lead</b>	Avoid 'planned giving,' 'bequest,' or 'legacy gift' in the first paragraph. Lead with story; let the gift emerge naturally.
<input type="checkbox"/>	<b>Immediate Emotional Stakes</b>	Within the first 50 words, the reader should feel why this habitat matters — not just know it intellectually.
<input type="checkbox"/>	<b>Protagonist Introduced</b>	Name the donor and offer one vivid, humanizing detail that is not their job title or wealth. (e.g., 'a retired schoolteacher who kept binoculars on her kitchen windowsill')

**AUDUBON MODEL:** *The Ingleton story opens with a grandmother splinting a mockingbird's wing — one image that communicates decades of love and sets the emotional contract for everything that follows.*

### 3 THE DONOR'S VOICE — QUOTES THAT CARRY THE STORY

<input type="checkbox"/>	<b>First-Person Quote on Love</b>	Include a direct quote explaining what drew them to this specific habitat or species. Must be emotional, not procedural.
<input type="checkbox"/>	<b>Quote on Why Now</b>	Include a quote about why they chose to act through a legacy gift — their sense of time, mortality, and generativity.
<input type="checkbox"/>	<b>Quote on Future Vision</b>	Capture what they hope future generations will experience because of their gift. Forward-looking language is deeply persuasive.
<input type="checkbox"/>	<b>Quotes Are Donor's Own Words</b>	Do not paraphrase quotes into polished copy-speak. Preserve the donor's voice, cadence, and even slight informality — it signals authenticity.
<input type="checkbox"/>	<b>Maximum 3–4 Quotes</b>	One powerful quote per story beat. More than four quotes slows pace and dilutes impact.

**TNC MODEL:** *TNC's donor stories routinely feature a quote about the donor's core 'why' — often philosophical: 'It's the idea of repairing the world.' That single phrase carried an entire campaign.*

### 4 SENSORY LANGUAGE — MAKE THE HABITAT REAL

<input type="checkbox"/>	<b>At Least Two Senses Engaged</b>	Go beyond sight. Add sound (wings, water, wind), smell (salt marsh, pine duff, tide wrack), or touch (cold water, rough bark).
<input type="checkbox"/>	<b>Specific Over Generic</b>	Write 'a roseate spoonbill trailing pink against the mangroves' — not 'a beautiful bird.' Precision creates credibility and beauty simultaneously.
<input type="checkbox"/>	<b>Active, Present-Tense Scene</b>	At least one scene should feel live and immediate. Past tense for backstory; present tense for the habitat itself.
<input type="checkbox"/>	<b>No Purple Prose</b>	Every sensory detail must earn its place by advancing emotion or demonstrating what is at stake. Cut ornamental language ruthlessly.

### 5 CONSERVATION IMPACT — PROOF THAT THE GIFT WORKS

<input type="checkbox"/>	<b>Specific Outcome Named</b>	State exactly what the legacy gift made possible: acres acquired, species recovery milestone, restoration project funded.
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<input type="checkbox"/>	<b>Before/After or Without- With Frame</b>	Show the reader what existed — or what would have been lost — without this donor's vision. Contrast is the engine of urgency.
<input type="checkbox"/>	<b>Time Horizon Established</b>	Clarify that the impact will continue beyond the donor's lifetime. This is the core psychological appeal of legacy giving.
<input type="checkbox"/>	<b>Organization's Track Record Affirmed</b>	One sentence affirming the organization's stewardship credibility. Donors leave legacies to institutions they trust to outlast them.

**ROWE SANCTUARY MODEL:** *Audubon's Sandhill Crane story names a specific acreage (750 acres, Platte River), a specific woman, and a specific decade — transforming an abstract bequest into a landmark anyone can visit. That is the standard.*

## 6 IDENTITY & LEGACY PSYCHOLOGY — THE INTERIOR JOURNEY

<input type="checkbox"/>	<b>Generativity Theme Present</b>	The story should reflect the donor's desire to contribute something that will outlast them — a gift to future generations, not just the organization.
<input type="checkbox"/>	<b>Donor's Values Reflected, Not Just Cause</b>	The best legacy stories reveal who the donor is — their justice, their wonder, their sense of beauty — not merely what they gave.
<input type="checkbox"/>	<b>Community/Belonging Element</b>	Where possible, show the donor as part of a community of like-minded stewards. ('She joined others who believe that...')
<input type="checkbox"/>	<b>No Financial Language Dominates</b>	Estate planning mechanics belong in sidebars or FAQs, not in the story. The story is about love and legacy — not tax efficiency.

