

BEYOND

T₁

H₄

A₁

N₁

K₅

S₁

Communications that Energize Your Donors

NICOLE
LAMBERG
& Associates

HGF Life & Legacy Gathering
June 4, 2018

A Tip on Thanking

Cornell University School of Hotel Administration
The Scholarly Commons

Center for Hospitality Research Tools

The Center for Hospitality Re

3-1-2011

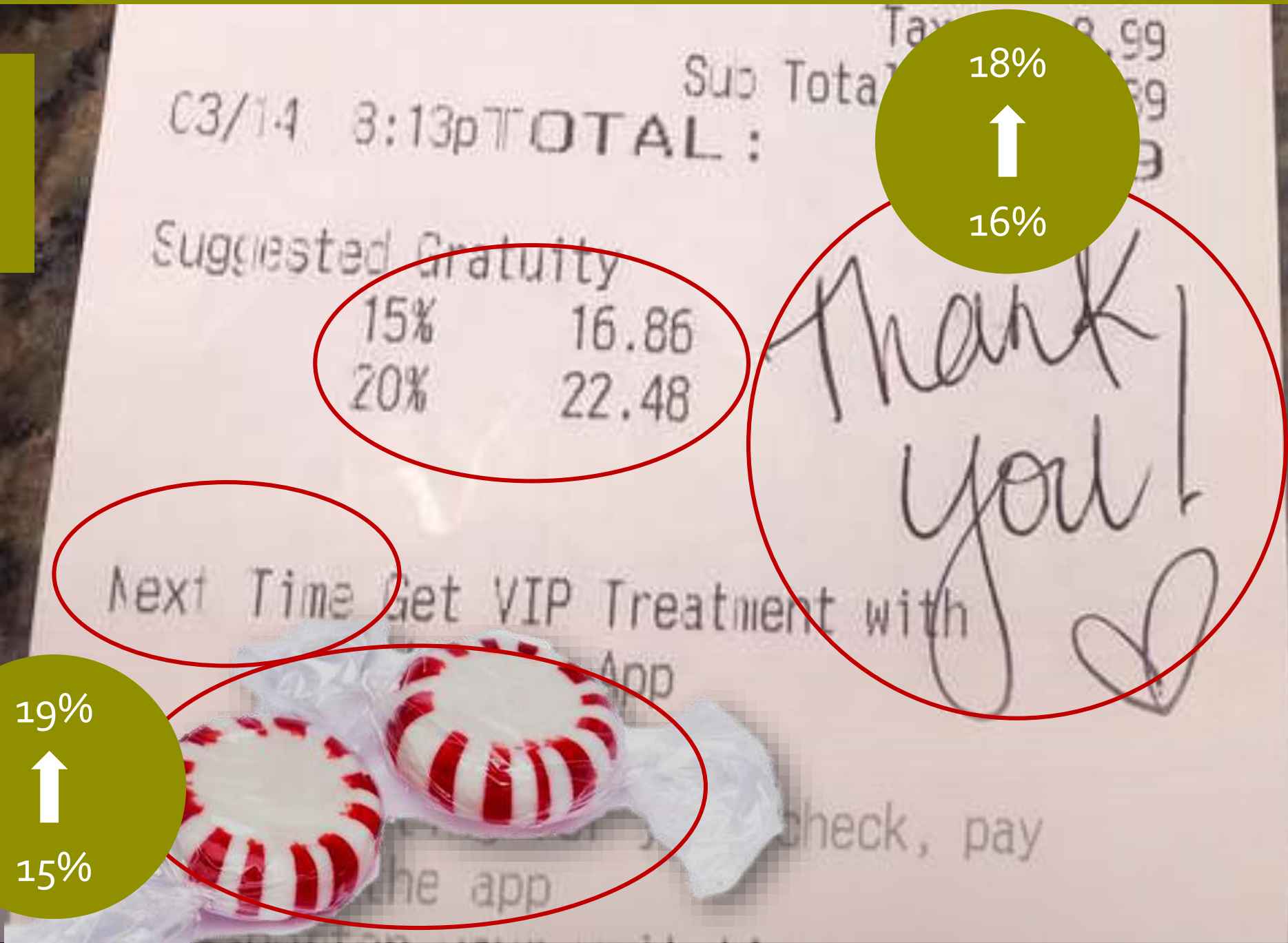
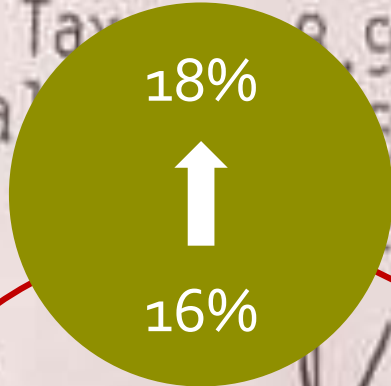
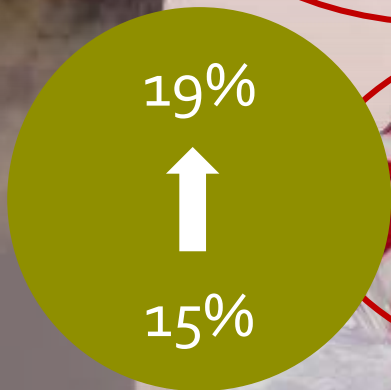
Mega Tips 2: Twenty Tested Techniques to Increase Your Tips

Michael Lynn Ph.D.
Cornell University, wml3@cornell.edu

A Tip on Thanking

Mega Tips 2:
Twenty Tested
Techniques to Increase
Your Tips
Michael Lynn Ph.D
School of Hotel
Administration
at Cornell University

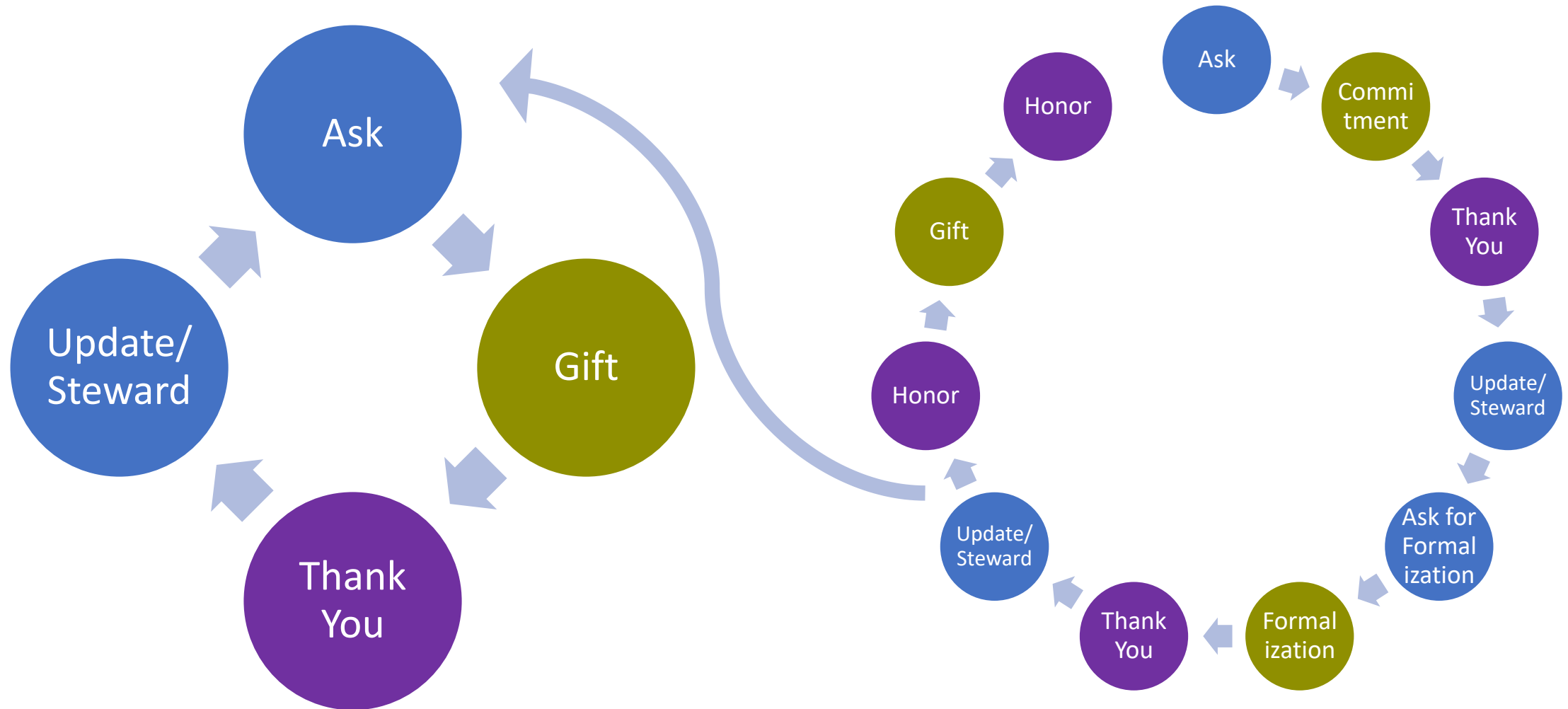
© Nicole Lamberg



Today's Conversation

- What donors are looking for in a thank you
- Systems for thanking (who/what/when)
- Thanking ideas
- Bonus thoughts
- Discussion!

Legacy Giving is a special scenario



Why Give?

Why Give Thanks?

