I found a fruitful world, because my ancestors planted it for me. Likewise, I am planting for future generations.

- Taanit 23a

Why Legacy and How to Get Started

Arlene D. Schiff – November 2021
Harold Grinspoon Foundation
Who is in the room?
This evening’s agenda

• LIFE & LEGACY
• Why Legacy?
• Legacy Myths
• Legacy Plan Components
• Next Steps
Securing Jewish Legacies Across North America

Cohort 1
Charlotte, NC  
Memphis, TN  
Miami, FL  
New Haven, CT  
Orange County, CA  
Portland, OR  
Princeton, NJ

Cohort 2
Chicago, IL  
Greater MetroWest, NJ  
Greater Washington, DC  
Milwaukee, WI  
Omaha, NE  
Sacramento, CA  
Southern NJ

Cohort 3
Cincinnati, OH  
Delaware  
East Bay, CA  
Houston, TX  
Indianapolis, IN  
Phoenix, AZ  
South Palm Beach, FL  
Tampa, Orlando, Pinellas, FL

Cohort 4
Central PA  
Charleston, SC  
Heart of New Jersey, NJ  
Minneapolis/St. Paul, MN  
Richmond, VA  
Seattle, WA

Cohort 5
Central MA  
Durham-Chapel Hill, NC  
Lehigh Valley, PA  
Louisville, KY  
Nashville and Middle TN  
Palm Beach, FL  
Sarasota-Manatee, FL  
Tidewater, VA

Cohort 6
Atlanta, GA  
Atlantic & Cape May, NJ  
Greater Denver, CO  
Dayton, OH  
Nevada  
New Mexico  
Northeastern NY  
Pittsburgh, PA  
Rochester, NY

Cohort 7
Baltimore, MD  
Broward County, FL  
Calgary, AB Canada  
Montreal, QC Canada  
Rockland County, NY  
San Antonio, TX

Cohort 8
Ann Arbor, MI  
Columbus, OH  
Ottawa, ON Canada  
Stamford, CT  
Toronto, ON Canada

Cohort 9
Buffalo, NY  
Cleveland, OH  
Hartford, CT

Small Feds 2015
Arkansas  
Augusta, GA  
Chattanooga, TN  
Fort Worth, TX  
Peoria, IL  
Springfield, IL  
St. Joseph’s Valley, IN

Small Feds 2020
Halifax, Canada  
Flint, MI  
Northwest Indiana  
Orange County, NY  
Southern Maine  
Utah

Areivim Program
Philadelphia, PA  
San Francisco, CA  
St. Louis, MO  
Tucson, AZ

June 2021
LIFE & LEGACY® NATIONAL STATISTICS
JUNE 30, 2021

**Total Participants**
- 72 Participating Communities
- 741 Partnering Organizations
- $21M HGF’s Investment
  - 8.75 years

**Reporting Communities**
- 70 Communities
- 12 Hillels
- 731 Partnering Organizations
- 32,149 Legacy Commitments
- 61% Legally Formalized
- $1.24B Estimated Value
- $134M Already Realized

Based on information provided on the 6.30.21 report
## Proven Track Record

<table>
<thead>
<tr>
<th>Count</th>
<th>Type of Organization</th>
<th>LOI Actual</th>
<th>Est. Value</th>
<th>Realized $</th>
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<tbody>
<tr>
<td>34</td>
<td>Orthodox Synagogue</td>
<td>1,738</td>
<td>$48,311,036</td>
<td>$1,129,956</td>
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<td>Chabad Synagogue</td>
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<td>Conservative Synagogue</td>
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<td>$168,130,952</td>
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<td>Reform Synagogue</td>
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<td>$191,814,599</td>
<td>$24,181,085</td>
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<td>20</td>
<td>Synagogue, Other</td>
<td>793</td>
<td>$21,180,948</td>
<td>$920,798</td>
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</table>
Why Now?

Long-Term
Why Now?
Endowment Impact

Endowment 2% of Budget

- Membership Dues/Tuition: 23%
- Program and Other Fees: 2%
- Endowment: 70%
- Annual Fundraising: 5%

Endowment 20% of Budget

- Membership Dues/Tuition: 18%
- Program and Other Fees: 20%
- Endowment Income: 57%
- Annual Fundraising: 5%
Why Now?

- $59 trillion transfer of wealth
- Will miss an opportunity
- Maintain the vibrant Jewish community
- Secure the future for the next generation
Why Now?

