A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of yellow, orange, and red, set against a solid blue background.

# ACE Bootcamp: Elevating Endowments in Your Annual Campaign

Laura Linder, President & CEO Jewish Community Partners  
Memphis, TN

Leslie Pomerantz, Executive Director Fundraising Institute  
Jewish Federations of North America



# Our Universal Truths

- Aging Donor Base
- Next Generation that isn't stepping up at the same levels
- Pressure of raising annual gifts year and after

AND.....

- We have extremely loyal donors
- Incredibly strong case for giving
- Long-term success and impact on our communities
- Recognizable brand

**WE ARE PRIMED FOR ENDOWMENT**





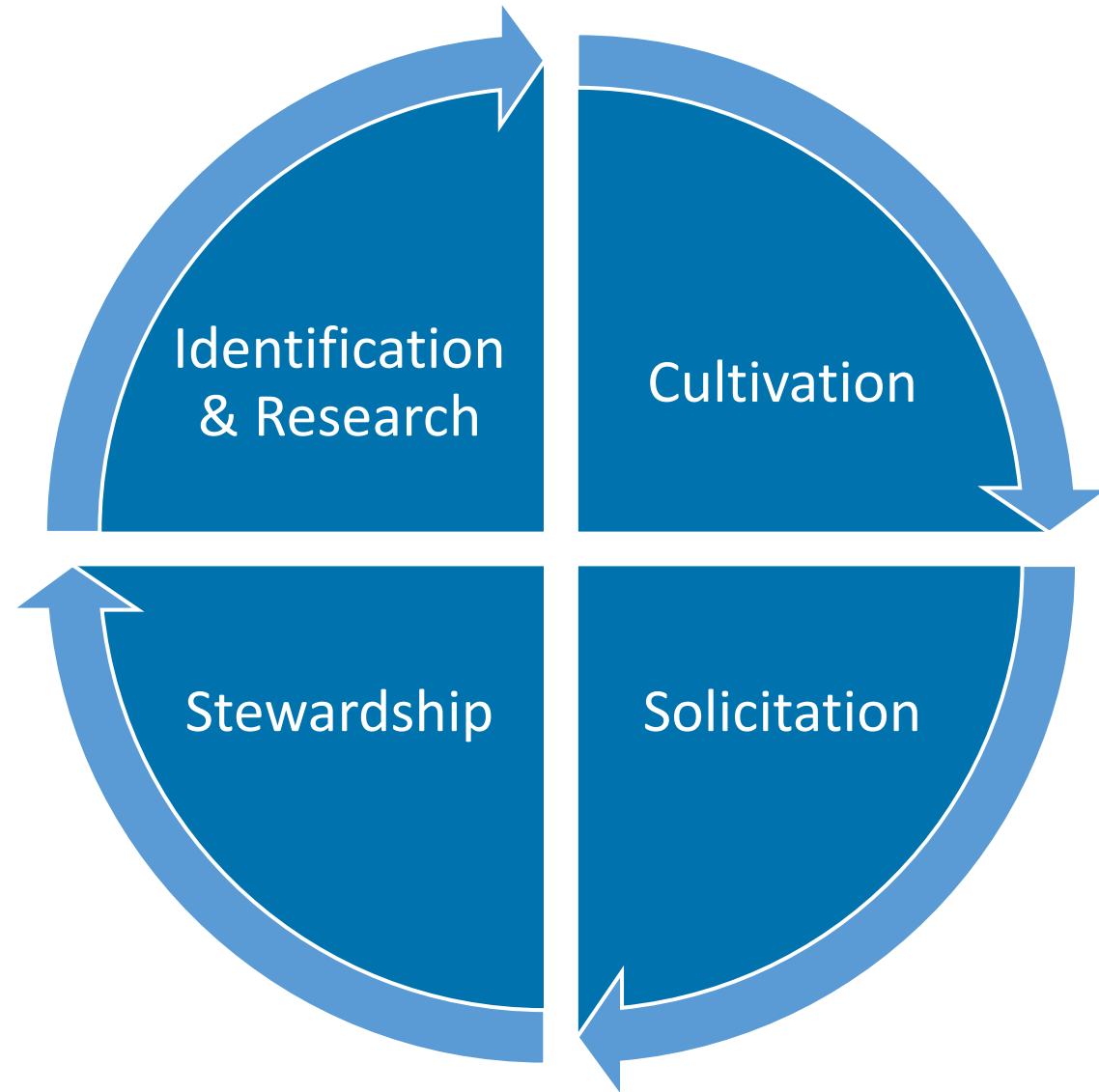
# Building an Endowment Culture



1. Leverage National Resources
2. Share examples/testimonials
3. Rally your leadership – get buy-in
4. Incorporate legacy language in your messaging
5. Provide high visibility to endowment wins









# Identification and Research

Join at [menti.com](https://menti.com) | use code 5857 0305

Mentimeter



LP

Menti

Life and Legacy



Where do you find or who are your endowment prospects? (Be Creative!!)

