



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

- *Taanit 23a*

Sustaining Your Legacy Program

Arlene D. Schiff – November 2018
The Harold Grinspoon Foundation

Jcamp180™
From STRENGTH
to STRENGTH ★

**LIFE &
LEGACY**™
Assuring JEWISH TOMORROWS



LIFE & LEGACY is a **4 – year partnership program** of the Harold Grinspoon Foundation (HGF) that **assists communities** across North America, to **promote after-lifetime giving** to benefit local Jewish day schools, synagogues, social service organizations and other Jewish entities.

Building Jewish Legacies Across North America



- ★ **LIFE & LEGACY:** 57 Communities
- ★ **Areivim:** St Louis, Tucson, San Francisco, Philadelphia
- **Hillel:** 12 Affiliates

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
Counties, NJ
Greater Denver, CO
Dayton, OH
Nevada
New Mexico
Northeastern NY
Pittsburgh, PA
Rochester, NY

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

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

National Update

June 30, 2018

More than half a billion dollars in future gifts!



Based on information provided on the 6.30.2018 report

What do you think
needs to take place to
sustain your legacy
initiative
in perpetuity?



Steps to Sustainability

- **Integrate into board** activities
- **Stay motivated**
- **Continue conversations and formalization** of commitments
- **Marketing** in perpetuity
- **Stewardship** part of organizational calendar
- **Integrated into all fundraising** activities
- **Continue transition to a culture of philanthropy**



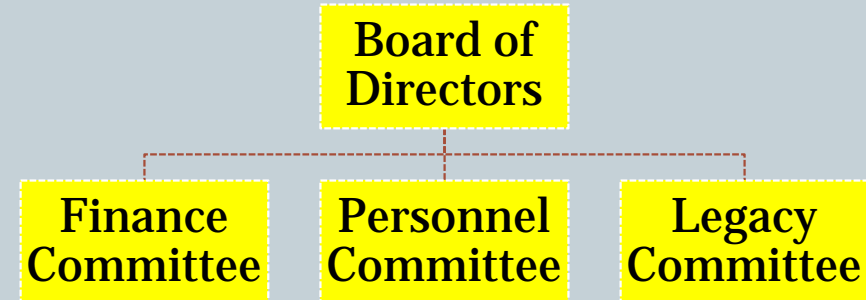


Integrate into Board Activities



Committee of the Board

- Legacy team evolves from a “special project” to a **standing committee of the board**
- Appropriate **succession plan** in place so new people come on as others transfer off
- Chair of committee **ideal role for past president**
- Legacy committee report on **board meeting agenda** at least quarterly
 - keep board informed as to new gifts secured, total number of commitments, estimated future value, gifts realized



Endowments, in the past a luxury, are **now an essential element of any nonprofits long-term financial stability strategy**

Financial advisers have suggested that any nonprofit organization that is not receiving **20% of its operating funds from an endowment by 2030** will be in fiscal crisis.

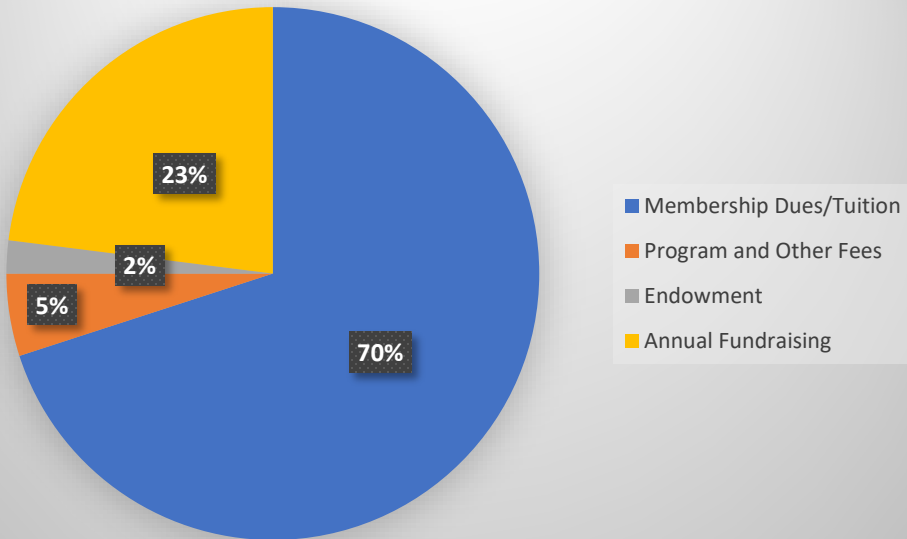
\$1 million operating budget need to generate **\$200,000 per year**

- **5%** spending policy = **\$4 M** endowment growing at 9%
- **3%** spending policy = **\$6.6 M** endowment growing at 7%

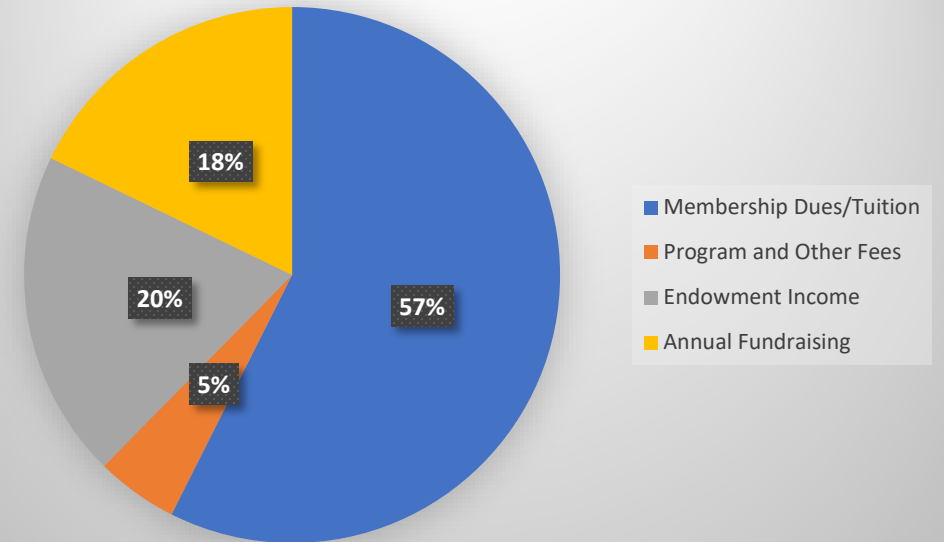
In order to reach this goal, you need to **take advantage of the transfer of wealth** by continuing to have legacy conversations and secure additional legacy commitments over the next 10 years.