People Give to Make an Impact



People don't give to support our mission.
They give to support THEIR mission.
We are the change
they want to see in their world.

It's about the **DONOR**, not about **US**

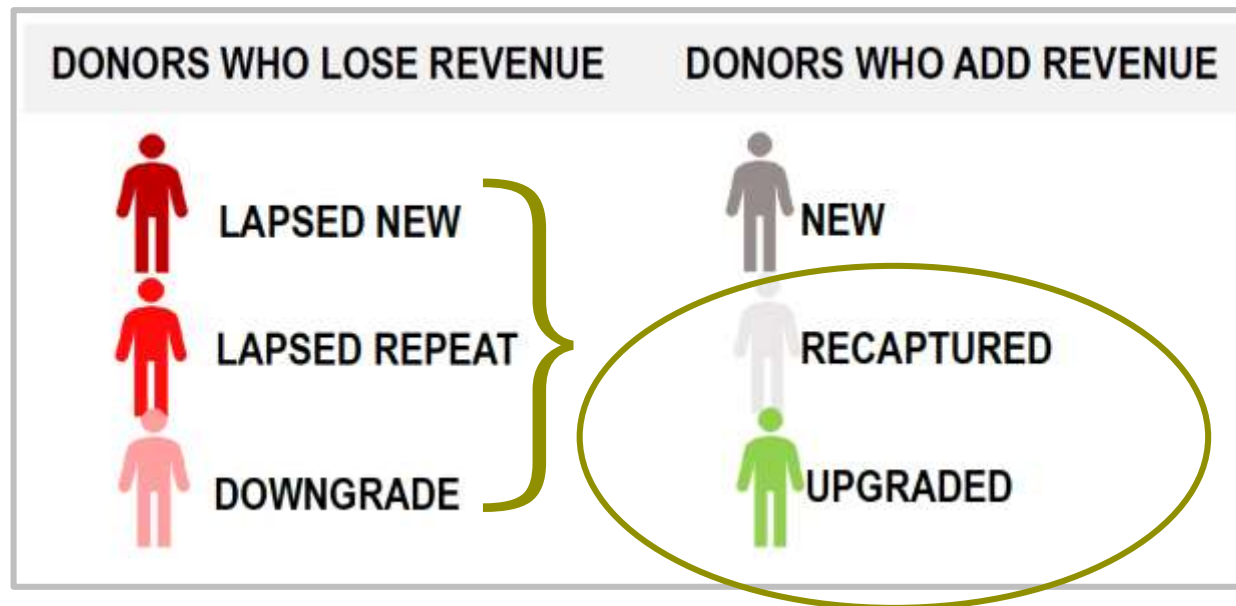
Share Pair Exercise

What does **great thanks** feel like?

How have you received thanks
in ways that made you feel
GREAT? MEH? UNHAPPY?

Practical Reasons to Prioritize Great Thanking

- National nonprofit donor retention* ~ 43%.
- It costs less to increase a donation than to secure a new one.
- Existing donors are more likely than new ones to convert to bigger gifts.



* 2017 Fundraising Effectiveness Project report by the Association of Fundraising Professionals (AFP) and the Center on Nonprofits and Philanthropy at Urban Institute.
<http://afpfe.org/wp-content/uploads/2017/04/FEP2017Report4212017.pdf>

Practical Reasons to Prioritize Great Thanking in Legacy Giving

- Move from Commitment to Formalization
- Make sure Formalized supporters don't change their minds
- Justify additional annual asks
- Model experience to attract prospective Legacy donors

A 15 YEAR STUDY OF RECORDS AT A LARGE, NATIONAL NONPROFIT WITH A MAILING PROGRAM OF **1 MILLION+** CONCLUDED THAT:

- 1** Donors who received a letter directly asking them for a bequest were **17 times more likely to give a bequest than donors who were not asked.**
- 2** Donors who were asked and thanked **gave twice as much as those who were not thanked.**
- 3** Those who were cultivated (notes, letters, visits, etc.) after the thank-you **gave 3 to 4 times as much.**
- 4** **Fewer than 1 donor in 14 had informed the charity that they had named them as a beneficiary in their will.**



DameGreene, S. – How to Develop a Successful Bequest Program: A Simple, Easy-to-Follow Plan for Starting, Increasing and Collecting Bequests At Your Nonprofit, *The Journal of Gift Planning*, 7(2), 17-62.

<https://www.slideshare.net/MarketSmart/26-really-interesting-planned-giving-marketing-stats>

What's Great Thanking?

Insert Name and Address
Dear ("*Insert Donee's Name*")
Thank you for your donation of
Organizations Name on
limited to, edu
organizat
goal

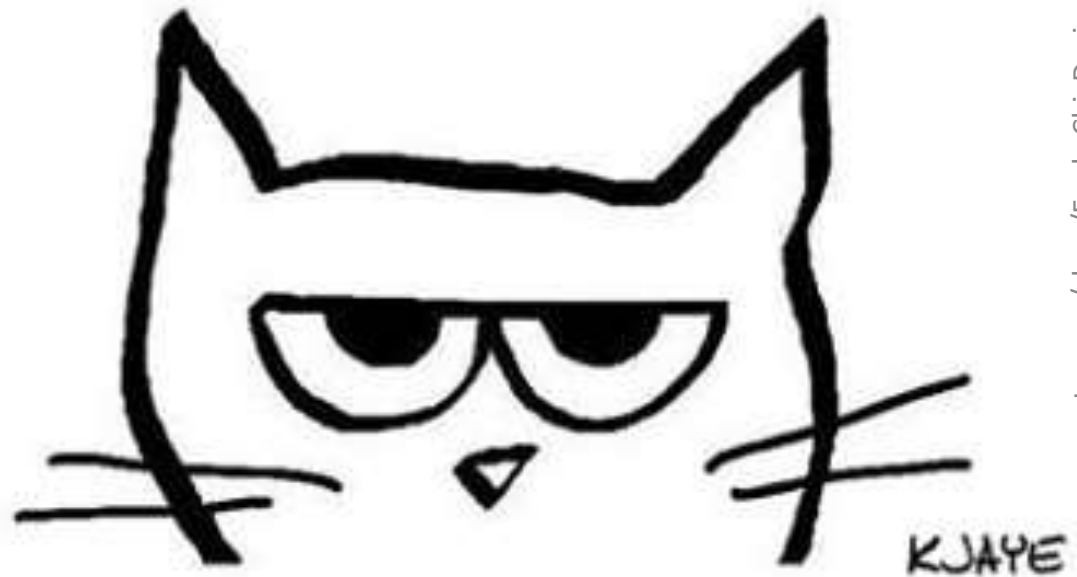
What they hear

blah blah GINGER blah
blah blah blah blah
blah blah GINGER blah
blah blah blah blah...



What they feel

Here you go.
I thanked you.
We're done now.



Donor-Centric Legacy Thanking Helps People...

- Feel appreciated
- Feel pride
- Know they are making an impact
- Feel committed to something bigger
- Increase their investment in your success
- Inspire others to give

Donor-Centric Thanking Can Help Secure...

- Bigger gifts!
- Additional annual gifts!
- Word of Mouth to influence other donors!

Systems for Great Thanking

- Who?
- When?
- What?

YOU can do this!
Ready?



What is "Ready"?

- Schedule > Habits
- People > Culture
- Tools > Ways to Thank

Timing is everything!



Inventory Exercise

Compare notes:

How do you say thanks to Legacy donors right now?
Which kinds of thanks do your Legacy donors love?

Establish Habits

Sample Donor Stewardship Plan: Lakeland Animal Shelter

Sample Stewardship Plan

PURSUANT.

The image displays two overlapping spreadsheets. The top spreadsheet, titled "Sample Donor Stewardship Plan: Lakeland Animal Shelter", lists various tasks such as "Thank-you phone call", "Hand-written thank-you note", and "Send video update of impact". It includes columns for "Who is Responsible?", "When?", and a grid for "1st time donor", "2nd Gift", and "3+ Gifts". The bottom spreadsheet, titled "Sample Stewardship Plan" and "PURSUANT.", lists tasks like "Set up", "Give gift", "Send Board Chair info, card", and "Provide phone number". It includes columns for gift amounts (\$1-\$499, \$500-\$999, \$1,000-\$2,499, \$2,500+) and an "ACTION" column. Red circles highlight the "1st time donor" and "2nd Gift" columns in the top spreadsheet, and the "ACTION" column in the bottom spreadsheet.

Grateful Client
Community Leader

Known Donor

Former Staff
or Board

First-Time

Personalize

Do they care who I am?

Do they understand why I am giving?

Parent

Grandparent

Business Leader

Volunteer

LEGACY

TWO-MINUTE SURVEY

We wish to recognize your gift intentions and give you the thanks you deserve. Please help us stay up to date by completing this quick survey for our Legacy Society records. The information you provide will help ensure that when **Seattle University** receives your estate gift, it will be used according to your wishes. We understand that life events may change your circumstances and this gift commitment can be modified at any time. The information you share on this survey will remain confidential.

CREATE YOUR LEGACY: Build their future

NAME _____ PHONE NUMBER _____

ADDRESS _____ CITY _____

EMAIL _____

- I/We qualify for **new** membership in Seattle University's Legacy Society.
- I am/We are **reconfirming** continued membership in Seattle University's Legacy Society.
- I am/we are interested in learning more about how I/we can help secure the future planned gift. Please contact me/us.