Connect to Give Study

Legacy Giving
Motivators

• commitment
• values instilled
• give back
• make a difference
• part of something larger
• recognition
• united with others
• commemorate loved ones
• share their good fortune
• value what congregation offers to the community
Legacy Giving

Myth

Conversation focused on donor’s death

NO!

Giving donor opportunity to do something significant during their lifetime
Legacy Giving Myths

Legacy gifts are not cash endowments.

Legacy gifts fund endowments.

Legacy commitments are not a percentage of an estate.

Other ways...

Icons created Luis Prado from the Noun Project
Organizational Myths

Hurts an campaign
Gifts increase after legacy commitment

Need now
Yes, but you also need to plan for your future

No time
Already spending the time

Icons created by Callorine, Ismail Nural, Ifki rianto from the Noun Project
Organizational Myths

- No planned giving staff
  - There are people in your congregation who can help

- No financial advisors on team
  - Mission-based conversations

- Marketing = passive
  - General, targeted, conversations

Icons created by Ismael Ruiz, Delwar Hossaum, IconPal from the Noun Project
Legacy Prospects

Myths

Target over 65

Donors of any age

Wealthy best prospects

Most loyal best prospects

Leave children

Demonstrate commitment to your congregation

Icons created by Adrian Coquet and David from the Noun Project
Why Plan?
• **Legacy Statement**

• Management Strategy

• Target Audiences & Prospects

• Marketing Plan

• Stewardship Plan

• Goals

• Implementation Checklist
Legacy Case Statement

- One-page leave-behind
- Common language
- Marketing materials
Impact

Vision

Positive, forward thinking, confident

Clear, concise

THE BEST WAY TO PREDICT THE FUTURE IS TO HELP CREATE IT.
Legacy Case Statement

Why

What
Legacy Case Statement

✓ Role you play
✓ Core values
✓ Impact
✓ Who your legacy donors are
✓ Call to Action!
Since our founding in 1843, Congregation Beth Israel has been a welcoming, caring Reform Jewish community that helps individuals explore their spiritual life, grow, and engage in our world in a supportive environment. A community where members are empowered to be each other’s angels.

(Role congregation plays/Impact on the community)

We connect deeply with Jewish tradition by engaging in worship, celebrating holidays and lifecycle events, pursuing education at all stages of life, and building a holy caring community. Our Jewish values inform how we live outside the walls of our congregation; we are committed to making the world a more just place.

(Impact)
Our members, with diverse backgrounds, travel on many different paths and are at various points in their Jewish journeys and life cycle. This diversity creates a richly layered foundation for congregational life. We provide opportunities to experience and express Judaism in the ways most meaningful to each individual – prayer (avodah), fellowship (kehilla kedosha), acts of social justice (tikkun olam) and loving kindness (gemilut chasadim). We create connectivity among our members that results in lasting relationships.

(Core values/Impact)

Our legacy donors are congregants just like you, who are committed to embracing and providing a home for all, who want to build a community whose members love God, do justice, love mercy, walk humbly and love thy neighbor. Please join us!

(Legacy donors/Call to action)
Discussion

What are the **CORE VALUES** of your synagogue?

What **IMPACT** do you have on your congregants?

Address the *Why*, not the *What*
Legacy Plan Components

- Legacy Statement
- **Management Strategy**
- Target Audiences & Prospects
- Marketing Plan
- Stewardship Plan
- Goals
- Implementation Checklist
Management Strategy

Members of your legacy team & respective roles
Temple Management

**Greg Hirsch**, Past President, Legacy Team Leader –
- Inform the President and the board of the progress, monthly
- Solicit gifts and write thank you notes

**Ruben Arquilevich**, Executive Director –
- Solicit gifts and write thank you notes
- Responsible for relationship building and stewardship of donors

**Tracey Klapow**, Development Director –
- Responsible for the plan, quarterly reports, gift tracking and acknowledgement
- She will also report to the other members of the Legacy Team.
- Responsible for stewardship and relationship building

**Frank Ponder**, Board Member –
- Solicit gifts and write thank you notes

**Nancy Pechner**, Volunteer –
- Responsible for marketing
- Solicit gifts and write thank you notes
Legacy Plan
Components

• Legacy Statement
• Management Strategy
• Target Audiences & Prospects
• Marketing Plan
• Stewardship Plan
• Goals
• Implementation Checklist
Target Audiences & Prospects
Target Audiences & Prospects

- Individuals/families with connections to your organization
- Individuals/families with certain giving patterns & history
Target Audiences & Prospects

- Individuals/families with personal characteristics favoring legacy gifts

- Those who have used your services or been helped by your organization
What congregational groups could you envision reaching out to?
Legacy Plan
Components

- Legacy Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing Plan
- Stewardship Plan
- Goals
- Implementation Checklist
Develop Your Marketing Plan
Marketing
What Marketing Tools Will You Utilize?