Case for Endowments

Endowment 2% of Budget



Endowment 20% of Budget



Legacy Commitment Expectation

- Continue to **strive for 100%** board participation
- **Establish expectation** that every board member will make a legacy commitment sometime during his/her term
- When past or current board member legacy gifts are realized, **honor the individual at next board meeting**



What 2 things can you do to further integrate your legacy initiative into board activities?





Stay Motivated



What makes a successful team?



What 2 things can you do to improve your legacy committee experience?





Continue Conversations



Charitable dollars donated by bequests have **grown 30 percent** since 2013

Baby Boomers are currently the greatest economic force in giving. As they move into retirement, this generation is **expected to donate more than \$6 Trillion**

We are seeing a changing attitude toward generational wealth, such as people **choosing to give a higher proportion of their wealth away** instead of passing it along to the next generation

The future of philanthropy – Fidelity Charitable 2016



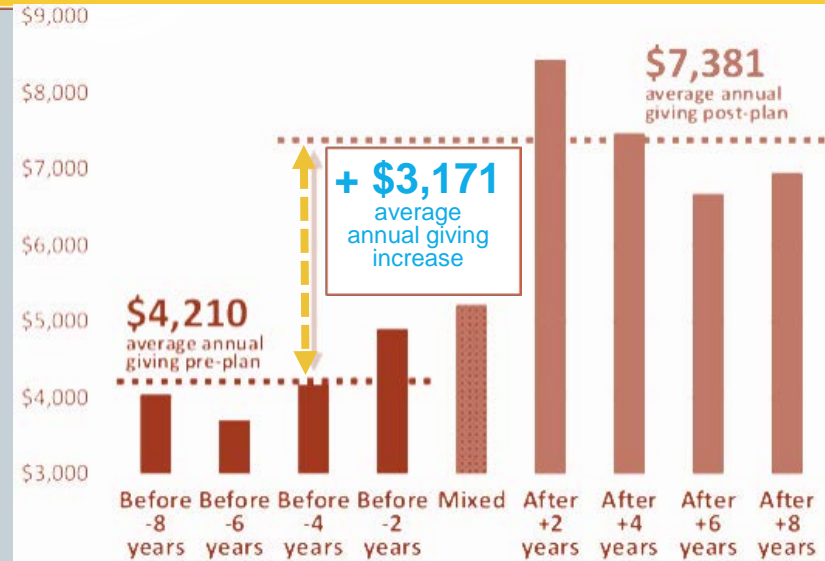
PROOF THAT PLANNED GIFTS increase annual giving revenue



Dr. Russell James

The foremost
researcher on
the subject

Dr. James' review of a 20+ year
national longitudinal study thanks
to the National Institute on Aging
(the study has been federally
funded since 1992)



Average annual gift PRIOR
to making a planned gift:

\$4,210

Average annual gift AFTER
making a planned gift:

\$7,381 ↑

GIVING INCREASED +75%

- **As annual donors become loyal donors** – consistently give for 5 or more years- make sure added to prospect list and legacy conversation takes place.
- Through marketing, stewardship and conversations you should **secure a few new legacy commitments each year**
- **#1 reason people don't give is because they weren't asked!**



Increase the height of your ladder



- Continue to have a **core group** of individuals focused on securing legacy commitments – **committee plus support from those who have made commitments**
- **Review your current prospect list** and establish a plan for having conversations
 - Each legacy committee member holds **one conversation per month**
 - **Committee meets quarterly** to review progress



DITCH THE PITCH A Guide to Successful FUNDRAISING



by STEVE YASTROW

Here are the six Ditch the Pitch Habits:

1

Think Input Before Output

In a conversation with a donor, let everything you say or do be informed by what you hear and observe.

2

Size Up the Scene

As you listen and observe, take stock of your potential donor's character and situation to understand what this particular donor's reasons for giving may be.

3

Create a Series of "Yeses"

A conversation only moves forward if both parties continually agree to let it move forward. Always find something to say "yes" to as you speak with your donor, avoiding the words "no" and "but."

4

Explore and Heighten

As you engage your potential donor, look for ways to take the conversation to a higher level. Explore to find what your donor really cares about and then heighten by discussing why these things are important.

5

Focus the Conversation on Your Donor

Resist the temptation to talk about your organization. Instead, have a conversation that is mostly about the donor.

6

Don't Rush the Story

Your donor won't be ready to hear your ideas as fast as you come up with them. Let the story emerge through your conversation, at a pace your donor can accept.

- **Open** warmly and connect with donor
- **Ask** for the current gift first (annual, endowment, capital, specialty)
- **Thank** them for their commitment
- **Move into legacy ask**
- **Thank again,** no matter the outcome



Formalization

Thank the donor for his/her legacy commitment through personal letters, calls and stewardship

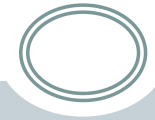
Ask him/her to formalize the commitment

Make it easy – legacy commitment form

Encourage gently

What 2 things can
you do to make sure
legacy conversations
continue?