TYPE OF ESTATE GIFT Check all that apply	ESTIMATED GIFT VALUE	Is this gift specific?
<input type="checkbox"/> Bequest in my/our will or trust		
<input type="checkbox"/> Beneficiary of my retirement account: IRA, 401(k) or 403(b)		
<input type="checkbox"/> Beneficiary of a life insurance policy		
<input type="checkbox"/> Charitable Remainder Trust		
<input type="checkbox"/> Charitable Gift Annuity		
<input type="checkbox"/> Other		

AS A MEMBER OF SEATTLE UNIVERSITY'S LEGACY SOCIETY:

- I/We give permission for my/our name to be included in the Legacy Honor Roll listings.
- I/We prefer not to be included.

Please print my/our name(s) as follows: _____

Signature(s) _____

PLEASE TELL US YOUR SEATTLE UNIVERSITY STORY BY ANSWERING THE QUESTIONS ON THE BACK.

Ask donors why!

Then use what you learn to communicate more personally

SEATTLE UNIVERSITY

THANK YOU for your important commitment to Seattle University's future. If you wish, please share some of the following information.

1. What is your favorite Seattle University memory?

2. What impact has your Seattle University education had on you or your family?

3. Why did you decide to include Seattle University in your estate plans?

Segmenting Thanks

Annual Giving

Small	Repeat
Medium	New
Large	

Legacy Giving

Pre-Commitment	Individual
Pre-Formalization	Group
Post-Formalization	Prospective

Sample Legacy Stewardship Plan

PURPOSE of appreciation	Why? So that...	What? Examples:	How often? At least one of these tools...	PRE-Commitment	PRE-Formalization	POST-Formalization
Personal Relationship	INDIVIDUAL The donor feels personally known and appreciated	<ul style="list-style-type: none"> • Thank You note, preferably handwritten • Phone call • Holiday/birthday cards or emails • Gifts (ie mishloach manot) • Gifts in honor of milestones • Invitations to coffee 1x/year • Invitations to community events all year 	2x/quarter	✓ ✓ ✓	✓ ✓ ✓ ✓	✓ ✓ ✓ ✓ ✓ ✓
Affirmation	INDIVIDUAL The donor continues to feel good about the commitment	<ul style="list-style-type: none"> • Impact Report • Impact stories from beneficiaries • Personal note from beneficiary 	1x/quarter	✓	✓ ✓	✓ ✓ ✓
Membership	GROUP ALL donors take pride in joining an effort bigger than themselves	<ul style="list-style-type: none"> • Annual Legacy Reception • Group shabbat dinner • Pre-party/VIP events before full-community gatherings • Special sticker/ribbon on event nametags 	1x/quarter	✓?	✓	✓ ✓ ✓ ✓
Community appreciation	GROUP ALL donors feel celebrated by the broader community	<ul style="list-style-type: none"> • Honors at community events, such as candle lighting • Website listing • Impact Report listing • Donor wall/display • Newsletter highlights • Newspaper items 	1x/quarter		✓	✓ ✓ ✓ ✓ ✓ ✓
Role modeling	PROSPECTIVE Prospective donors feel inspired to consider joining, too	<ul style="list-style-type: none"> • Spotlights in newsletter or a website donor profile • Solicitation of testimonial for future Legacy materials 	1x/year			✓ ✓
Who can help?		Person who made the ask • Senior Leadership • Board members • Development Staff • Peer-to-Peer Legacy donors				

The Very Minimum Thank You Plan



Handwritten
Thank You

MAX: 2 days

Personal/
Visceral



Confirmation
Letter

1 week

Acknowledge &
start next steps



Phone call

1 week

Appreciate &
strengthen next
steps



Story of
Impact

30 days

So many stories,
so many ways to
inspire & welcome



Invitation

30 days

Join the club!
Pride +
Peer inspiration

Confirmation Letters with Verve

Dear Jim,

You made my day! *Personal appreciation*

Gratitude & immediacy

<Person who made the ask> just told me about your generous intent to join <organization>'s Legacy Society. I can't tell you how much I appreciate your passion for our lifesaving work with Toledo's most vulnerable children, especially <name the particular cause/interest of the donor, if any>.

The need

Here at Better Tomorrow, our goal is to make sure that no child in our area ever goes to bed hungry. While we served over 150,000 hot meals to children ages 2-18 in 2014 the sad fact is that over 5,000 kids in our area still went to bed hungry most nights last year.

How the donor makes a difference

Your Legacy gift will go a long way to helping us end child hunger in Toledo and beyond. In fact, **with Legacy gifts like yours**, we have been able to provide **over XXXX hot meals** to undernourished children in 2015.

Connecting donor to impact

Thank you! You are making a real difference in the lives of the kids we serve. Thanks to you, we can be far more confident that every child will go to bed full, well-nourished, and better off than the night before.

Enclosed please find a handy checklist for formalizing your commitment. I'll check in with you in a few weeks to see if you have any questions, and you can always reach me at email> and <phone>.

Friendly how-to

Jim, thank you once again for your commitment. It means the world to us!

With gratitude,

Personal appreciation

Adapted from "Steal This Thank You Letter! A Sample Donor Thank You Letter for Your Non-Profit",
<http://www.thefundraisingauthority.com/individual-fundraising/sample-donor-thank-you-letter/>


Your SUPPORT makes a difference in the lives of children with diabetes!

Dear Rainier Lions,
Thank you so much for your donation to Camp Leo this past year! Thanks to clubs like yours, in 2014 we were able to provide the experience of a lifetime to over 250 children with

John,

11.15.13

Thank you and the Reynolds Veterans Association so much for your generous contribution to Gravatt's Christmas Retreat for Military Families. Your continued support allows us to provide a program that these families look forward to all year and offers them a time to relax, reconnect, and enjoy the holidays together.

Thank you

Meredith Cook

Gravatt is a sanctuary for the ministry of faith formation, hospitality, leadership development, and environmental stewardship.

Handwritten thanks

Dear Bill,

On behalf of the Walpole, P.T.G., thank you! for your very generous \$100 donation as a Bronze Sponsor. Because of your gift Walpole children will be able to experience hands on field trips and enrichment activities - an invaluable part of their education. Thanks again for your support. We greatly appreciate it!

Stephanie Vickers Heddon
Walpole Parent Teacher Group



Make all your
thanks about what
matters to THEM

The tireless work of PIH's founders is uplifting to behold in this way, but what the film makes really clear to me is what it doesn't quite say out loud: There would be no story to tell if not for you, your generosity, and the work you make possible every day.

Ophelia, Paul, and Jim were blocked at nearly every turn by drug-resistant diseases, political bureaucracy, and a consensus among the medical establishment that you don't treat poor people with expensive medicines. Thirty years later, Partners In Health continues to confront the same kind of obstacles, but as *Bending the Arc* shows, we've learned how to be successful against the odds. That's an achievement that belongs to you and your dedicated support.

The Phone Call:

The best, cheapest, fastest,
most memorable donor experience of all



Research by Penelope Burk, advocated by Blackbaud:

**New donors who receive
a call within 48 hours
of making their first gift
will give approximately
40% more the next year.**

The Phone Call:

The perfect Board Member task

Hi, this is _____. I'm a _____ (volunteer board member, staff member) of _____ (organization).

I'm NOT calling to ask you for money. I'm just calling to welcome you to the Legacy Society and thank you for your commitment to _____ (the work)_____.

You will really make a difference to _____ and I wanted to tell you personally how much we appreciate it, and it means so much to have you as part of the (organization) family.



Legacy Letter

ISSUE 1 FALL 2017

Community: Greater Mercer, NJ
Organization: Jewish Community Foundation of Greater Mercer
Item: Community Newsletter
Contact: Amy Zacks
amy@foundationjewish.org

Special Thanks

We are incredibly grateful to the dedicated and visionary people who have made 519 LIFE & LEGACY Promises to date, to one or more of the partner organizations in our Greater Mercer area.

Thank you especially to the following committee members who made LEGACY possible through their generous support:

ceremony. Incentive grants were distributed, along with the following Broadway-themed legacy awards. It was One Singular Sensation!

Adath Israel Congregation	.....	The Sun Will Come Out Tomorrow
Beth El Synagogue	.....	Not While I'm Around
Congregation Beth Chaim	.....	Sunrise, Sunset
Congregation Tzoref Emek	.....	To Life! L'Chaim!
Greenwood House	.....	Someone to Watch Over Me
The Jewish Center, Princeton	.....	I'm Not Throwing Away My Shot
Jewish Community Foundation	.....	Who Lives? Who Dies? Who Tells Your Story?
Jewish Family & Children's Service	.....	The Circle of Life
Kehilat HaNahar	.....	Our Love is Here to Stay
Museum of American Jewish History	.....	Children Will Listen
Or Chadash	.....	What I Did For Love
Simon	.....	Defying Gravity
Station Heritage Center	.....	I Dreamed a Dream
Temple Beth-El	.....	You'll Never Walk Alone



Your Impact

Through our funds, the Foundation provides more than \$1 million annually in grants to hundreds of local, national and international organizations. **Social service nonprofits** in the Greater Mercer area, in particular, benefit from these grants. They provide a comprehensive range of programs that address numerous issues, including poverty, hunger and food insecurity, homelessness and affordable housing, domestic violence prevention, teen substance abuse, teen leadership training, senior assistance, and social and recreational activities for urban youth. We are grateful to the donors who allocate funding for these vital programs and services. Thank you!

