

Communicating Impact

Figuring out what matters &
Telling your story

Life & Legacy Knowledge Center
May 2019

Karen Secular, Create a Jewish Legacy Program Manager



Our process, or, so what?

- How will we know if we are successful?
- What are measures/data/quotes that will tell us?
- Who are our audiences?
- It's not just about the numbers

What we think matters

- How are we doing?
- Is anyone better off?
- The story behind the numbers - Two case studies

Temple Emanu-El's Success

Create a Jewish Legacy as of March 28, 2018

47 gifts
Future Value Approximately
\$1.3mil



Total Number of Legacy Gifts in Our Community

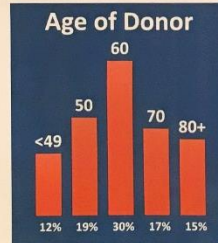
Create a Jewish Legacy as of March 28, 2018

813
to 20 organizations:
14 synagogues
5 agencies
1 day school



Who is making legacy gifts?

Create a Jewish Legacy as of March 28, 2018



How people make legacy gifts

Create a Jewish Legacy as of March 28, 2018

54%
are bequests in wills or trusts
26%
are retirement plan assets
20%
are via life insurance, cash, other



How Well Are We Assuring Jewish Tomorrows?

A presentation to the Board of Trustees of the
Jewish Community Foundation of Greater MetroWest NJ
November 7, 2017 (rev. March 2018)

Karen Secular, Create a Jewish Legacy Program Manager



CJL by the Numbers



Total Number of Legacy Gifts in Our Community

1,012

to 23 organizations:

17 synagogues

5 agencies

1 day school

Estimated Future Value

Approximately

\$29

million

Create a Jewish Legacy as of May 15, 2019

**We know the
value of 64%
of the gifts.**

**Of the gifts we know,
the average size is approximately**

\$ 28,800

How people make legacy gifts

Create a Jewish Legacy as of May 15, 2019

46%

are bequests in wills or trusts

33%

are retirement plan assets

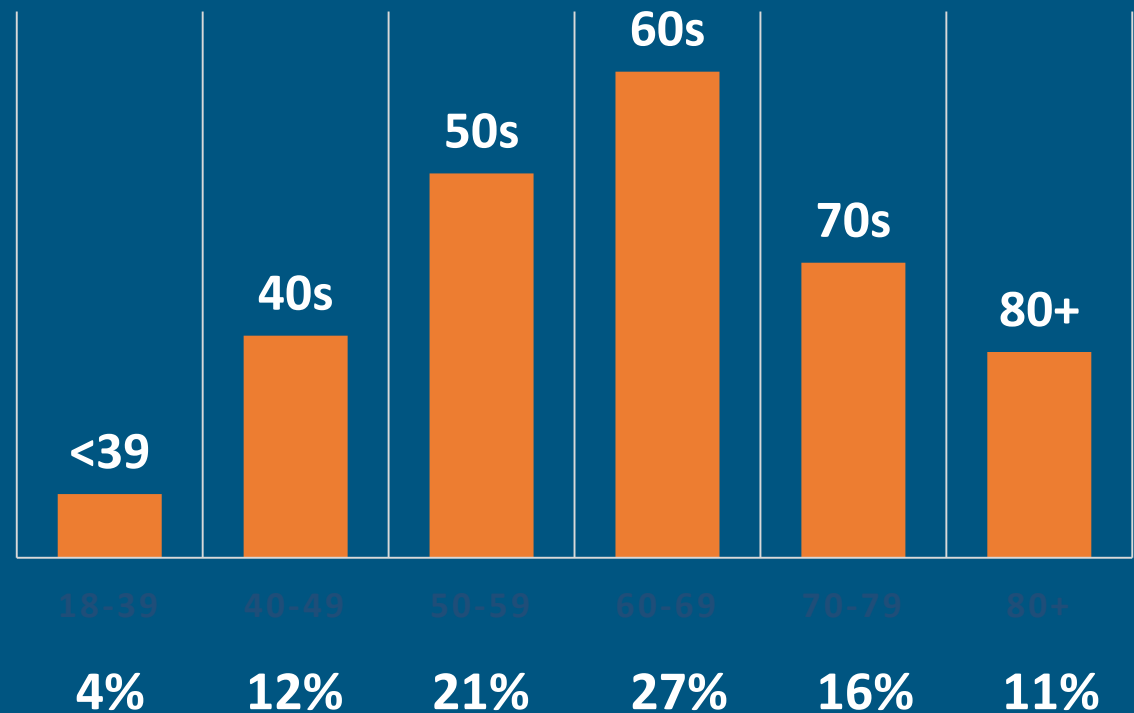
21%

are via life insurance, cash, other

Who is making legacy gifts?

Create a Jewish Legacy as of May 14, 2019

CJL DONORS BY AGE





J JCC MetroWest


CREATE A JEWISH LEGACY
GREATER METROWEST NEW JERSEY

*An initiative of the Jewish Community Foundation
and Jewish Federation of Greater MetroWest NJ*

**LIFE &
LEGACY**
OF GREATER METROWEST NJ



Jewish Federation[®]
OF GREATER METROWEST NJ
JEWISH COMMUNITY FOUNDATION

CJL provided 9 trainings to Legacy Teams

- Why Legacy? Why Now?
- Creating Your Legacy Plan
- Having the Conversation
- Marketing Your Program
- Excellent Donor Stewardship
- Donor Testimonials: Telling Powerful Stories
- Integrated Ask: Annual & Legacy, Yes!
- Best Practices & Trends in Legacy Giving
- What Does It Mean to be Donor-centric?