Marketing



*Remember Camp ABC with a
gift in your will, trust,
retirement plan or life
insurance policy.*

Stationery, Envelopes, Email signature lines with link, Newsletters, Email blasts,
Pop-up on tables, Front page on website... EVERYWHERE

Get Creative



THEY DID IT...

WILL YOU?



TOGETHER, WE'RE MAKING A DIFFERENCE FOR THE FUTURE OF OUR JEWISH COMMUNITY!
More than 450 people have signed a Letter of Intent making a commitment to leave an after-lifetime gift to one or more of the Foundation's Create a Jewish Legacy partner organizations and you can do it too! Join us on November 6, 2016 at the 4th Annual Endowment Book of Life Community Celebration & Signing Event to honor and thank our Create a Jewish Legacy supporters. R.S.V.P today!

TO CREATE YOUR JEWISH LEGACY CONTACT:
Wendy Arenson, Executive Director
Jewish Community Foundation Orange County
1 Federation Way, Suite 210, Irvine, CA 92603
Ph. 949.425.3490 | wendy@jcfoc.org | www.jcfoc.org



The screenshot shows the CESJDS website. At the top is a dark blue navigation bar with the CESJDS logo and links for About, Admission, Academics, Student Life, Alumni, and Giving. Below the navigation is a banner image of children wearing colorful paper crowns. The main content area features a section titled 'BUILDING OUR FUTURE ENDOWMENT CAMPAIGN'. On the left is a vertical list of links: 'Make a Gift or Pledge Online', 'Maayan Annual Campaign', 'Parent Donors', 'Alumni Donors', 'Make a Gift in Honor or Memory', 'Grandparents', 'Day of Learning', 'Building Our Future Endowment Campaign and Planned Giving', 'Leadership', 'Gift Announcements', 'Letter of Intent', 'Named Endowments', 'Bonim Society Members', and 'Professional Advisors'. The main text describes the 50th Anniversary campaign and includes a testimonial from Talmud, Ta'anit 23B: 'As my forefathers planted these for me, so I too plant these for my children..'. A blue button labeled 'MAKE YOUR ENDOWMENT COMMITMENT' is highlighted with an orange arrow. Below the text are two yellow buttons: 'Thank you to our Endowment Donors' and 'Gift Announcements'. At the bottom are three dark blue buttons: 'Create a Jewish Legacy', 'Bequests', and 'Bonim Society', each with a right-pointing arrow.

Charles E Smith Jewish Day School, Rockville, MD

← Click button to make gift

← Listing of Donors

← Testimonials

← Clicks to learn more

 **Congregation Or Atid**
1 day ago

Your Life and Legacy team is excited to talk to you about Living Giving! Your gift - big or small - can make a difference. Please join us on Wednesday, the 14th, at 7:00 pm for some noshing at the home of Lisa and Leon Roday while we learn more about this amazing program. Please call the office to RSVP.

[Read Less](#)





jewishinseattle [Follow](#)

THIS HANUKKAH, LIGHT THE WAY FOR FUTURE GENERATIONS.



HOW WILL YOU ASSURE JEWISH TOMORROWS?

To create your Jewish legacy contact:
Rachel Rosenman, LIFE & LEGACY™ Manager & Development Officer

lynettevg likes this
45 MINUTES AGO

[Log in to like or comment.](#)

Facebook ←

Instagram ↑

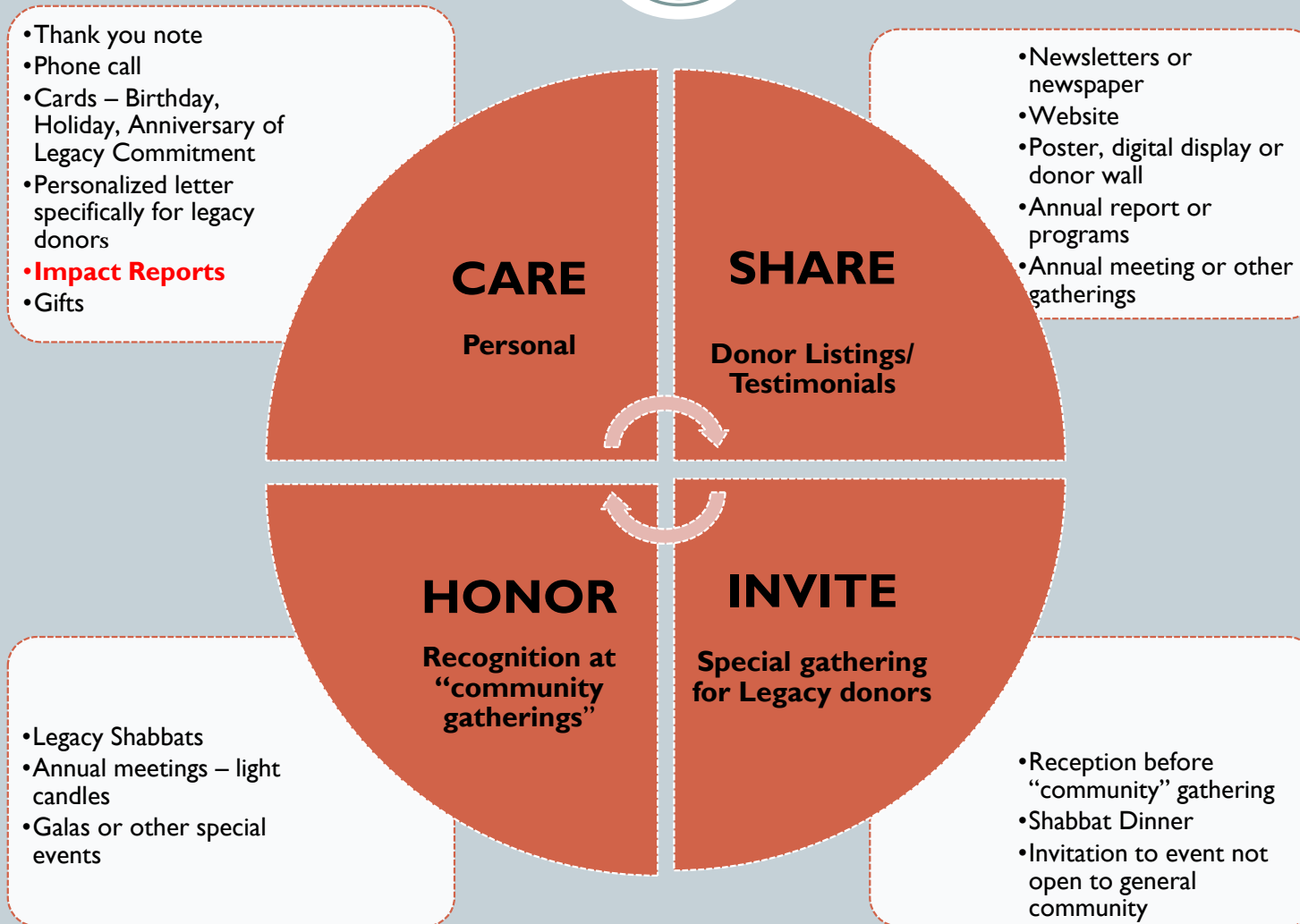
What 2 things can you do in the coming year to further market your legacy giving initiative?