Jewish Community Foundation of Greater Mercer
4 Princess Road, Suite 211, Lawrenceville, NJ 08148
Contact our Executive Director at 609-219-0555 or ajie@foundationjewish.org

Stories of impact & role models



COUNTING ON...

NANCY LINCOLN AND REDDI FORD

Long-time Brookline residents shaping their legacy.

"We put the Brookline Center at the top of the list for our giving, what we intend to leave, and what we want our kids to value in terms of future giving. Why? We've always been inspired by the Center. As established as it is, it's never stagnant. The Center is always looking forward, innovating. If there's a need to be met, the Center is at the forefront. It's vital to us that the Center remains a central resource for all of Brookline."



CONGREGATION AGUDATH ISRAEL

Invitations



Your planned
gift puts you in
good company
today.

Tomorrow, your endowed fund will be multiplied with the gifts from other caring individuals and families for the betterment of our community for generations to come.

Legacy giving is easy. It only takes a plan.



Legacy Society Events



Legacy Luncheon 2018

73 photos



Legacy Luncheon 2017

92 photos



Legacy Event Guggenheim 2016

11 photos



Legacy Luncheon 2014

102 photos



Legacy Luncheon 2012

68 photos



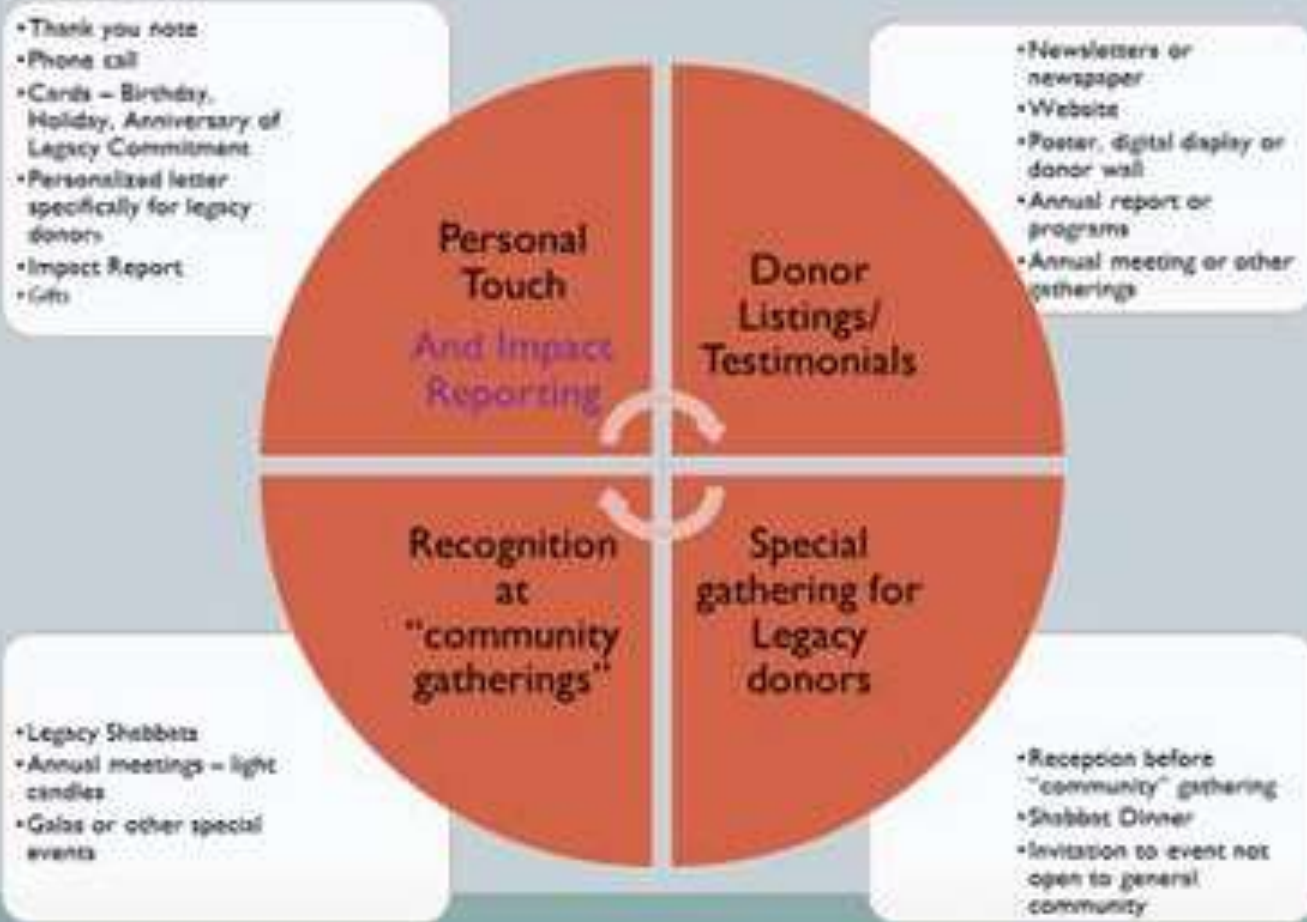
Legacy Luncheon 2010

50 photos



Invitations

Your planned gift puts you in good company today.



Strive for 6+ Thanking Touchpoints Each Year

Send:	Invite to:	Share a:	Meet:	Welcome:
Personal notes	Social event with the Director	Client letter	Leadership	Their stories
Email	Social event with Legacy Society	Peer testimonial	Board	Their expertise
Prompt formal letters	Tour of facility	Art/Music	Peers	Their perspective
Photos	Performance/event	Recipe	Experts	
Video	Shabbat dinner	Yearbook	Clients?	
Small gifts		Highlight		
Milestone updates		New commitment		
Newsletters				
Holiday greetings				
Impact Report				

Pick ones that work best for you, or add your own!

The Very Minimum Thank You Plan



Handwritten
Thank You

MAX: 2 days

Personal/
Visceral



Confirmation
Letter

1 week

Acknowledge &
start next steps



Phone call

1 week

Appreciate &
strengthen next
steps



Story of
Impact

30 days

So many stories,
so many ways to
inspire & welcome



Invitation

30 days

Join the club!
Pride +
Peer inspiration



Keeping in touch

'Yes, I would like to consider leaving a gift to Arthritis Research UK in my will.'

Making a will is a private matter and you do not, of course, have to tell us whether or not you have decided to leave a gift to Arthritis Research UK.

However, if you would like to tell us, it will help us prepare for the future and plan vital long-term funding for research. It would also allow us to thank you now, and to keep you

informed of progress in the areas of arthritis research that you care about most.

We know that most people who support Arthritis Research UK with a gift in their will have been touched personally by arthritis. If you would like to share your story/reason for supporting us in this way, we'd love to hear from you.

Please use the card in the pocket opposite to keep in touch. And thank you so much for your support.



Checklist for your solicitor

You might find it useful to take these details along with you when you visit your solicitor.

A. My assets (everything I own)

Your home	£
Other land or property	£
Cars or other vehicles	£
Home contents including furniture & fittings	£
Electrical goods	£
Jewellery	£
Money in bank & building society accounts	£
Shares or investments	£
Insurance or pension	£
National Savings or Premium Bonds	£
Money owed to me	£
Anything else of value	£
Total Assets (A)	£

B. My liabilities (everything I owe)

Mortgage (current outstanding balance)	£
Bank loans	£
Overdraft	£
Home purchase	£
Other	£
Tax	£
Any	£
Total	£

What's inside?

Your assets working out what you own.

Your inspiration has someone with arthritis inspired you?

Keep in touch how to find out more about what we do.

Arthritis Research UK

A gift in your will can help beat arthritis



"As an arthritis sufferer myself, I feel it is vital to continue my support so that you can help others in your invaluable way."

Carol Peters, Manchester.

www.arthritisresearchuk.org

Welcome well

Achievements IN Legacy

2012-2017



286
DONORS



556
LEGACY GIFTS



9
PARTNER
ORGANIZATIONS



\$11+ Million
IN FUTURE GIFTS

\$255,000 INCENTIVE GRANTS AWARDED BY
JEWISH FOUNDATION OF MEMPHIS TO PARTNER ORGANIZATIONS



JEWISH FOUNDATION OF MEMPHIS

PARTNERS, LEGACY TEAM LEADERS AND JEWISH FOUNDATION OF MEMPHIS (JFOM) INCENTIVE GRANTS



In 2012, the Jewish Foundation of Memphis launched a transformational initiative, **CREATE YOUR JEWISH LEGACY**. The initiative was designed to help secure the future of the Memphis Jewish community by strengthening the endowments of local Jewish organizations. The Jewish Foundation provided the tools, training and support to assist its partner organizations in asking donors for legacy gifts. These legacy gifts came in the form of bequests, retirement assets and other planned gifts.



Show current & prospective donors that they are part of something wonderful



THANK YOU TO OUR LEGACY SOCIETY MEMBERS

The Jewish Federation of San Diego County Legacy Society honors those individuals and families who have made a gift to the Federation through their wills and estate plans. Membership in our Legacy Society is a unique opportunity to enjoy the satisfaction of knowing you've created a Jewish Legacy. We honor the generous community members listed here who have made a real and lasting impact on our community.