Choose a slide to present

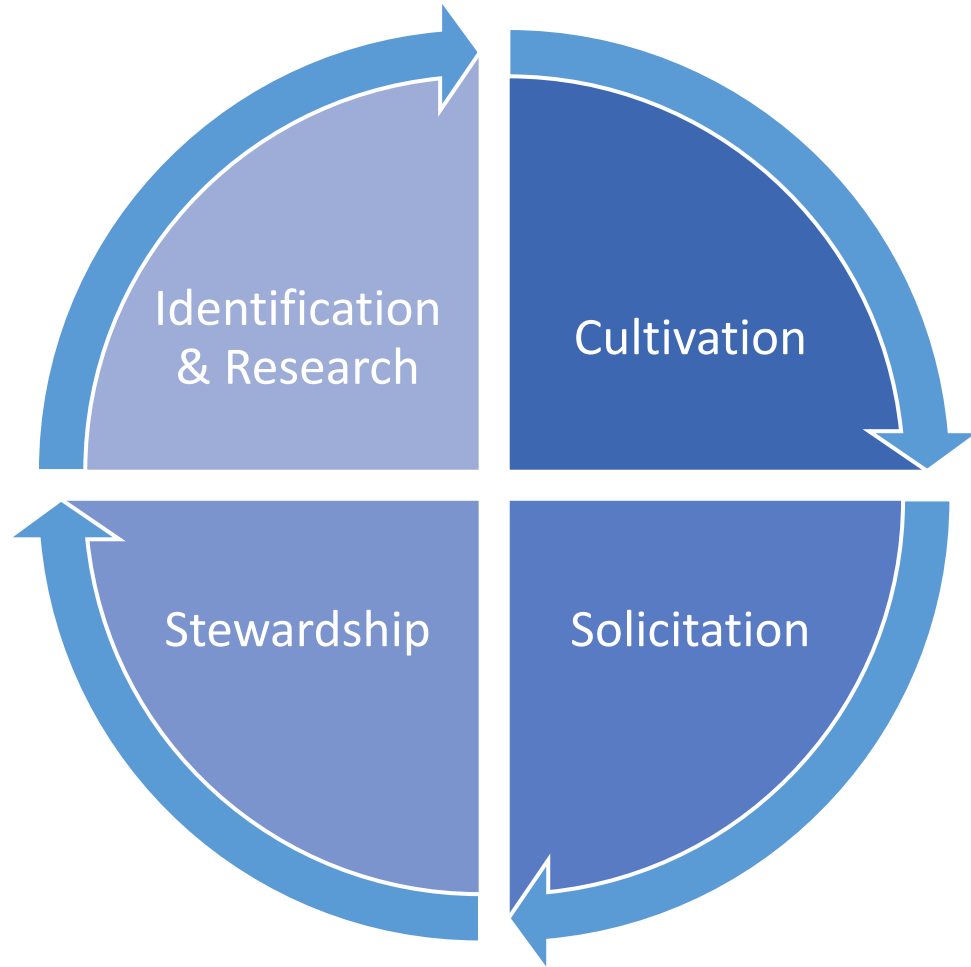


transpiration  
bold  
creative  
fast  
inspiration  
focus  
leader





# Identification and Research



Make a list of 5 prospects





# Cultivation

JOIN US FOR A CELEBRATION OF OUR



*Pillars*  
OF THE COMMUNITY  
MEMPHIS JEWISH FEDERATION

CELEBRATING DONORS WHOSE UNRESTRICTED CUMULATIVE GIVING TO  
MEMPHIS JEWISH FEDERATION EXCEEDS \$250,000





# Honorees

## *Diamond Pillar*

*\$10 million and above*

Plough Foundation

## *Platinum Pillar*

*\$5 million - \$10 million*

Belz Foundation

## *Gold Pillar*

*\$2.5 million - \$5 million*

Goldsmith Foundation

Lichterman Loewenberg Foundation

## *Silver Pillar*

*\$1 million - \$2.5 million*

Cooper Companies

Martha and Robert Fogelman

Jan and Andrew Groveman

Barbara and Ira A. Lipman

## *Bronze Pillar*

*\$500,000 - \$1 million*

Wendy and Avron Fogelman

Goldstein Goodman Foundation

Peggy and Leo R. Jalenak, Jr.