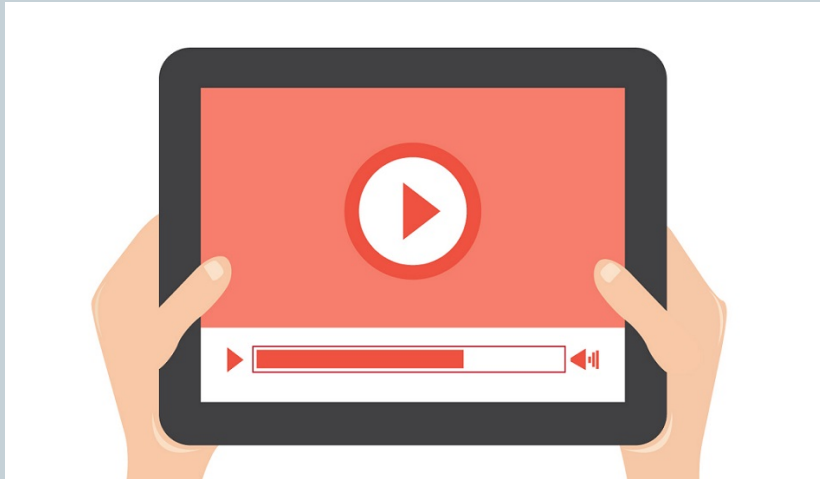




Stewardship integrated into annual calendar

Stewardship





*Video is the #1
communication tool in the
world – Lynne Wester, Donor
Relations Guru*

- <https://www.minimatters.com/thank-video-promote-donor-retention/>
- <https://www.youtube.com/watch?v=TNJggU-C2I4>
- <https://www.youtube.com/watch?v=54ZJ9LAjhF4>

We asked our students:
“What do you love most about RMBA?”

We can use the SMART Board in class and it makes learning fun.
Itzhar Shiri, 1st Grade

My Montessori class allows me to read, write and work together with my friends. But really just everything!
Atikay Salzman, 3rd Grade

In Middle School we can choose an Explo course that we are interested in creatively and I selected Art and Music.
Nava Yelke, 6th Grade

We are all friends with each other and teachers can give us extra attention and help.
Liraz Valentin, 10th Grade

Learning Math is fun so I can solve problems and correctly answer the questions.
Gilad Yarmush, 3rd Grade

My friends are in different grades which is special and we are able to have close bonds with our teachers.
Rabekah Grosberski, 9th Grade

The sense of community as everyone knows one another. Every year we make more friends and get to know each other even better.
Noah Melnikow, 10th Grade

I love the gym, playground, my uniform, my teachers and learning to write and spell.
Anaville Lernerstein, Kindergarten

During recess I can play outside on the big field and playground area on the monkey bars and find caterpillars with my friends.
Lency Jaroff, 1st Grade

The intense warmth and comforting feeling I get when I walk inside on any given day.
Maya Wadke, 11th Grade

2013 Highlighted Accomplishments

6 New Initiatives Launched

1. Day School Collaboration Network
2. Westchester Jewish Teen Learning Initiative
3. Coalition of Family Engagement Innovators
4. J-LINC
5. In-Site-Ful Journeys
6. Day School Parent Leadership Network



\$68M

in federal and state funds were directed to Jewish day schools to improve the education of **110,000** students.

moms

Findings from our focus groups with new moms taught us about the role Judaism plays in their relationships and the activities they choose for their children.

150

teens experienced new dynamic options for Jewish learning through 16 courses at 9 institutions as part of our Westchester Jewish Teen Learning Initiative (WJTLLI).



"I am so pleased that our teens have responded so favorably to WJTLLI's new avenues of learning. Teen enrollment has significantly increased this year!"



Rabbi Barry Kanner, Executive Director, WJTLLI Partner Site



1,000+

attended three Jewish Futures Conferences. Discussions included Legacy vs. Innovation – A False Dichotomy?; The Role of Bar/Bat Mitzvah in America Today; and Whose Torah Is It Anyway?

6 day school leadership teams learned to use new techniques, such as Design Thinking and Adaptive Leadership to develop innovative solutions to challenges in their day schools.

100 congregations adopted *Beyond the Classroom* models as an alternative to traditional Hebrew school. In 2013, five new models were added, bringing the total to 17.