Celeste z"l & Irving z"l Abel
Sybil z"l & B.J. Adelson
Martin Adler z"l
Alice Alperin z"l
Beth & Phillip Alpert
David Alpert
Joyce Axelrod

Susanna Flaster
Pauline Foster z"l
Helen Freedman z"l
Judith & Dr. William Friedel
Donald Friedlander
Elaine Galinson

Bernard Kunin z"l
Flora & Morris Kur
Mack Leblang z"l
Sally Leeds z"l
Harriett Levin z"l
Helen Levine z"l
Arthur Levinson



Go public online

Jane Scher
Mary Ann Scher
Gloria & Irving Schiffman



Whatever you cherish most about Jewish life in your community or around the globe— education, Jewish continuity, worship, caring for those in need or social justice— by leaving a legacy gift, you ensure that the things you value are sustained for future generations.

Why should you commit to LIFE & LEGACY?

In some way, your life is rooted in Jewish experiences connecting you to the Jewish community. You may support Jewish organizations locally and abroad, but are they included in your will or estate plan?

LIFE & LEGACY is a partnership of the Harold Grinspoon Foundation and the Jewish Federation and Foundation of Nashville and Middle Tennessee that promotes after-lifetime giving to benefit the ENTIRE Jewish community— synagogues, local Jewish agencies and organizations, the Nashville Holocaust Memorial and our day school.

By making your legacy commitment you can:

- Convey your commitment to the Jewish people.
- Express values instilled in you by your parents and grandparents.
- Assure that the institutions that mean so much to you continue to thrive for future generations.
- Perpetuate the Jewish traditions that you cherish.
- Preserve programs and organizations that support Jewish life in Nashville and around the world.

For more about LIFE & LEGACY, contact Naomi Limor Sedek, Assistant Executive Director at Naomi@Jewishnashville.org.

FEATURED: CHARTER MEMBERS OF BOOK OF LIFE

We would like to recognize and honor the generous donors** who have already made the decision to create a Jewish legacy with the Jewish Federation & Foundation through our Book of Life program. Thank you for ensuring that the community that means so much to you during your lifetime will thrive for future generations by planning a legacy gift.

Phyllis and Ben* Alper
Linda and Jay Amsel
Sandy* and Larry Averbuch
Judy Liff Barker
Sharon Bell
Dianne and Brian Berry
Julie and Frank Boehm
Nancy Brown and Andy May
Margie* and Ben* Cavalier
Renette and Abe* Corensiwet
Nathan Edward Davis
Babette* and Barney* Doyne
Elizabeth Ginsberg Dreifuss
Elaine and Steven Edelstein
Sylvia and Robert Elman
Donna and Jeffrey Eskind
Al Feldman*
Rita and Ned* Feldman
Royce and James Fishel
Daniella and Jack Fleischer
Lois* and Gilbert Fox

Eva* and Sam* Garfinkla
Jean* and Alven* Gertner
Harris Gilbert
Letty-Lou* and Joe* Gilbert, Jr
Lillian W. Gilbert*
Norman "Sandy" Ginsberg*
Mark Goldfarb
Dorothy* and Edward*Goldstein
Gretchen and Randall Goldstein
Selma* and Carl* Goldstein
Bernice and Joel Gordon
Rita Dee* and Harold* Hassenfeld
Heidi and John Hassenfeld
Reva and Eugene Heller
Risa Klein Herzog and Drew Herzog
D.H. Hirsberg*
Melanie and Douglas Hirt
Edward Katz*
Marion* and Peter* Katz
Arlene Kaufman

Leslie and Howard Kirshner
Rose* and Sam* Komisar
Elsie* and Joe* Kraft
Jack W. Kuhn, Sr.*
Ellen and Michael Levitt
Barbara Grossman Levy
Daniel Liff*
Jan Abby Liff
Jody Mattison and Jordan Asher
Rosemary May*
Cynthia* and Richard* Morin
Helen* and David* Morse
Horace Moskovitz*
Norma and M. William* Neaderthal
Madeline* and Eugene Pargh
Suzy and Stewart Perlman
Sylvia Lynne Rapoport
Louis Rosenfeld*
Suzanne and James Schulman

Floyd Shechter
Hilda B. Ratner*
Barbara and Larry Speller
Shirley and Stuart Speyer
Elise* and Berney* Steiner
Sadye* and David* Stillman
Peggy* and Martin* Tohrner
Leah Rose* and Bernard* Werthan
Libby and Morris Werthan
Barbara and Julian Zender, Jr.
Shirley and Martin* Zeitlin
Etta and Raymond Zimmerman
Fred Zimmerman
Mary* and Harry* Zimmerman

*Of Blessed Memory
**As of 4/21/17

Go public in print

Gather stories from beneficiaries



Dear Jewish Federation
Thank you for the scholarship
for camp it was so fun
I really enjoyed the days
were so nice and the
were nice to my camp
thing was Maccabiah I
hang out with other
Boys the reason I
want to go next year
hang out with all
Jewish friends thank
again for helping to
camp thank you
you thank you

THANK YOU

Thank you for donating
To our camps, I
have had so much
fun here, My favorite
activity is free
swim.

NAYDO

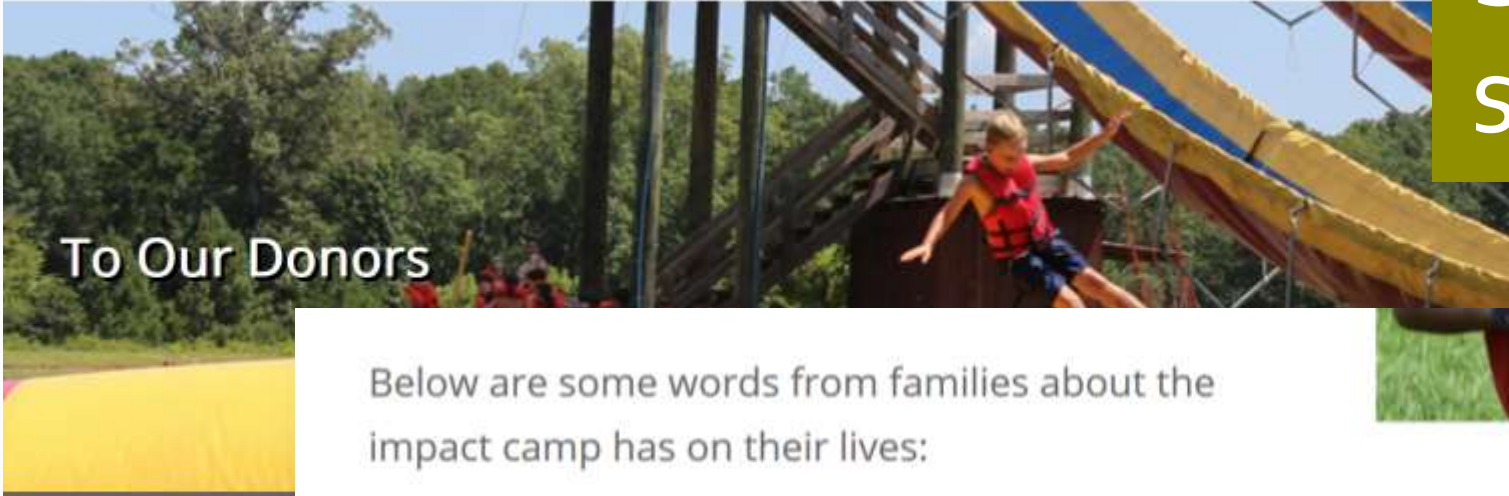
The North American YMCA Development Organization Inspires and Strengthens the Philanthropic Culture of the YMCA





Summer ▾ Year-Round ▾

Share beneficiary stories to donors



To Our Donors

Below are some words from families about the impact camp has on their lives:

[Home](#) > [Give to Jacobs](#)

On behalf of the your support! Yo a powerful, posit Our camps trans immersive exper new and vital fut community.

Below are some

We want to thank you and your staff for the wonderful experience our granddaughter had in Olim. She has not stopped talking about camp and can't wait to go back next year. She woke up one morning and said "I don't want to be here; can I go back to camp?"

- Grandparents of 1, First-Timer, Memphis, Tennessee



When my mother and I dropped off our camper, I was immediately impressed by the ruach, warmth, and professionalism of the staff, as well as their tremendous commitment to Jacobs.