Judy and Morris Kriger

Leach Family

Nancy and Michael Levinson

Lewis Charitable Trust

Malco Charity Trust

Evelyn and Jerome Makowsky

National Mortgage

Ronna and Hal Newburger

Judy and Nick Ringel

Honey and Rudi Scheldt

Louise and Jerry Sklar

Linda and Edward Young

## *Star Pillar*

*\$250,000 - \$499,999*

Suzanne and Scott Baum

Bert Bornblum\*

Patricia and Sam Chafetz

Marlene and Herbert Gerson

Donna and Robert Goodman

Iris and Ronald Harkavy

Jolle and Michael Klsber

Leslie and Nat Landau

Sue Ann and Bernard Lipsey

Lowenstein Foundation

Magdovitz Family Foundation

Diane and Paul Mendelson

Robin and William Orgel

Mary Lynn and Arnold Perl

Linda Ellen and Ronald Sklar

Jackie and Robert Solmson

Jill and Ken Steinberg

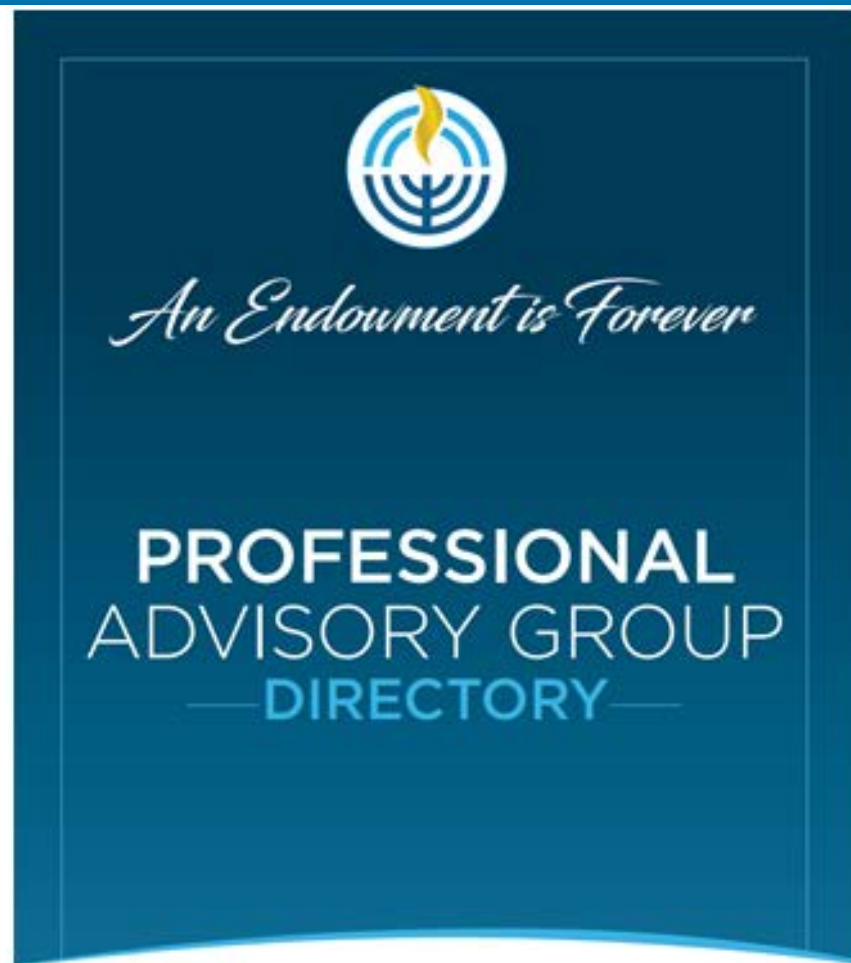
Diane and Larry Wruble

Reggie Wurzburg\*

**\*of blessed memory**



# Cultivation- The Professional Advisors!!



JEWISH FOUNDATION OF MEMPHIS  
JCPMEMPHIS.ORG/FOUNDATION



**C. Michael Adams** CPA, JD, LL.M

Attorney | Evans Petree, PC

Michael concentrates his practice primarily in the areas of estate planning, taxation, wills and trusts, and probate administration. Mr. Adams began providing tax and accounting advice to clients in 1990 as a tax accountant and has practiced law since 1998. He is one of only eight attorneys in Memphis who are certified as an Estate Planning Specialist under the rules established by the Tennessee Supreme Court.