4 early childhood centers have been matched with innovative educators through our J-LINC initiative, providing families and children ages five years and younger with new kinds of Jewish educational experiences.



Young Pioneers Awards

were presented to five innovative educators at our second annual awards ceremony.

FUNDING FROM THE FOUNDATION

2016

GENERAL OPERATING
\$134,063

- Funded Adath's clergy, staff, and maintenance team
- Provided unrestricted funds, reducing the increase of membership dues

EDUCATION
\$58,714

- Supported Gan Shelanu Preschool and Camp Mishpacha
- Provided Torah Study, Adult Education programs, and much more

SCHOLARSHIPS
\$44,035

- Sent kids to Talmud Torah, summer camp, and Israel
- Reduced barriers families face in sending kids to Gan Shelanu Preschool

CAPITAL IMPROVEMENTS
\$21,699

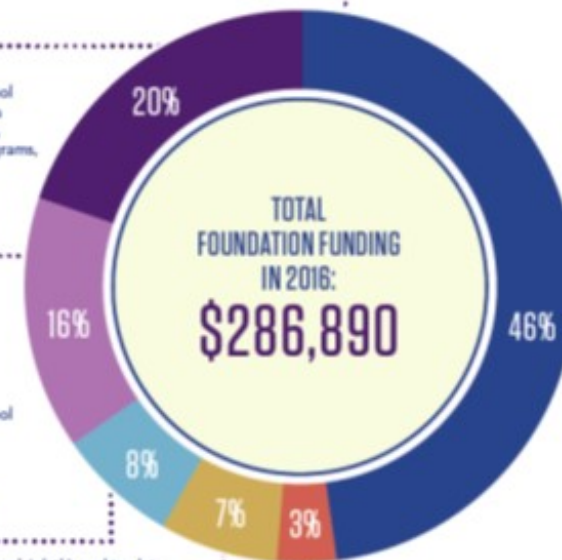
- Repaired and resurfaced Adath's parking lot

OUTREACH \$20,550

- Sponsored Yad Sima Tova, Adath's Outreach Caring Community
- Brought young adults together through Makom

MISCELLANEOUS \$7,829

- Underwrote Keren Or Creative Arts Contest for Teens
- Made Adath beautiful through art and landscaping





Tina Sheinbein
Executive Director



Ellen Friedman Sacks
Associate Executive Director

IMPACT.

We hear that word a lot. At JFL, we use the word often. But, what does it really mean? The Merriam-Webster Dictionary defines "impact" in two ways:

1. to fix firmly by or as if by packing or wedging
2. to have a direct effect or impact on

It is the second definition of the word that best describes what JFL does on a daily basis. We have a **DIRECT EFFECT** on our Jewish community. And, we do so, one interest-free loan at a time. The interest-free loans available through JFL, positively impact the individuals, families, organizations and small businesses that come to us for assistance. The impact of our loans is felt immediately when someone can restore their water service or avoid eviction because they left our office with a check in hand. The impact of our loans last indefinitely when an individual is able to pursue their educational dreams, a family can grow through IVF or adoption and a Jewish institution can make building improvements needed to better serve the local community.

The 2017-2018 fiscal year was Jewish Free Loan's largest and most impactful yet. We distributed \$637,963 in interest-free loans – a 14% increase over last year – and we are poised to continue that growth and momentum in the coming year. It is with great pride – and gratitude to JFL's friends and supporters – that we share with you the 2017-2018 Year In Review/Impact Report.

513
ACTIVE LOANS

\$1,473,127
INTEREST-FREE FUNDS
CURRENTLY ON LOAN

\$4.6M
INTEREST-FREE LOANS
MADE IN THE LAST
TWENTY YEARS



LOCAL LOANS. INTERNATIONAL IMPACT.

JFL Phoenix is proud to be the new home of the International Association of Jewish Free Loans (IAJFL) – a membership/networking group of more than 45 agencies serving communities around the globe.

DONATION DOLLARS IMPACTING COMMUNITY

116 INTEREST-FREE LOANS TOTALING \$637,963

GEOGRAPHIC IMPACT

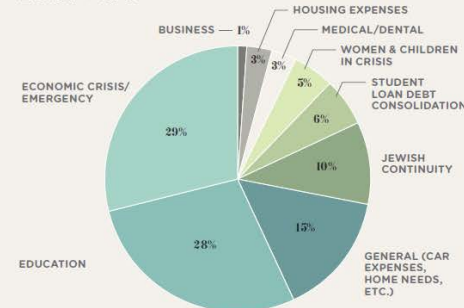
APACHE JUNCTION	PEORIA
CAVE CREEK	PHOENIX
CHANDLER	SCOTTSDALE
EL MIRAGE	SUN CITY
GILBERT	SURPRISE
MESA	TEMPE
PARADISE VALLEY	TUCSON



BORROWER DEMOGRAPHICS



LOAN TYPE



IMPACT BEYOND LOANS

1 NEW HEADQUARTERS FOR THE INTERNATIONAL ASSOCIATION OF JEWISH FREE LOANS

4 FINANCIAL LITERACY WORKSHOPS CONDUCTED IN 2017-2018

48 NAMED LOAN FUNDS PROVIDING INTEREST-FREE LOANS

94 LEGACY SOCIETY MEMBERS ENSURING THE FUTURE OF JFL THROUGH BEQUESTS

105 MISHPATIM SOCIETY MEMBERS

250 FRIENDS OF JFL ATTENDED THE 2018 ANNUAL MEETING

Greater Miami Jewish Federation

Federation
5 THINGS TO KNOW THIS WEEK
Five

FRIDAY, SEPTEMBER 7 | 27 ELUL



On behalf of the Officers, Board of Directors and Staff of the Greater Miami Jewish Federation, we extend our warmest wishes to you for a sweet New Year. May you and your loved ones be inscribed in the Book of Life and sealed for a year of health, happiness and peace. *L'Shanah Tovah Tikatevu!* Please take a moment to watch this [sweet video](#).