Create a Jewish Legacy as of June 30, 2017

Who we've engaged

More than 150
lay leaders
have become involved
in the CJL effort

How Are We Doing?

The background of the slide is a solid orange color. Overlaid on this background is a pattern of stylized, light-orange leaves or petals. These shapes are arranged in a way that suggests a larger, symmetrical floral or sunburst-like pattern, with some shapes pointing towards the center and others pointing outwards. The leaves vary in size and orientation, creating a textured, organic feel.

Exceeding Goals

Group 1

Create a Jewish Legacy as of June 30, 2017

YEAR 1

All 15 synagogues and agencies met their goals

6 exceeded them

YEAR 2

All but 2 synagogues and agencies met their goals

7 exceeded them

YEAR 3

All synagogues and agencies met their goals

13 exceeded them

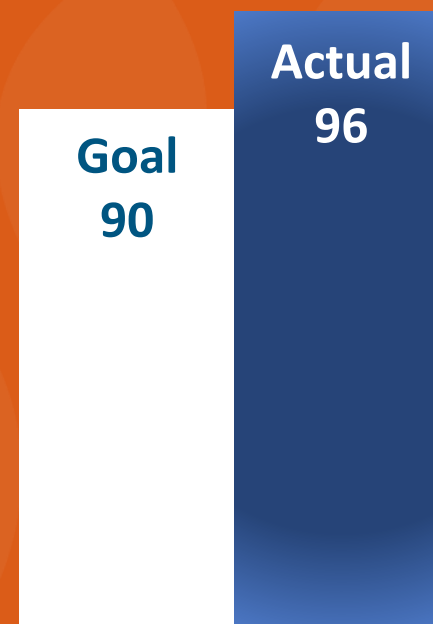
Exceeding Goals

Group 2 (5 organizations)

Create a Jewish Legacy as of June 30, 2017

of Gifts Obtained

Group 2



Year 1

Exceeding Goals

Group 2

Create a Jewish Legacy as of June 30, 2017

YEAR 1

All 5 synagogues and agencies in Group 2 met their goals

3 exceeded them

YEAR 2

4 out of 4 organizations met their goals

3 exceeded them

**Is Anyone
Better Off?**

YES!

Agencies & Synagogues Are Better Off

Short-term:

Benefitted from >\$500k in
incentive grants from
JCF & HGF

Long-term:

Better equipped to solicit
gifts of all types & steward
all donors

YES!

Agencies & Synagogues Are Better Off

“We knew for years that we had to start an endowment program but we just didn’t know how to do it.

We needed the tools to get started.

Then CJL came along and you’ve given us that and so much more.”

JFS - MetroWest



DATE: August 2, 2017
PAY TO THE ORDER OF: **Mt. Freedom Jewish Center**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Jewish Community Housing Corporation**
Five Thousand and no/100 \$5,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Congregation Beth Israel**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Adath Shalom**
Five Thousand and no/100 \$5,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Jewish Family Service of Central NJ**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Jewish Service for the Developmentally Disabled**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **JCC of Central New Jersey**
Five Thousand and no/100 \$5,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Congregation B'nai Israel**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Union County YWHA of Union County**
Five Thousand and no/100 \$5,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Jewish Family Service of Metrowest NJ**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Oheb Shalom Congregation**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Morristown Jewish Center Beit Yisrael**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Temple Beth-El Mekor Chay**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Congregation Ohr Shalom-Summit JCC**
Five Thousand and no/100 \$5,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

DATE: August 2, 2017
PAY TO THE ORDER OF: **Congregation Agudath Israel**
Seven Thousand and no/100 \$7,000.00
MEMO: Incentive Grant Award
Jewish Community Foundation

YES!

JCF is better off

10

**CJL organizations
opened new funds at JCF
(Eventually they all will)**

YES!

JCF is better off

CJL organizations moved

>\$900,000

in existing endowment
funds from other financial
institutions to JCF

The Story Behind the Numbers

Mt. Freedom Jewish Center Randolph, NJ

Create a Jewish Legacy as of May 15, 2019

Total number of gifts

51

% of membership

40

CJL average is 16%

Temple Beth-El Mekor Chayim Cranford, NJ

Create a Jewish Legacy as of May 15, 2019

Total number of gifts

75

% of membership

31

The Secret Sauce

CULTURE:

**Don't need
to be BIG
to do this well!**

The Secret Sauce

CULTURE:

**They both seem to
have tight-knit
congregations.**

The Secret Sauce

CULTURE:

They both have strong fund-raising cultures *and* have enthusiastically embraced the practice of donor stewardship.

The Secret Sauce

CULTURE:

They've incorporated legacy giving into the fabric of what they do at their synagogues.

The Secret Sauce

CULTURE:

They make good (and frequent!) use of mentorship offered by CJL staff.

The Secret Sauce

LEADERSHIP:

Both have strong, charismatic leaders who are well-known within their organizations and seem to be well-liked.

The Secret Sauce

LEADERSHIP:

Leadership is
comfortable asking
people to be part of CJL.
No reluctance.
Conversations flow
freely.

The Secret Sauce

PROMOTION:

Celebrate annual Legacy Shabbat

Display legacy society banners in lobby

Publicize CJL on webpages and often in newsletters

Host donor celebrations



Jewish Community
OF GREATER
Foundation METROWEST NJ