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**Lawson Arney** CFP

Vice President | Raymond James

As a financial advisor, Lawson loves helping people make smart decisions with their money based on their goals and values. He works with many individuals and couples nearing retirement age by assisting them navigate the complexities of Social Security and Medicare, as well as developing a retirement income strategy. He also enjoys collaborating with people in their 20s and 30s to develop good financial habits and build a strong foundation. He cares deeply for his clients and emphasizes his philosophy of a long-term focus.

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**Olen M. "Mac" Bailey, Jr.** JD, LL.M

Attorney, Founder | The Bailey Law Firm

Mac is the founding member of The Bailey Law Firm, A Professional Corporation, with more than 30 years of legal experience. Mac concentrates his practice in the areas of Estate Planning (Wills, Trusts, Powers of Attorney, Special Needs Trusts), Elder Law (Medicaid Strategies, Veterans Benefits), and Probate (Estate Administration, Trust Administration, Conservatorships, Will Contests, Estate Disputes).

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5100 Wheels Dr., Ste. 215, Memphis, TN 38117





# Solicitation

## Three strategies:

- Impact Area Endowment
- LOJE/PACE
- Mini-Campaign





# Impact Area Endowment- Example #1

## Jewish Education Endowment

Married couple age 70. No children:

When funds are received from the estates of DONORS, the following policies will be adopted:

- Funds will be invested in accordance with other endowment funds and at the discretion of the Jewish Community Partners investment committee.
  - A one-time grant of \$120,000 will be awarded to Memphis Jewish Federation to establish a Forever Lion of Judah for DONOR.
  - A one-time grant of \$250,000 will be awarded to NAME Congregation for its endowment.

The remaining balance will become the corpus of the **DONORS Family Fund** with an annual distribution amount calculated in accordance with the Designated Fund Agreement executed on September 12, 2024 (**5% of the 3-year average balance fund on June 30 of each year**) to inspire greater participation in formal and informal Jewish education among Memphis children in grades K-12





# Impact Area Endowment- Example #2

## Individuals with Special Needs & Annual Campaign Endowment

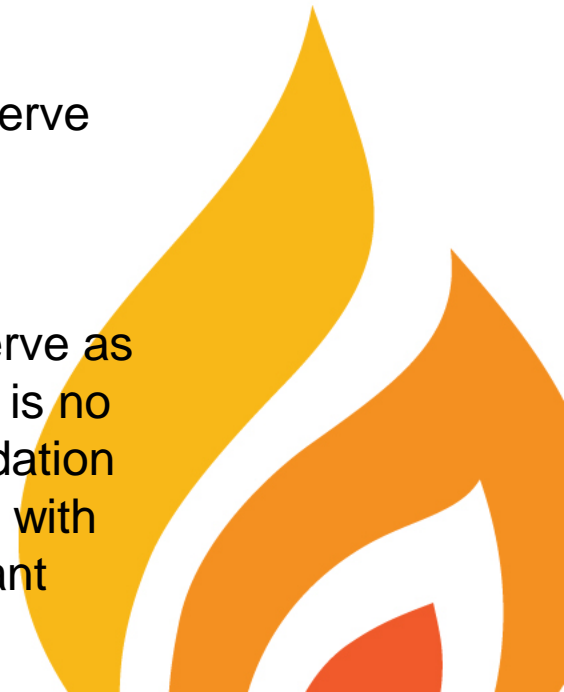
Male age 68. No spouse or children:

An amount equal to **5% of a 3-year average fund balance on June 30 of each year** shall be available for distribution to organizations and causes listed below which are qualified under section 501(c)(3) of the code and are not private foundations.

50% to organizations within or associated with the Memphis Jewish community that serve individuals with special needs (e.g. Dream Street).

50% to Memphis Jewish Federation's annual campaign.

Although unlikely, should the Memphis Jewish Federation's annual campaign no longer serve as a viable grantee, either because the organization no longer exists or the annual campaign is no longer the best vehicle to support the needs of the Memphis Jewish community, the Foundation Board of Directors will direct the grant to an alternate organization that most closely aligns with the mission and goals of Memphis Jewish Federation which is to "build and sustain a vibrant Jewish community in Memphis, Israel and around the world."