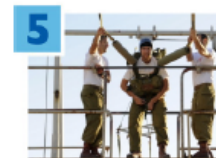
On Rosh Hashanah, we know it is important to take time to remember and reflect upon our own lives and those no longer with us. Join Federation's *Mishkan Miami*: The Jewish Connection for Spiritual Support for [Kever Avot](#) ("graves of our parents"), a traditional communal memorial service, on Sunday, September 16. Community rabbis, cantors and chaplains will be present at various local cemeteries at scheduled times during the day to help you honor the souls of those who have passed.



Federation's International Division recently brought together nearly 70 people for the Passion and Purpose Family Tour. The mini mission educated families about the agencies funded and programs made possible by donations to the Annual Federation Campaign. The group participated in Jewish Community Services' (JCS) Milk & Honey program by preparing and delivering *Rosh Hashanah* packages to elderly clients. They also explored the Miami Jewish Health campus and visited residents. Both JCS and Miami Jewish Health are Federation partner agencies.



Your donations to the Annual Federation Campaign helped 1,500 campers enjoy inspiring Jewish experiences at Camp Szarvas this summer in rural Hungary. Run by Federation's overseas partner, the American Jewish Joint Distribution Committee (JDC), Szarvas brings together Jewish kids from places where our rich heritage once flourished before the Holocaust or where there are only a handful of Jews. This unique camp is often the youngsters first encounter with Judaism. [Read more](#).



As the High Holidays approach, it's important that lone soldiers feel supported during their IDF service. Through WINGS, a program of our overseas partner, The Jewish Agency for Israel, Federation helps these young *olim* (immigrants) who have bravely left their homes without their families to make *aliyah* and take an active role in securing a strong Israel. Nearly 1,000 lone soldiers receive emotional and physical assistance, such as care packages, hospital visits, aid for visiting family and more.

JewishMiami.org

Donate Now

- 9/10 Rosh Hashanah
- 9/16 [Fourth Annual Mishkan Miami Kever Avot at Local Cemeteries](#)
- 9/19 Yom Kippur
- 9/24 Sukkot

[View the Community Calendar](#)

Shabbat Shalom!

Benjamin & Bernice Mazin VISUAL ARTS FUND

The Mazin Annual Art Exhibition was conceived and created by Bernice and Benjamin Mazin in partnership with Jewish Community Center's Visual Arts Committee. The event is funded by the Mazin Visual Arts Fund, Judy and Dennis Hummel and the Mazin family. It is a regional, juried art exhibition of 2-D and 3-D artwork, open to artists 18+ years old. Each year, the Mazin Art Exhibition fosters an appreciation of today's visual arts and reflects the breadth and artistic vision of local artists.



You too can create an endowment to preserve Jewish Louisville's programs and organizations that matter to you. Contact Jennifer Tuvlin at 502-238-2719 or jtuvlin@jewishlouisville.org to endow your Jewish values.



4.93 x 6.75 in

Drew Corson Youth Athletic SCHOLARSHIP FUND

Established in the memory of Drew Corson, this endowment fund focuses on youth athletics. In 2017, the Drew Corson Youth Athletic Scholarship Fund assisted Louisville in hosting more than 100 Jewish teens from the KIO BBYO region to participate in the Drew Corson Basketball Tournament.



You too can create an endowment to preserve Jewish Louisville's programs and organizations that matter to you. Contact Jennifer Tuvlin at 502-238-2719 or jtuvlin@jewishlouisville.org to endow your Jewish values.





CONGREGATION KENESETH ISRAEL
L'Dor Vador Society

Congregation Keneseth Israel is proud to announce that the following members listed here have made a commitment to leave a legacy gift to the KI Endowment Fund in their wills, trusts, retirement accounts or life insurance policies as participants in the KI L'Dor Vador Society campaign. We extend our deepest appreciation to those who have helped to insure the future of KI by leaving a legacy, which will continue beyond their lifetimes. We invite the rest of the Congregation to join them as the campaign continues. Please contact Vikki Dunn at 610-435-9074 or vdunn@kivv.org for more information.

- | | | |
|--------------------|-----------------|--------------------|
| ROSS BORN | DAVE EISKOWITZ | SUE KIRSHNER |
| WENDY BORN | LEN GLAZIER | LINDA MILLER |
| IAN CARLIS | RHODA GLAZIER | MIKE MILLER |
| PATTY CARLIS | SANDRA GOLDFARB | RABBI SET PHILLIPS |
| EDWIN DAVIS | KEN KIRSHNER | BOB ROCKMAKER |
| RABBI MELODY DAVIS | | AIMEE STEWART |



Oheb Shalom - A Home For Life!
A group of dedicated individuals have committed to guarantee that our beloved Oheb Shalom continues to live on for future generations.

**We've planned ahead.
Come join us!**

- Paula Blum
Michelle and Harold Bobrow
Jo Ann and David Boyko
Michelle Nagler and Daniel Cook
Amy Skopp Cooper and Rabbi Mark Cooper
Howard Cooperman
Marci and Tony Echeverria
Herbert Fisher
Bernie Friedland
Helen and Leonard Glaser
Linda Griffler
Barbara and Jerry Grunt
Renee z'l and Frank Katz
Meredith and Kevin Katz
Burt Liebman
Theodore z'l and Maxine Murnick
Jaqueline and Jacob Nover
Louise Weingrod and Robert Sandor
Amy Blumenau Schechner
Cynthia and Arthur Schechner
June and Michael Schechner
Norma Schechner
Paul Sheridan Schechner
Sue Schulman
Susan Waters and Stuart Schulman
Judith and Fred Simon
Alyson and Richard Slutzky
Charles Wantman
Linda Willner
Anonymous (4)

Ensure Jewish tomorrows at Oheb Shalom...