## 7 STRUCTURE & CRAFT — SHAPE THAT SERVES THE STORY

<input type="checkbox"/>	<b>Word Count: 400–700 Words</b>	Long enough to build emotional connection; short enough to be read in one sitting without scrolling fatigue.
<input type="checkbox"/>	<b>Three-Beat Arc</b>	Opening scene → Donor's journey & gift → Impact reaching into the future. Don't skip the middle — that's where trust is built.
<input type="checkbox"/>	<b>Short Paragraphs</b>	No paragraph longer than 4 sentences. White space invites reading. Dense paragraphs signal effort and create resistance.
<input type="checkbox"/>	<b>Active Voice Throughout</b>	Replace 'A gift was made by...' with 'Margaret gave...' Active voice creates momentum and honors the donor as agent, not subject.
<input type="checkbox"/>	<b>Headline Does Heavy Lifting</b>	The headline should promise an emotional payoff: 'A Gift for Birds — and the People Who Love Them.' Not: 'Legacy Donor Profile #7.'

<input type="checkbox"/>	<b>Photo Caption Earns Its Place</b>	If a donor photo is used, the caption should add information not in the body copy — not just repeat the donor's name.
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## 8 THE CALL TO ACTION — AN INVITATION, NOT A PITCH

<input type="checkbox"/>	<b>CTA Is Soft &amp; Conversational</b>	Avoid 'Donate Now' urgency language. Use: 'If you've ever wondered how to make your love for this landscape last forever, we'd love to talk.'
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<input type="checkbox"/>	<b>No-Obligation Language</b>	Explicitly state: 'There is no obligation.' Research confirms this phrase dramatically increases response rates in legacy contexts.
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<input type="checkbox"/>	<b>Named Human Contact</b>	Give a real name and title, not a generic 'planned giving office.' Donors call people, not departments.
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<input type="checkbox"/>	<b>Phone Number Included</b>	Legacy donors skew older and prefer phone. Always include a direct number alongside email and website.
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<input type="checkbox"/>	<b>Website URL Included</b>	Link to a landing page dedicated to legacy giving — not the general donation page. Reduce friction at every step.
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<input type="checkbox"/>	<b>CTA Echoes the Story's Emotion</b>	The last sentence of the CTA should circle back to the story's opening image or theme. Close the emotional loop.
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**GOLD STANDARD CTA:** *'To learn how a gift in your will can protect [specific habitat] for the next generation — with no obligation and no pressure — contact [Name] at [phone] or visit [URL]. We'd be honored to be part of your story.'*

## 9 FINAL REVIEW — READ IT THE WAY A DONOR WILL

<input type="checkbox"/>	<b>Read Aloud Test</b>	Read the story aloud. Every sentence that makes you stumble must be rewritten. Smooth reading signals emotional trust.
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<input type="checkbox"/>	<b>'So What?' Test</b>	After each paragraph, ask: 'So what?' If you cannot answer, cut or condense. Every paragraph must earn its place.
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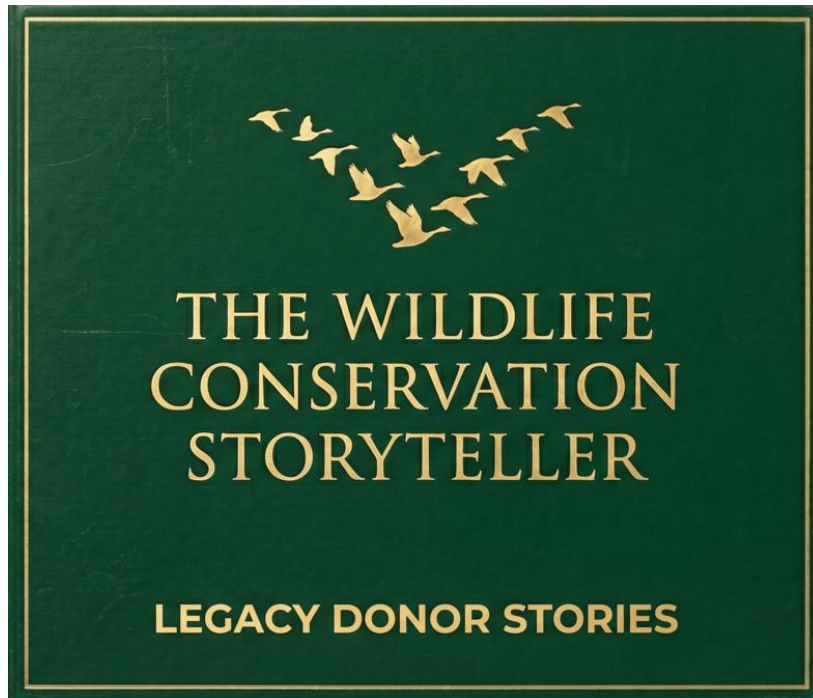
<input type="checkbox"/>	<b>Donor Approval Obtained</b>	Living donors must approve their quotes and portrayal before publication. This is ethical practice — and often produces even better quotes.
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<input type="checkbox"/>	<b>Legal/Compliance Review</b>	Ensure no language constitutes legal or financial advice. All estate planning should be directed to the reader's own attorney.
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<input type="checkbox"/>	<b>Stewardship Follow-Up Planned</b>	After publication, send the donor (or their family) a copy with a personal note. The story is also a stewardship gift.
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*"The donor's story is not the end of your story — it is the beginning of someone else's."*

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