# LOJE/PACE

## Helping Lions ensure their Jewish legacy for generations to come.

Behind every Lion pin is a woman. A story. A legacy. A future.



Lions of Judah wear their pin proudly – knowing that it's an internationally recognized symbol of her philanthropy, commitment, Jewish values, and sisterhood. But the pin, as valuable as it is, doesn't have the power to share what being a Lion really means.

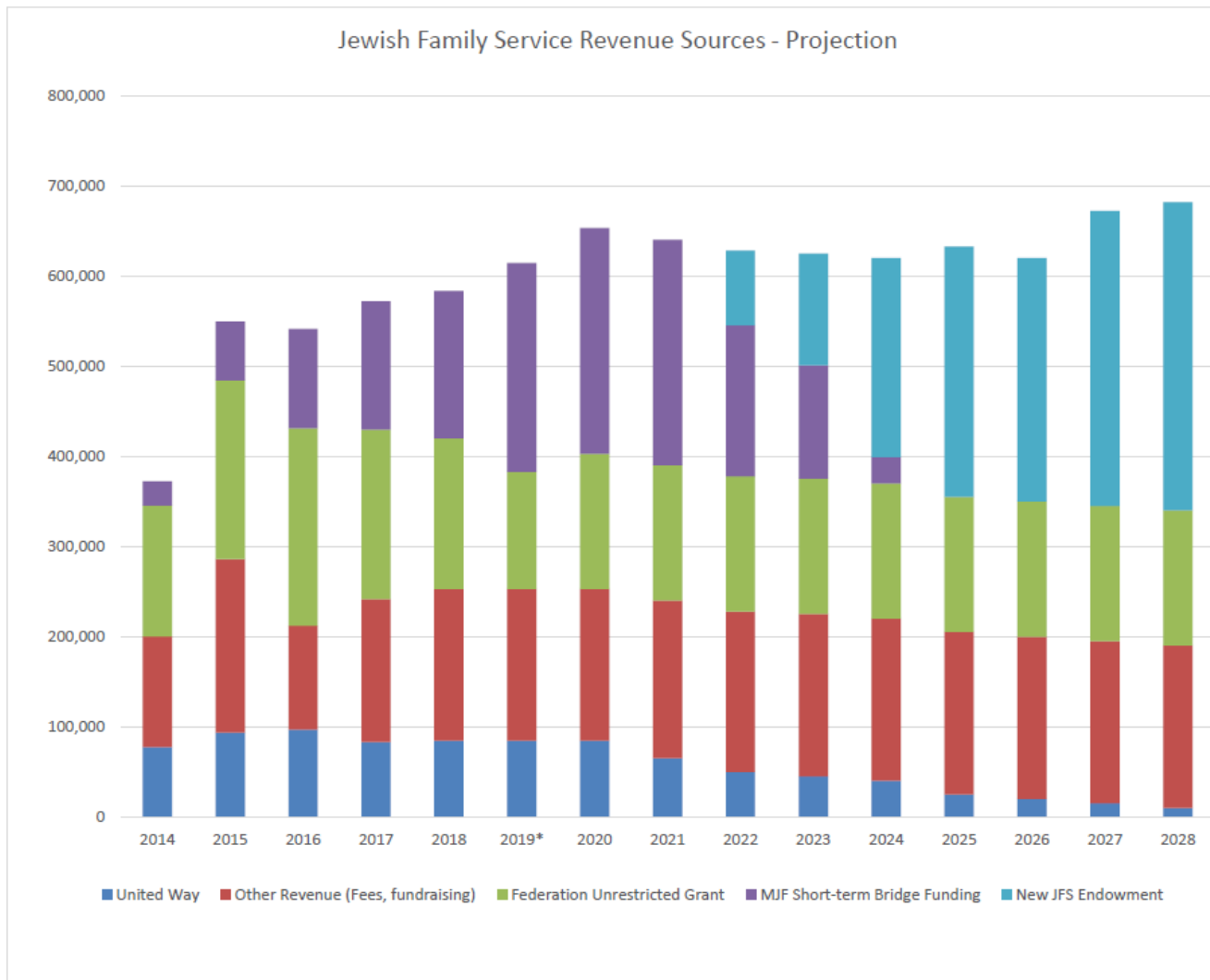
What happens when the pin gets passed down?

Lions now can pass on their legacy to the women of their family - the women they know and those who will come after.