Please contact Linda Griffler, Executive Director, at execdir@ohebshalom.org or (973) 762-7067 to learn more.



Create Your Jewish Legacy

Thank you to the following legacy donors who have already submitted a letter of intent to CHDS, ensuring the continuity of Cincinnati Hebrew Day School's important mission:

- | | |
|-----------------------------|-------------------------------|
| Chaim and Sharon Barry | Yaacov and Chava Rabenstein |
| Alex and Galit Benzaquen | Zalmy and Shifra Reisman |
| Yehiel and Sarah Fishman | Yitzchak and Faigie Rosedale |
| Tzvi Fried | Eric and Cricket Schwartzberg |
| Jon Hoffheimer | Fishel and Rochel Singer |
| Dov and Abigail Katz | Eliot and Tamar Smith |
| Yuval and Michal Kernerman | Ben and Elisa Travis |
| Howard and Marlene Mayers | Bill and Elinor Ziv |
| Morton Family | Raffie and Sherri Zuroff |
| Yaakov and Yael Perelmutter | Anonymous |

Now is the time. CreateYourJewishLegacy.org
Contact Rabbi Ben Travis at 513-951-7777.



Strengthening Jewish Cincinnati



Why We Chose to Create a Jewish Legacy

By Dana Susson

It all started with our son playing in the JCC Maccabi Games in 1998. At those Games, we met some amazing families and made long lasting friends such as Irv and Nancy Chase. For five years, our children participated in the JCC Maccabi Games and we were welcomed into many wonderful Jewish communities across the country. Through those experiences, I became involved in the JCC Book Festival and the rest, as they say, is history.

Mark and I became one of the "founding families" at the Merage JCC, participated in the capital campaign, and got more involved in programs at the JCC. Ultimately, the JCC became the central focus of our Jewish identity. Now, both Mark and I serve on the Board of Directors. We participate in and support many programs here, including the JCC Maccabi Games & Artsfest Committees, Book Club, OC Jewish Arts Festival, our amazing JCC Cares Committee, and much more. Much of our social life involves the close friends we have made through the J. We have traveled to Cuba, Poland, and Israel with fellow members, and have attended many JCCA Biennials all over the country. We plan to be involved as much as possible for the rest of our lives. We want to "pay it forward" so that other families can benefit as we have, so it was an easy decision to include the JCC in our estate plans and create our own Jewish legacy.



Create a Jewish Legacy

The Merage JCC is proud to be one of the 11 organizations partnering with the Jewish Community Foundation of Orange County to ensure a strong Jewish future in our corner of California. Collectively we have secured 437 legacy commitments, worth an estimated \$11 million in future gifts to our local community.

Create a Jewish Legacy is a nationwide program initiated by the Harold Grinspoon Foundation to help Jewish communities develop their endowments to support the future operations of their agencies. Grinspoon is spreading the message that people of all ages and means can leave a lasting mark on the organizations they are passionate about and the communities they love by including a gift in their estate plans.

As one of the largest Jewish agencies in Orange County, Merage JCC will continue to play a leading role in our community, so it is important for all of us who are dedicated to its current success to think about how the JCC will thrive in decades to come. You can take a simple action today that will have a positive impact long on future generations by creating your own Jewish legacy.

We gratefully acknowledge the people who have chosen to leave a legacy gift to the Merage JCC:

Marlene and David Beach
Lynn and Dan Bernstein
Jeanne and Gideon Bernstein
Lily and Jim Bierig
Eleanor and Irving Burg z"l
Nancy and Irv Chase
Sandy Fairburg
Stuart Friedman
Julie Holdaway
Mara and Shawn Miller
Jada Robitaille
Julie Green-Rommel and Chris Rommel
Sue and Ralph Stern
Dana and Mark Susson
Shari and Michael Wagschal

We are proud to announce our newest Legacy Donors:
Doris and Marty Melnick
Mazel Ullman

What will your legacy be?

If you would like to learn more about how your family can build a strong Jewish future, please contact Debbie Melne, Director of Donor Relations and Stewardship, 949.435.3400 ext. 271, debbiem@jccoc.org.



Make a tribute

Celebrate a close friend or loved one by making a tribute in their name.

www.jccoc.org/donate/make-a-tribute/
or call Debbie Melne at 949.435.3400 ext. 271



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L'Dor V'Dor—Leaving a Jewish Legacy

A MESSAGE FROM LEGACY MEMBER COBY SONENSHINE



The Sonenshine Family (L-R): Alison, Max, Coby, and Solomon

For most of my life I have heard the phrase L'Dor V'Dor. By now we all know it means "from generation to generation," but it holds a special meaning for me as a second-generation member of Temple Bat Yehm.

My parents, Ygal and Sheila Sonenshine, joined TBY soon after its founding and have been instrumental in various Building and Capital Campaigns as well as WTBV over the years. I am particularly proud of their having underwritten the construction of The Sonenshine Family Sanctuary, which they named for my father who perished in the Holocaust.

Not surprisingly, most of my life-cycle milestones have involved TBY, including my Bar Mitzvah, my wedding to Alyson, our sons' Bris ceremonies, religious education and Bar Mitzvahs, and numerous Shabbat and High Holy Days services. I now serve as First Vice President of the Board of Trustees, and along the way Alyson and I co-chaired the TBY Gala in 2001, I chaired the Capital Campaign in 2004, Alyson chaired the Cantor's Concert in 2002, and Alyson was named the 2016 WTBV Woman of the Year for her involvement in the larger community.