BUZZ-METER

- WOW!!!
- HOT TOPIC
- PEOPLE TALKING
- HUH?
Use the Tagline

Be remembered forever by (Congregation name) with a gift in your will, trust, retirement account, or life insurance policy

Stationery, envelopes, email signature with link, newsletters, email blasts, front page of website….EVERYWHERE
Sample Marketing

Temple Marketing

**Newsletter** - Monthly
- Quarterly: article on giving vehicles, Listing, testimonial
- Monthly ad

**Facility** –
- Banner in the lobby
- Brochures and tent cards out on tables
- Content in membership material

**Events** - consider for every event and meeting planned –
- Banner in the room
- Group presentation
- Include tagline in program and/or Shabbat program

**Snail Mail** - consider for anything that gets mailed –
- Include statement stuffer or flyer
- Integrate legacy ask

**Electronic** –
- Tagline on emails
- Quarterly email with ask
- Content on Facebook and Website
How can your organization weave Legacy into the way you already communicate with your donors/members to seamlessly integrate Legacy into your organization?

<table>
<thead>
<tr>
<th>Visuals in the Facility</th>
<th>Events / Meetings</th>
<th>Electronic</th>
<th>Mailings</th>
<th>Newsletter</th>
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</tr>
</tbody>
</table>

- **Poster**
  - Verbal
  - Materials
  - ad
  - listing
  - testimonials
  - brochure
  - annual Report
  - bookmark

- **Banner**

- **Tent Cards**

- **Brochure**
  - Display
  - E-mail
  - E-newsletter

- **Card**
  - Social Media
  - Brochure

- **Ad**
  - Listing
  - Testimonial

- **Story**
Legacy Plan Components

- Legacy Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing Plan
- Stewardship Plan
- Goals
- Implementation Checklist
Stewardship
Why Stewardship?
How will you steward your donors?

Thank you for all you do!
Stewardship

CARE
Personal Connection / Share Impact
- Thank you note
- Phone call
- Cards - Birthday, Holiday
- Anniversary of legacy commitment
- Personalized letter
- Gifts
- Videos
- Impact report

SHARE
Donor Listings and Testimonials
- Newsletter
- Website
- Poster, digital display
- Annual report or event program
- Annual meeting or other gatherings

HONOR
Recognition at gatherings
- Legacy Shabbat
- Annual meetings – light candles
- Gala or other special events
- Holiday programming

INVITE
Special gathering
- Reception before “community” gathering
- Shabbat Dinner
- Invitation to “experience” the impact your organization is having in the community

Donor
Stewardship

Will you...

- personal note
- phone call
- event
- Legacy society
- List society members
Sample Stewardship Plan

Care (personal touch) –
- Handwritten thank you note (sent within 48 hours)
- Thank you, phone call, (a week or 2 after note)
- TuBishvat card annually

Share – (listings and testimonials)
- Create a Legacy Society and list in e-newsletter
- Personal stories and testimonials of members posted on website, social media and published in e-newsletter

Invite – (event specifically for legacy donors)
- Wine and cheese before congregational event

Honor – (among your congregation)
- At annual meeting
- At another event
Legacy Plan Components

- Legacy Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing Plan
- Stewardship Plan
- Goals
- Implementation Checklist
Set Goals

1. Set Goal
2. Make Plan
3. Get to Work
4. Stick to It
5. Reach Goal
6. Happy Face
Set Goals

- One conversation per month
- First two years: 18 – 25 commitments
Legacy Plan Components

- Legacy Statement
- Management Strategy
- Target Audiences & Prospects
- Marketing Plan
- Stewardship Plan
- Goals

- Implementation Checklist
Implementation Checklist

My To-Do List

Date ✓ Item

☐

☐

☐

☐

☐

☐

☐

☐

☐
Legacy Giving
Integrated into your Philanthropic Culture
Don’t judge each day by the harvest you reap, but by the seeds you plant.
~ Robert Louis Stevenson