# Mini-Campaigns





# Mini-Campaigns

	Family Sustainers							
	Bronze \$10,000+	Silver \$25,000+	Gold \$50,000+	Caretaker \$100K+	Keeper \$250K +	Protector \$500K +	Guardian \$1 million +	Partner \$2 million +
Donor Honor Roll	YES	YES	YES	YES	YES	YES	YES	YES
Recognition at Community Celebration	YES	YES	YES	YES	YES	YES	YES	YES
Listing on Permanent Plaque in JFS offices	YES	YES	YES	YES	YES	YES	YES	YES
Personal Profile or Dedication in Donor Honor Roll		YES	YES	YES	YES	YES	YES	YES
Your name presented (along with others) on individual offices along with a Mezzuah			YES	YES	YES	YES	YES	YES
Recognized as Family Sustainers at all JFS events and publications				YES	YES	YES	YES	YES
Naming/Dedication*						YES	YES	YES

\*Naming/Dedication

Agency Name  
Seniors  
Special Needs  
Information and Referral  
Families in Crisis  
Emergency Assistance

\$2.5 million TAKEN

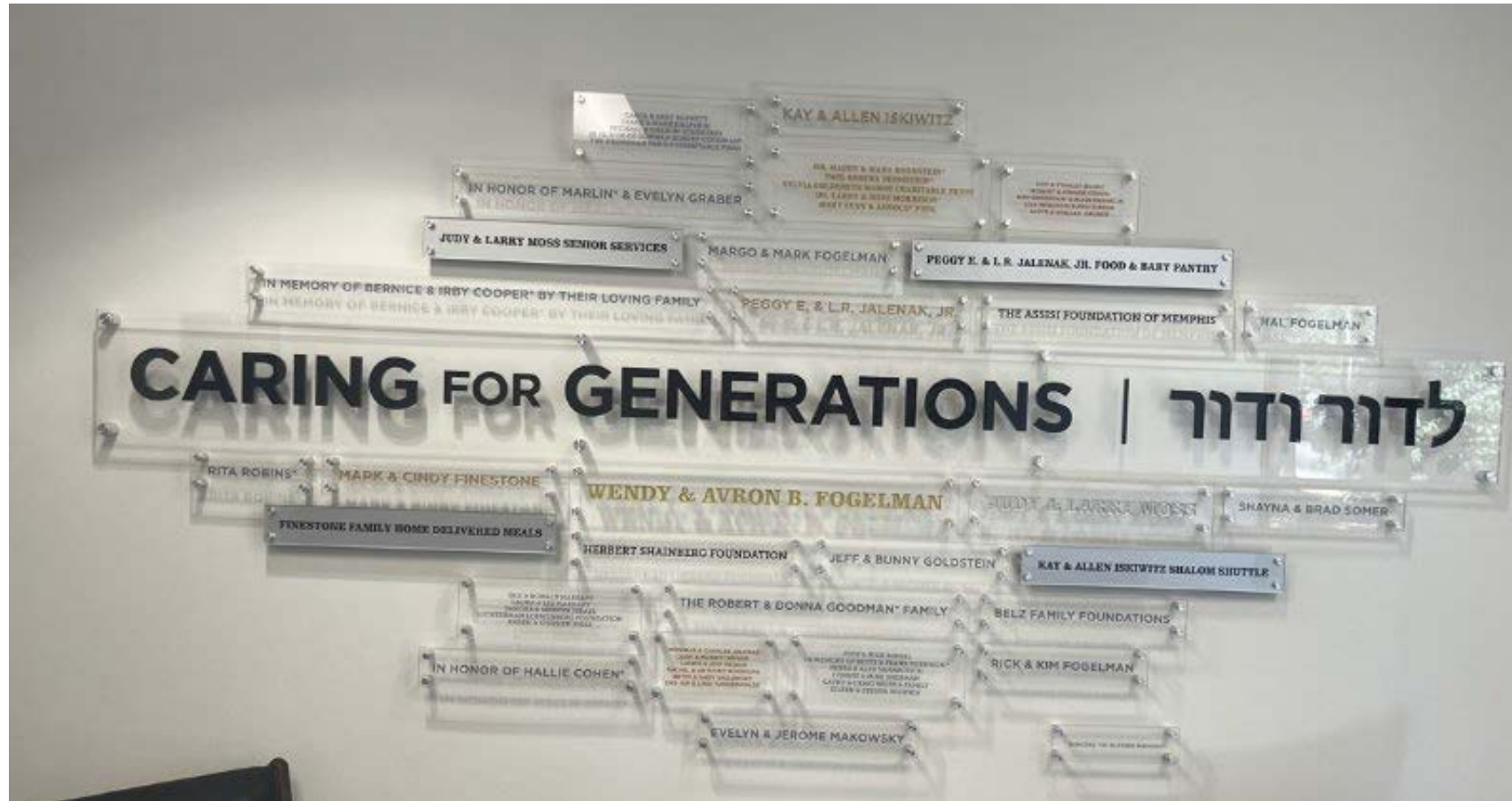
Priority area Dedication Opportunities

All donors to the campaign under \$10,000 will be recognized in the donor honor roll