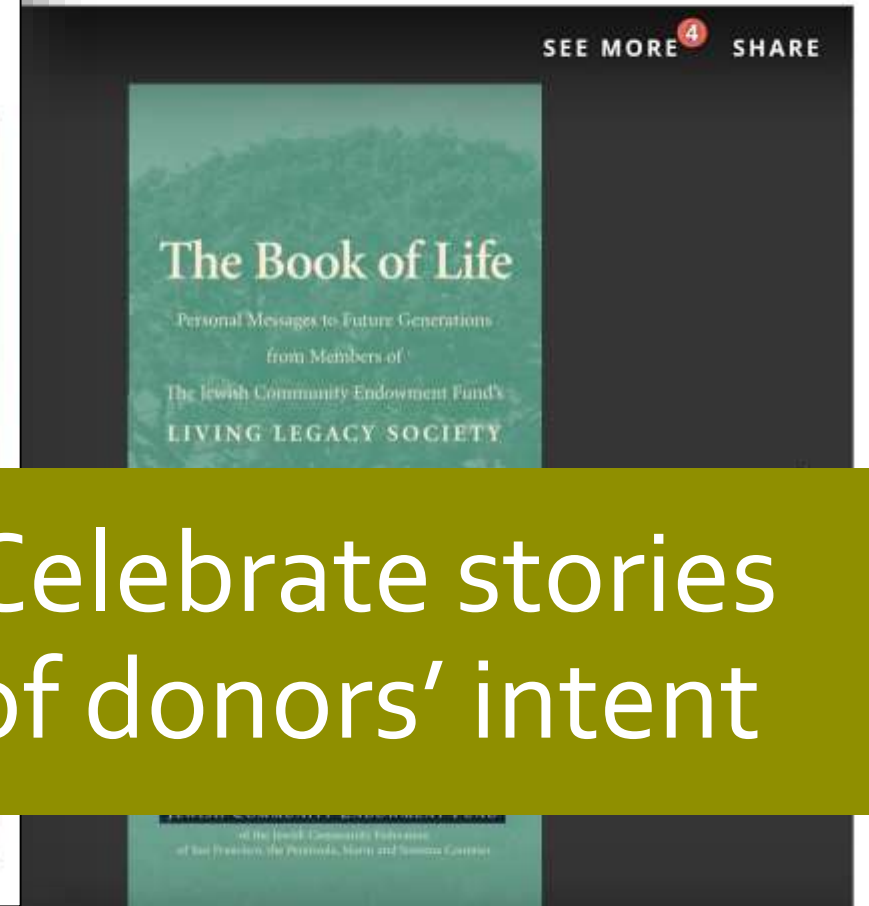
- Mother of 1, First-Timer, Memphis, Tennessee



The Book of Life is a unique treasury that recognizes members' foresight and generosity by documenting ideals and motivations for keeping our Jewish community vibrant and strong. Messages permanently record personal thoughts, stories and values that inspired Jewish connection and philanthropy, to be shared with future generations. The Book of Life, now in its second volume, is a magnificent work of art designed by renowned Bay Area artist Joseph Goldyne, and is prominently displayed in the Federation's building at 121 Steuart Street in San Francisco.

Multimedia Endowment Book of Life

Members of the Simon Family Legacy Society are leaving more than a financial legacy. They're leaving a personal legacy, too. As part of their membership in the Society, donors record their own personal statements on the importance of Jewish ideals in their lives and in the lives of their families. These moving reflections, known as the Endowment Book of Life, are now on permanent display in the Cardo of our beautiful Reba and Sam Sandler Family Campus of the Tidewater Jewish Community. By making a permanent commitment to the Jewish community, members have taken the first step toward becoming part of this important Society.



Celebrate stories of donors' intent

[Click here to view.](#)



Invite donors to tell their own stories and partner in inspiring others



LEAVING HER LEGACY

Patty wants to make sure the support she once needed will be there for the next generation.



JEWISH FAMILY SERVICE
OF THE LEHIGH VALLEY

Seymour and Sheila Herman Make a Splash

Through an extraordinary gift from Seymour (Sy) and Sheila Herman to the Centennial Capital Campaign, the new indoor aquatics center will bear their name and legacy. The aquatics area has been a special passion to the Hermans. While working at IBM in the 1970s, Sy routinely spent his lunch hour swimming laps at the JCCGW indoor pool, an activity that he is convinced has contributed to his good health and has added years to his life. In 1993, Sy and Sheila established the *Seymour and Sheila Herman Aquatic Fitness Endowment Fund* to help support aquatic fitness programs at the JCCGW in perpetuity. The Hermans are leaving a bequest to the JCCGW as part of their pledge commitment.

“We are creating a legacy at the JCCGW because there is no greater community organization in providing human kindness and caring for our community.” – Sheila and Sy Herman



Invite donors to tell
their own stories
and partner in inspiring others

Garnering a Legacy

“We didn't realize how strong the education is until we talked to families who moved here from other cities and their children needed extra help to catch up!” shares Jenelle and David Garner. They firmly believe attending a Jewish Day School is integral to reinforcing Jewish values and traditions and the level of education at RMBA is exceeding their expectations. This made signing a letter of intent for the Create a Legacy program an easy decision for the Garners.

Create a Legacy is jointly funded by the Houston Jewish Community Foundation and the Harold Grinspoon Foundation in partnership with area synagogues, agencies and day schools. It is a two-year initiative that brings Houston's Jewish organizations together to ensure a dynamic and enriched future for the community by securing legacy gifts. During the first year, RMBA secured well above the 18 signed letters of intent needed to ensure a \$6,000 incentive participation gift. In year two we are once again seeking an additional 18 commitment letters. The program helps individuals and families form legacy gifts to provide permanent sources of support for specific Jewish causes they care about.

The strength of RMBA's secular and Judaic education appeals to the Garners and they see their children Yari (12th Grade), Akiva (10th Grade), Shira (7th Grade) and Shayna (5th Grade) thrive on a daily basis. “The school is a warm and loving place where the staff knows each child and how they learn best, what makes them happy and when they need extra attention. RMBA allows our children to pursue goals and paths without any limitation.”

Thank you to our RMBA Create a Legacy Donors

Anonymous
Joseph and Yvette Joy Blog
Dena and Baruch Brody
Elena and Barry Diner
Howard and Beverly Feldman
Jenelle and David Garner
Tova and Pablo Gernalnik
Melany and Uri Ghelman
Dorit and Rick S. Guttman
Tania and Yosef Levenstein
Robert and Barbara Levy
Mindy Mitzner
Regina Rogers
Dani and Gavriella Roisman
Susan and Max Reichenthal
Annie Scheckter
Neil Scheckter
Martin and Sharon Scheckter
Estate of Goldye M. Spain
Earl S. Spielman
Harry E. Wilbanks

As of September 1, 2016

If you would like to learn more about the Create a Legacy Program, contact the RMBA Development Director at 713-723-7170



years to come and our financial commitment whatever that may be in the distant future is critical to its continued success.” They have also committed to their synagogue, UOS, the center of th beliefs.

RMBA is dex the school's fin maintaining th academic excell might not have to after-lifetime recognize that an impact and relieve that balar we can't imagin money.”

Individuals lik choosing to mal after-lifetime gil impact on RMI come. The prog principle that al age, wealth or at enduring impact the misnomer t means you mu financial pledge. amount is appre up. You can d of your estate o

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.

so easy to pledge and to make a change conclude, “Our children know that we Create a Legacy program and feel proud that we feel strongly about the future of the Houston Jewish Community.” ■

Share stories in print



Dr. Harry Gershenowitz: *Living and Leaving a Legacy*

This past May, the Jewish Community Foundation, Inc. invited Barbara Greenspan Shaiman, a dynamic author, speaker, and community leader, to talk about her concept of "Living Your Legacy Now" at our LIFE & LEGACY™ celebratory event. Barbara captivated the audience, expounding on how important—and rewarding—it is to develop your own unique path to improve the world in a way that fits your passions.

The High Holidays can be an ideal time to think about your legacy over the past year, and going forward. As we turn the page on a New Year, you may ask yourself, "What have I done to improve the world this past year? What can I do to ensure that I do an even better job next year?" Over time, your contributions in improving the world will be compiled in your life's legacy. But your legacy can even extend beyond your lifetime by supporting the causes that are nearest and dearest to your heart, by creating an endowment fund.

Take Dr. Harry Gershenowitz (pictured, of blessed memory), for instance. Dr. Gershenowitz lived his life to the fullest, and did his part to improve the world. After a hardscrabble upbringing in Brooklyn, Dr. Gershenowitz, an amateur

archaeologist, went on to discover a lost Jewish settlement in Gloucester County known as Ziontown which was abandoned in the 1890s, as well as a grown-over Jewish cemetery near Mays Landing. He was a voracious reader and writer and a much-loved professor at Rowan University. At the age of 86 he became a bar mitzvah in 2012, and passed away in



Dr. Harry Gershenowitz

award more that provi services to

We he communi you. It's person m. and leavin

If you' "live you legacy for Deren M 2541 or a is here assistance

for you and your family.

STUART MUSKIN

Stuart was a successful Omaha businessman and a dedicated volunteer in the Jewish community, as well as the greater Omaha community. Stuart and his wife, Bettie, established three endowment funds 15 years ago at the Jewish Federation of Omaha Foundation: the Bettie and Stuart Muskin JCC Youth Sports Fund, the Bettie and Stuart Muskin Jewish Senior Services Endowment Fund, and the Bettie and Stuart Muskin PACE Fund.

The Bettie and Stuart Muskin JCC Youth Sports Fund has supported JCC sports programming and helped sponsor Maccabi games, impacting many youth in the community. The Bettie and Stuart Muskin Jewish Senior Services Fund supports programs and activities for seniors living in the Omaha metropolitan area. The Bettie and Stuart Muskin PACE Fund will perpetually endow the Jewish Federation of Omaha Annual Campaign in future years.

Many in the Omaha Jewish community have benefited from the generosity of the Muskins, and many more will benefit in the future. Stuart passed away in January of this year; our sincere sympathy to Bettie and the entire Muskin family.



Stuart and Bettie Muskin

Photo credit: Rowan University

Honor gifts
in ways that show prospective
donors how you'll honor them, too.





Honor donors in front of
the community
Double benefit:
committed AND prospective donors



Jewish Federation of the East Bay

March 7 · 🌐

👍 Like Page



From the Blog: Our legacy donors sustain us well into the future. On behalf of all of us at Federation and Foundation, thank you for ensuring our work continues for generations to come. 🧑‍🦳 ⚡ 🧑‍🦳



Thanking our Legacy Donors

On Sunday, March 4, the Jewish Federation and Foundation hosted an appreciation brunch for members of the Federation and Foundation Legacy Society, at the home of Mark Moss, Legacy Chair, and Lisa...