Why do we commit our time and funds to TBY? Because TBY offers a constant reminder of what it means to lead a Jewish life in modern times. Precisely because we have such busy schedules, we find ourselves incredibly grateful for the literal sanctuary of the temple, the spiritual guidance of our clergy, the warmth of the congregation, the beauty of the music program, and the bounty of the facility itself. We have learned a great deal about Judaism from the Rabbi's sermons, the Distinguished Speaker Series, and Sunday morning Coffee Talk. And having made lifelong friends during our years in the preschool, we have had many occasions to celebrate and even cry together with our extended family here at Temple Bat Yehm.

By naming TBY in our Estate and thereby becoming members of the Life and Legacy Society, Alyson and I affirm our desire to see TBY thrive long into the future. After all, we want to ensure TBY continues in its current glorious form, should our sons, Solomon (17) and Max (14) wish to attend services, get married, name their babies, or celebrate other mitzvahs here... no pressure...yet...

You are invited...

1860 LEGACY SOCIETY SHABBAT
SATURDAY, APRIL 7, 2018

GUEST SPEAKER: Karen Secular, CJL Coordinator, GMW Federation

*"As my parents planted for me before I was born,
so I plant for those who will come after me."*
- Talmud



170 Scotland Road
South Orange

the life & legacy society

CREATE A JEWISH LEGACY



What 2 new things can you do in the coming year to steward your current legacy donors?







Integrate into all fundraising appeals



Integrate into all fundraising

- All fundraising appeals should include, at a minimum, **a place for donors to express interest in learning more about your legacy** program or legacy society
- **Integrate the legacy conversation into all** annual, capital or endowment campaign conversations.

OTHER	 Temple Beth Israel KOL NIDRE APPEAL	\$540
PLUS 10%	Temple Drive, Port Washington, NY 11050 Tel: 516-767-1708 www.tbiport.org	\$360
\$2500	In recognition of the important work that our congregation is doing to maintain and further Judaism, I hereby pledge the sum indicated in order to do my share in supporting our religious, educational and youth programs.	\$270
\$1800	Last Year's Pledge \$ _____	\$180
\$1500	To make a gift to the temple in your will, trust, retirement account or life insurance policy, fold "OTHER" and we will contact you after the holidays.	\$100
\$1000		\$ 72
\$ 720	Please fold appropriate flap over selected amount, place in envelope and leave with usher or in box by synagogue doors. Thank you.	\$ 36



2017 CJF ANNUAL CAMPAIGN

Your generous contribution is an investment in our local and global Jewish community. Please consider an increase in your gift. I pledge \$ _____

Name _____

Address _____ Email _____

City _____ State _____ Zip _____ Telephone # _____

METHOD OF PAYMENT: Enclosed is my check Please invoice

PLEASE CHARGE MY: Mastercard Visa AMEX

Card# _____ Exp. Date _____ Security Code _____ Billing Zip _____

Pledge payments are due December 31, 2017

Yes, I am interested in leaving a legacy gift to Charleston Jewish Federation to help ensure a vibrant Jewish future. Please contact me.

What is a Culture of Philanthropy?

Every single person in the organization is engaged in securing financial support and agrees that it's an important priority

Everyone conveys a positive attitude towards philanthropy by

- Being donor-centric
- Providing opportunities for engagement
- Building relationships
- Sharing excitement for the organization, the mission and the impact the funds will have

-Nanette Fridman, Fridman Strategies

Continue Transition to a Culture of Philanthropy

In A Fundraising Culture...	In A Culture of Philanthropy...
Philanthropy = grants by institutions or gifts from wealthy individuals.	Philanthropy = love of mankind.
Development staff is responsible for revenue generation.	Everyone in the organization shares some responsibility for revenue generation by serving as ambassadors and building relationships with potential donors and constituents.
It's all about the money.	It's all about the relationships.
Donors = money.	Donors = skills, talents, time and money.
Donors are contacted only when money is needed.	Donors are contacted regularly with invitations to participate in activities, progress updates, and information about how their contributions are helping.
Fundraising and engagement are siloed and have different contact lists.	There is one list for every person who's affiliated with the organization in some way (e.g., volunteering, donating, organizing, etc.).
Fundraising is seen as a one-off or add-on.	Fundraising is incorporated into and across every staff position and activity in the organization.
Culture is seen as "touchy feely."	Culture is the most important factor in determining an organization's effectiveness.
The board relegates fundraising to the development committee.	The board development committee directs the participation of the entire board in fundraising.
It's about acquiring donors.	It's about keeping donors.
Mission, program goals and operations are separate from revenue generation.	Mission, program goals and operations are aligned with revenue generation.
The focus is on short-term tactics like appeals and events.	The focus is on the longer-term strategy behind the tactics.
The organization functions with a scarcity mindset.	The organization functions with a mindset of abundance.
The organization's leaders make decisions based on what's available.	The organization's leaders make decision based on what the community needs and a shared vision of how to meet that need.
The community isn't engaged.	The community is intentionally engaged and participates as a partner with the organization.
Development staff/directors are relegated to secondary status.	Development staff/directors are part of the leadership team and equal partners with other senior staff; they participate in all planning, strategy, financial and organizational meetings.
Development goals aren't part of everyone's job description.	Development goals are part of everyone's job description.
Board and staff have sporadic contact.	Board and staff have regular opportunities to engage and interact.
The focus is on big gifts.	All gifts are important.
Donations come first.	Donations come after we engage people in our work.
We will win over every donor for our organization.	We will listen and refer donors to other organizations that align more closely with their aspirations.
Money is dirty.	Money is what we need to do our work.
There are rigid lines between organizations' departments, including development.	Job responsibilities and departments are more fluid; more collaboration to meet goals.





**2 new steps you
can take
NOW
for long-term
sustainability**





**“Don’t judge each day by the harvest you
reap but by the **SEEDS** you plant”
-- Robert Louis Stevenson**



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

- *Taanit 23a*

Sustaining Your Legacy Program

Arlene D. Schiff – November 2018
Harold Grinspoon Foundation