# Mini-Campaigns





# Create Mini-Campaigns

Name of Program	Annual Allocation	Annual Cost X20	Three Prospects	Are you assigned to these people for their annual gifts?







# Big Ideas for Big Donors

## A Leadership Approach to Major Gift Fundraising

1. Philanthropic Inevitability
2. Timing of the Ask
3. Moving Towards “Prime”

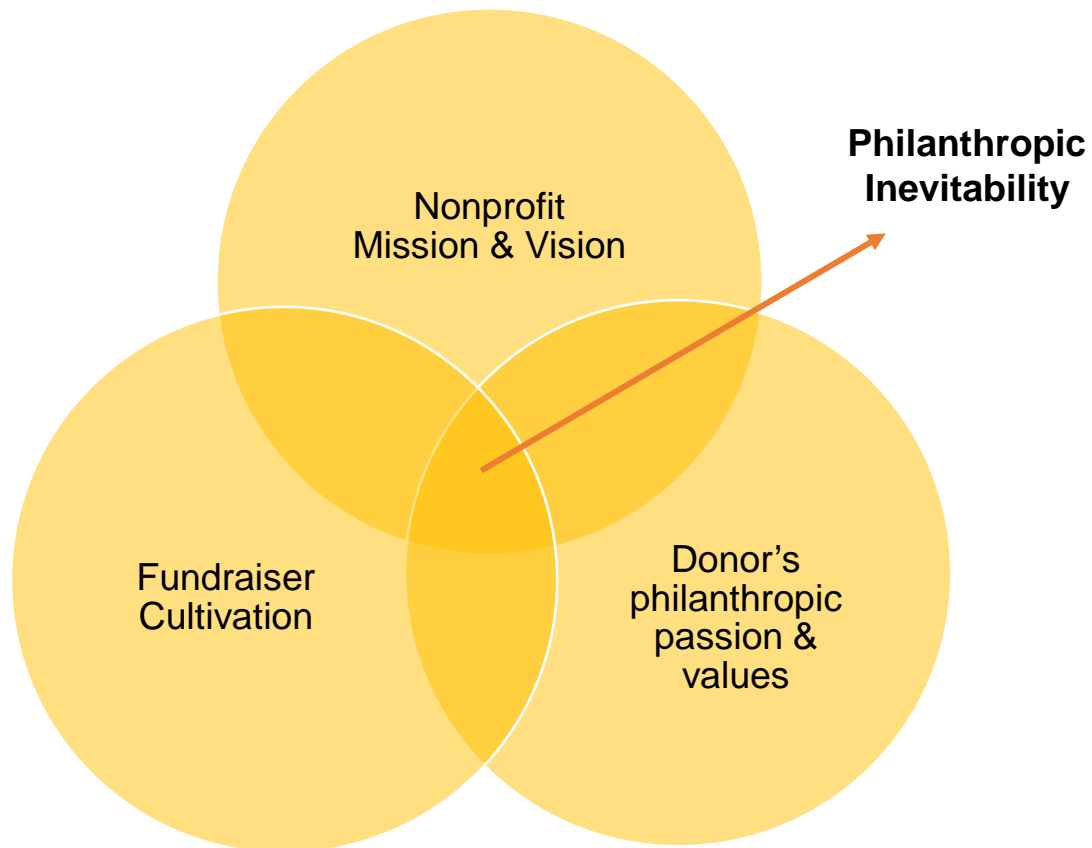


Bill Stanczykiewicz

Senior Assistant Dean, External Relations, Indiana University Lilly Family School of  
Philanthropy and Director, The Fund Raising School, USA