JFED.ORG

Honor & appreciate
on social media



Berith Sholom is with Jayne Architzel and 3 others.

April 19 · 🌐



Along with Margaret Harvey and Bob Green (not pictured), we your LIFE & LEGACY team gratefully acknowledge Karen Klevanosky and Ferne L Dutkin and Dr. Eric Bello who have stepped into the Legacy Circle at Congregation Berith Sholom. Along with all the members of this team, kk and Ferne and Ric are participating in the LIFE & LEGACY incentive grant program of the Harold Grinspoon Foundation and the Jewish Federation of Northeast New York. Their generosity will make a vibrant, thriving Berith Sholom possible for generations to come---not to mention helping us secure our unrestricted incentive grant for this first year of our initiative. THANK YOU, kk and Ferne and Ric!

Please join me in thanking all of our generous donors! Shabbat shalom!



Spotlight new commitments



Gordon JCC ✓

May 9 at 3:57pm · 🌐

👍 Like Page ...

Carla Rosenthal and Dara Miller Freiberg were pleased to accept the incentive grant for the Gordon JCC at the Year One LIFE & LEGACY celebration this past Sunday night, hosted by Jewish Federation of Nashville and Middle Tennessee. The Gordon JCC has received 31 LOIs from donors who have agreed to leave a legacy gift to the J and other Jewish organizations in the Nashville community through the LIFE & LEGACY program. For more information about how to leave your legacy, contact Dara at 615-354-1639.



Showcase role models & invite readers to join them

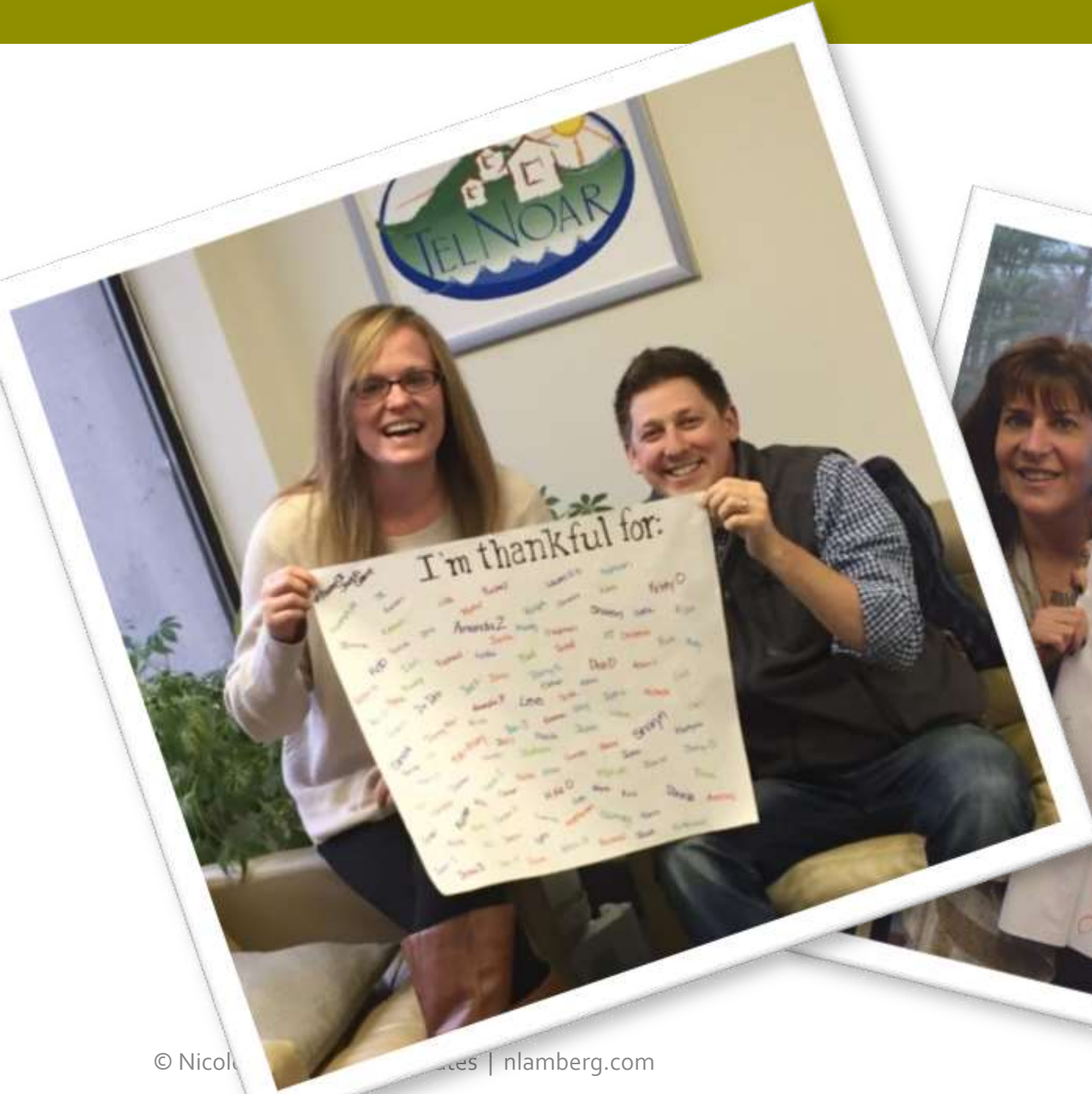


Thank with photos

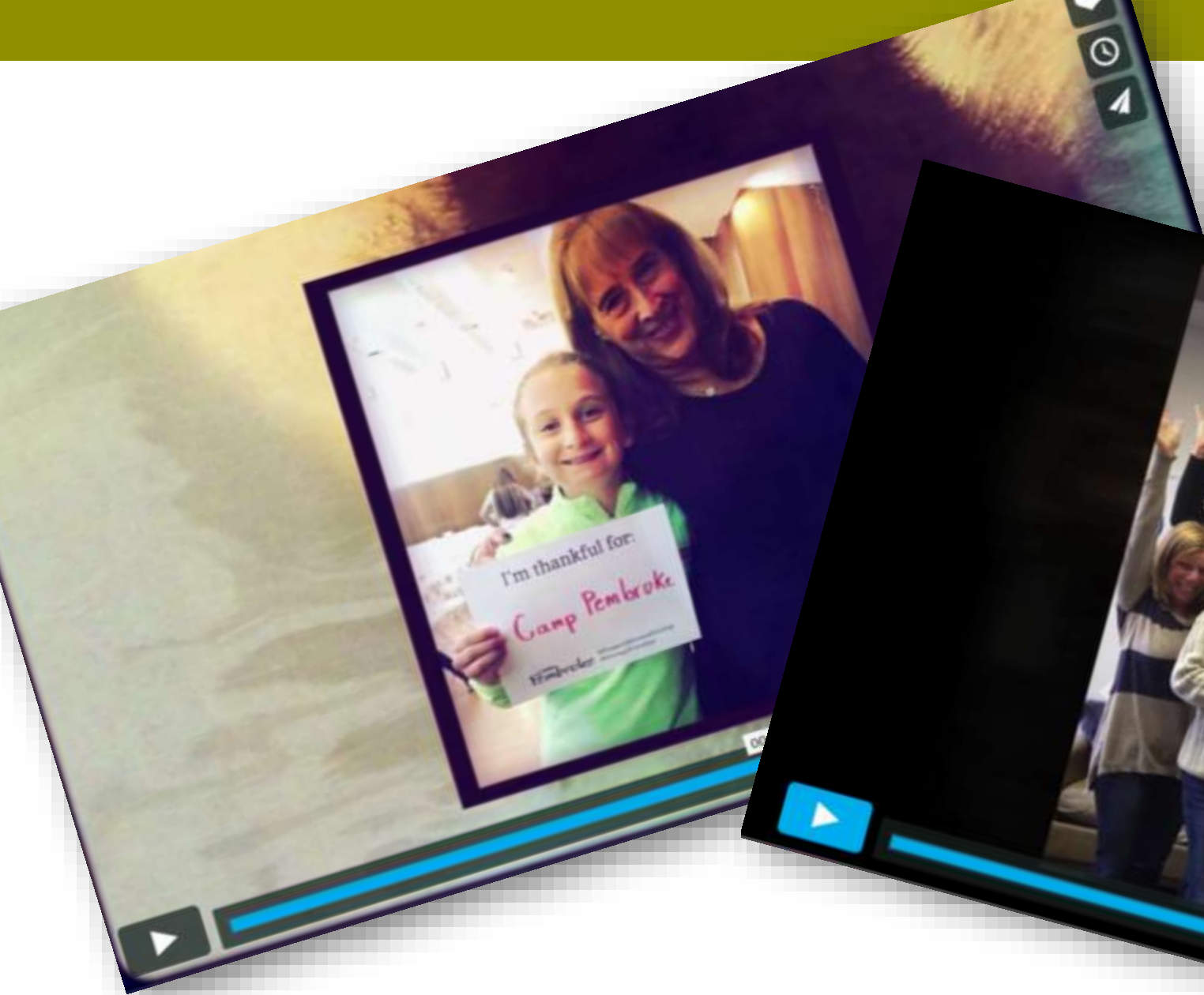


Thank with photos

Thank with photos



Thank with videos



Connect with holiday cards



Community: East Bay, CA
Organization: Jewish Federation and the Jewish Community Foundation of the East Bay
Item: Thank you Notes
Contact: Mollie Breger
Mollie@jfed.org

Send postcards from special places





Keep donors close
at special moments

2015



Harper College Educational Foundation



HOME | ABOUT US | WHAT WE DO | GET INVOLVED | COMMUNITY P

Create memorable experiences to grow joy and commitment

Harry Greenstein Legacy Society & Circle of Giving Recognition Event

You're invited to an exclusive, pre-show reception and an intimate theater experience, as we thank our most thoughtful, generous and loyal donors.



Create memorable experiences to grow joy and commitment



Adolph & Rose Levis
Jewish Community Center



Create memorable experiences to grow joy and commitment

DONOR DAY 2017 BECAUSE OF YOU...

Because of YOU our campers are having the BEST SUMMER EVER! Donor Day is right around the corner and we'd like to invite you to come and experience camp with our kids and teens in an adventurous, active and healthy day! Thanks to donors like you, we can ensure that all youth have the chance to experience camp and create memories to last a lifetime.

Register for any of our Donor Days below:

Cordova

Wednesday, July 12th

Davis

Monday, July 10th



Consider a small gift

THANK YOU!

Thank you for giving to the YMCA of Greater Charlotte in 2013. Because of you, our Y was able to raise \$4,703,271 to support those who need us most in our community.

Your gift is giving young people a chance to achieve their potential, empowering people of all ages to lead healthier lives and strengthening the bonds of our community.

Every gift matters, especially yours, as we work every day to ensure a brighter future for our community. Thank you. Together, we're able to do so much more.

YMCA OF GREATER CHARLOTTE

The Y. So Much More™



FOR YOUTH DEVELOPMENT
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY

WE CAN DO SO MUCH MORE BECAUSE OF



Keep saying
Thank You



FIRST TIME AT
SUMMER CAMP



FIRST TIME
RUNNING
A MILE



FIRST TIME
IN GROUP
EXERCISE



FIRST TIME
SWIMMING
ACROSS THE POOL



"Firsts" happen every
day at the Y.

Thank you for making your
first gift, so their firsts
could happen too.

YMCA of Northwest North Carolina
Our Mission: "to
potential in spir
A United Way Ag

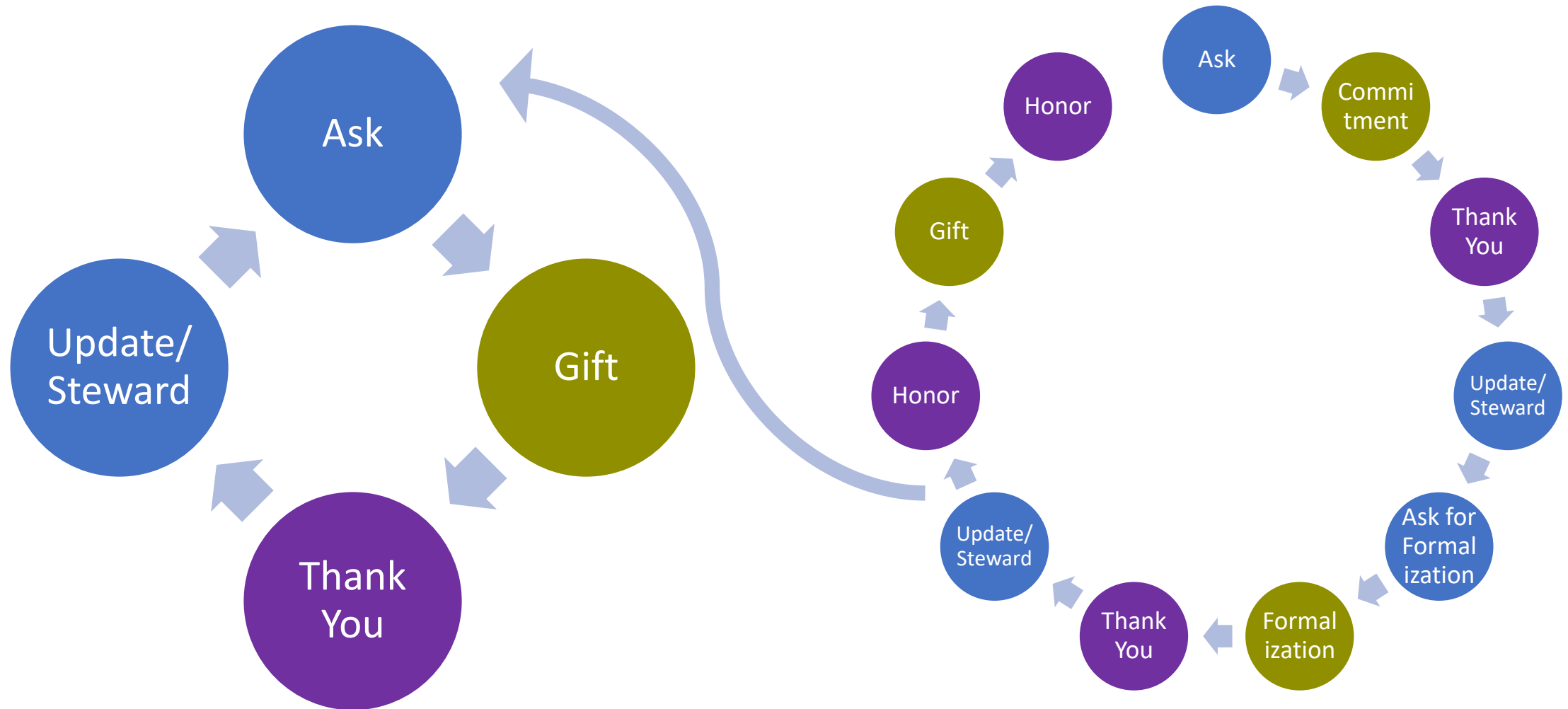
YMCA of Northwest North Carolina
701 N. Main Street, Suite 1000
Winston-Salem, NC 27101

Keep saying
Thank You

Build a culture of philanthropy



Get all the way around the Legacy Giving circle!



Bonus Thoughts



Thank Your Solicitors!



Jewish Federation
of Greater Philadelphia



Thank Your Staff!

JewishBoston blog:
Around the Camp Directors
Thanksgiving Table – A Thank You
Note to Counselors
November 27, 2014
By [Claire Winthrop](#)

Why are you thankful to your counselors?

“For their patience, tireless work and their commitment to doing what they can to have a positive impact on the life of each of their campers.” Laura Gurvis, [URJ Camp Eisner](#)



“For their desire to be on staff so that they can be there for their campers, and no longer for themselves. They really “get it” too.” Ellen Felcher, [Camp Pembroke](#)

Laura Gurvis, URJ Camp Eisner

“For their passion for Camp and giving back to their campers.” Ken Shifman, [Camp Avoda](#)



“For their patience with our kids and with me this past year as I learned all about Bauercrest in my first year. Their dedication to deliver a memorable program for our campers each and every day of the summer is unbelievable to watch.” Eric Rightor,

Eric Rightor, Bauercrest [Camp Bauercrest](#)



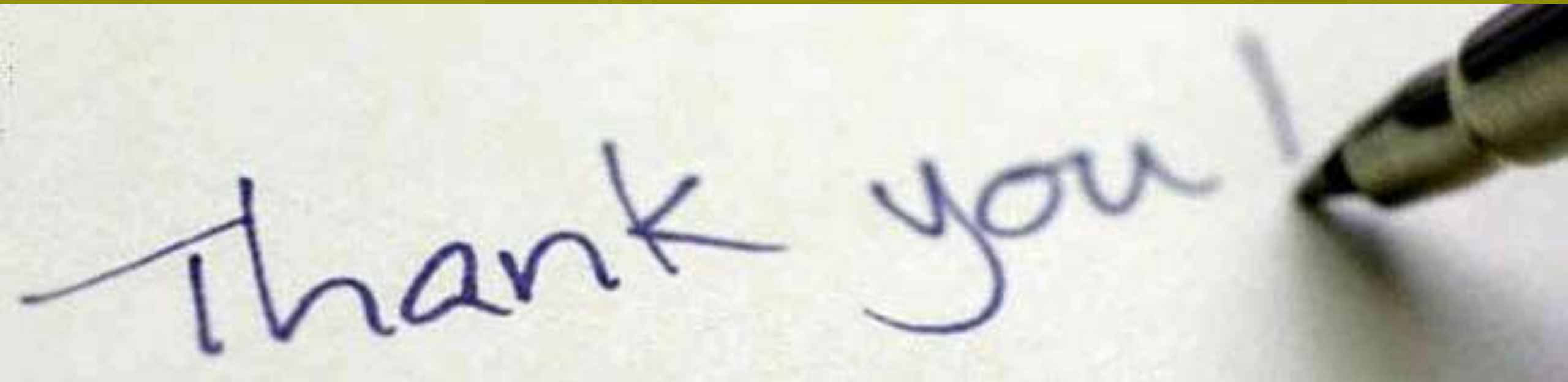
Pick a day next week to declare...

Be Your Own Donor Day

With thanks to Network for Good: <https://www.networkforgood.com/nonprofitblog/be-your-donor-day/>

Today We Covered:

- What donors are looking for in a thank you
- Systems for thanking (who/what/when)
- Thanking ideas
- Bonus thoughts
- Discussion!



NICOLE
LAMBERG
& Associates

Niki Lamberg
617.869.8695
nl@nlamberg.com
nlamberg.com