# Philanthropic Inevitability



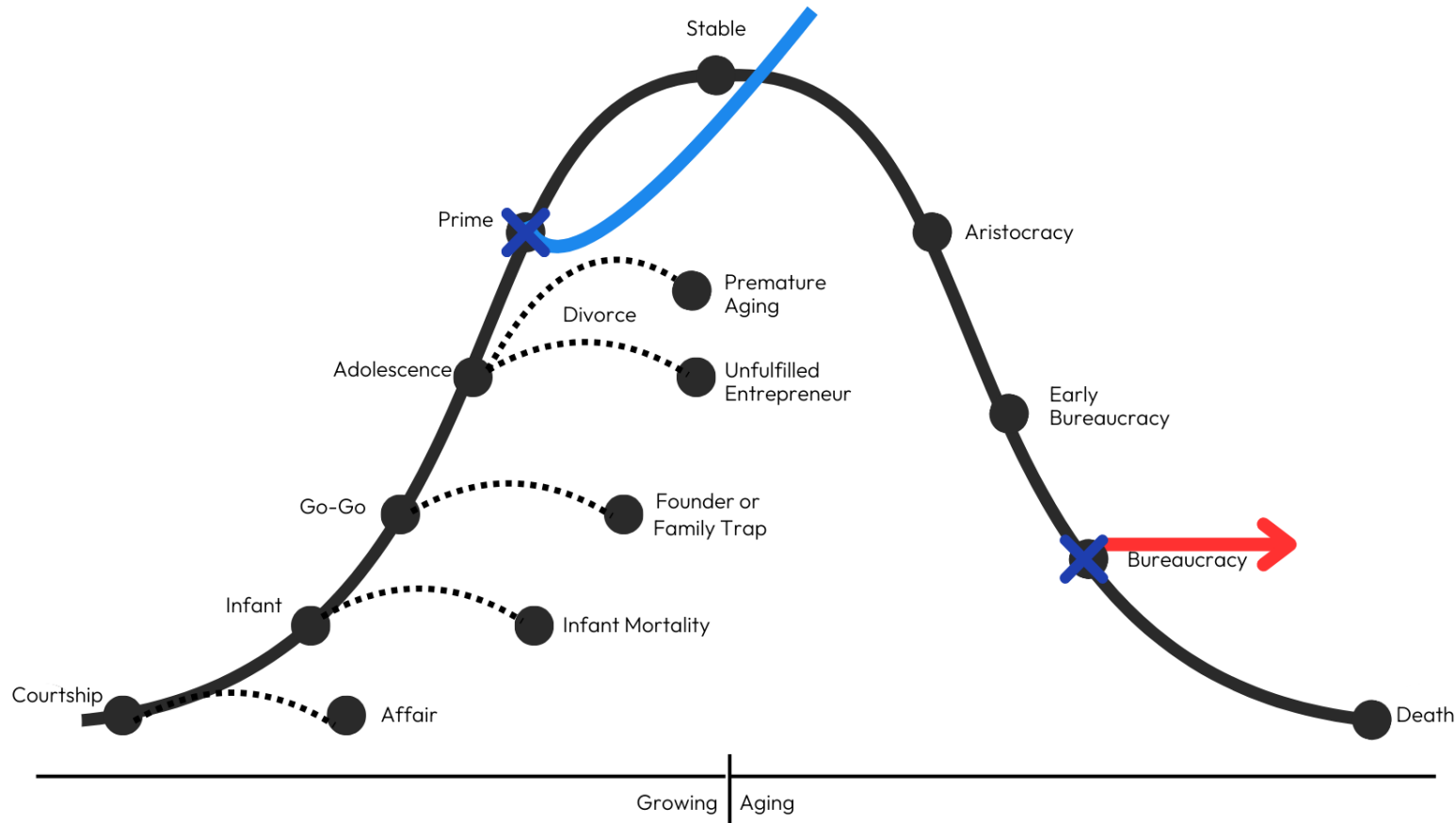
“... relationship-based, benefactor-centric, inquiry-driven fundraising. To go from a needs-based to a vision-based approach, fundraisers must be able to identify, develop, and articulate the organization’s investment-worthy ideas.”

Bout & Hodge, 2022





# Timing of the Ask



Adizes, 1988

Adizes's organizational life cycle model





# Moving Towards “Prime”

How do you know when your donor is  
“Prime”?





A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of yellow, orange, and red, located on the left side of the slide.

# Case Study

A philanthropic advisor who is involved with your Planned Giving Roundtable calls you about a person who you do not know and has significant wealth and no children. He is interested in your meeting with this prospect.





# Thank you!

**2025**

**Life & Legacy**  
**Leadership Conference**

**Harold Grinspoon**  
FOUNDATION

 **Jewish  
Federations**  
of North America