



# *The Time is NOW: Accelerate Your Legacy Strategy with Current Endowment Gifts*

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## Welcome!

2025  
**Life & Legacy**  
Leadership Conference





Major Gifts

FOR YOUR CAMP

# Agenda

- Context Matters: You, Your Org & Endowment Status
- Keys to Major Gifts Success
- The Case(s?) for Endowment: Now & Later
- Prospect Profile
- Asking Strategies
- Discussion & Action
- Gratitude & Farewell



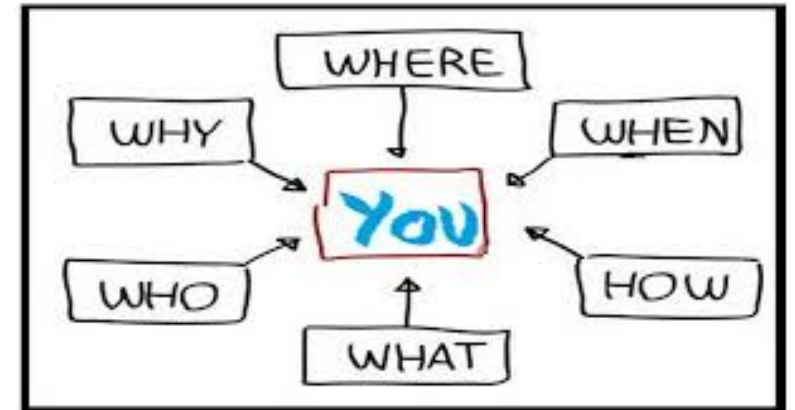
# Goals & Take Aways

- Understand Endowment Status at Your Org Today
- Connect Keys to Major Gifts Success to Endowment Giving
- “Make the Case” for Endowment Giving Now
- Develop Prospect Profile
- Action Steps to Advance Endowment
- Motivation to Start or Re-start the Endowment Conversation
- Share with & Learn from Peers
- Have Fun?



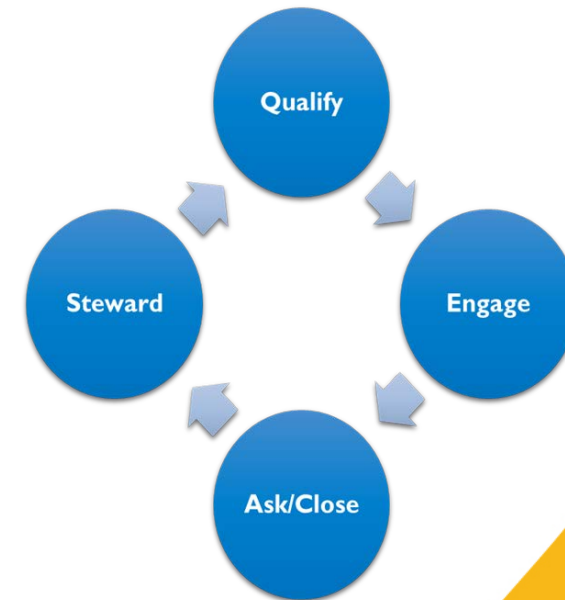
# Context Matters

- You, Your Org & Team
- Current Endowment Status: Size, Sources, Uses
- Visions, Goals & Strategy
- Biggest Challenge
- One Question/Idea



# Keys to Major Gifts Success

- MG Team
- Qualified Donor Prospects
- Compelling Case for Giving
- High Impact Engagement (f.k.a. “Cultivation”)
- Motivating Donor Offers - “The Ask”
- Meaningful Stewardship
- Individualized Strategies
- Commitment to a Plan
- Attentive Data Management



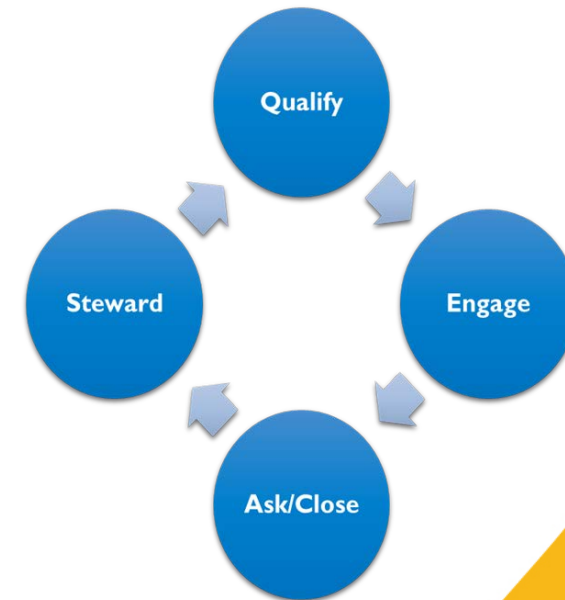
# Recurring Major Gifts Themes

- Relationships over Transactions
- Start with WHY
- Not About Zeroes and Commas
- It's a Team Sport - You're Playing the Long Game
- Beware Assumptions & Expectations
- Culture Matters
- People Want to Say, "YES!"
- Every Conversation is a Win
- Leverage Unique Advantages of Your Jewish Organization
- Make a Plan - Work the Plan – Revise the Plan
- **YOU** can do this!!!



# Keys to Major Gifts Success

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# The Case(s?) for Endowment

WHY?



A close-up photograph of a middle-aged man with short grey hair and round glasses, smiling warmly. He is wearing a light blue button-down shirt. The background is dark and out of focus, showing other people in a dimly lit room.

## **A fabulous "case for support" answers a donor's most basic question:**

"Why should I give YOU my hard-earned money?"

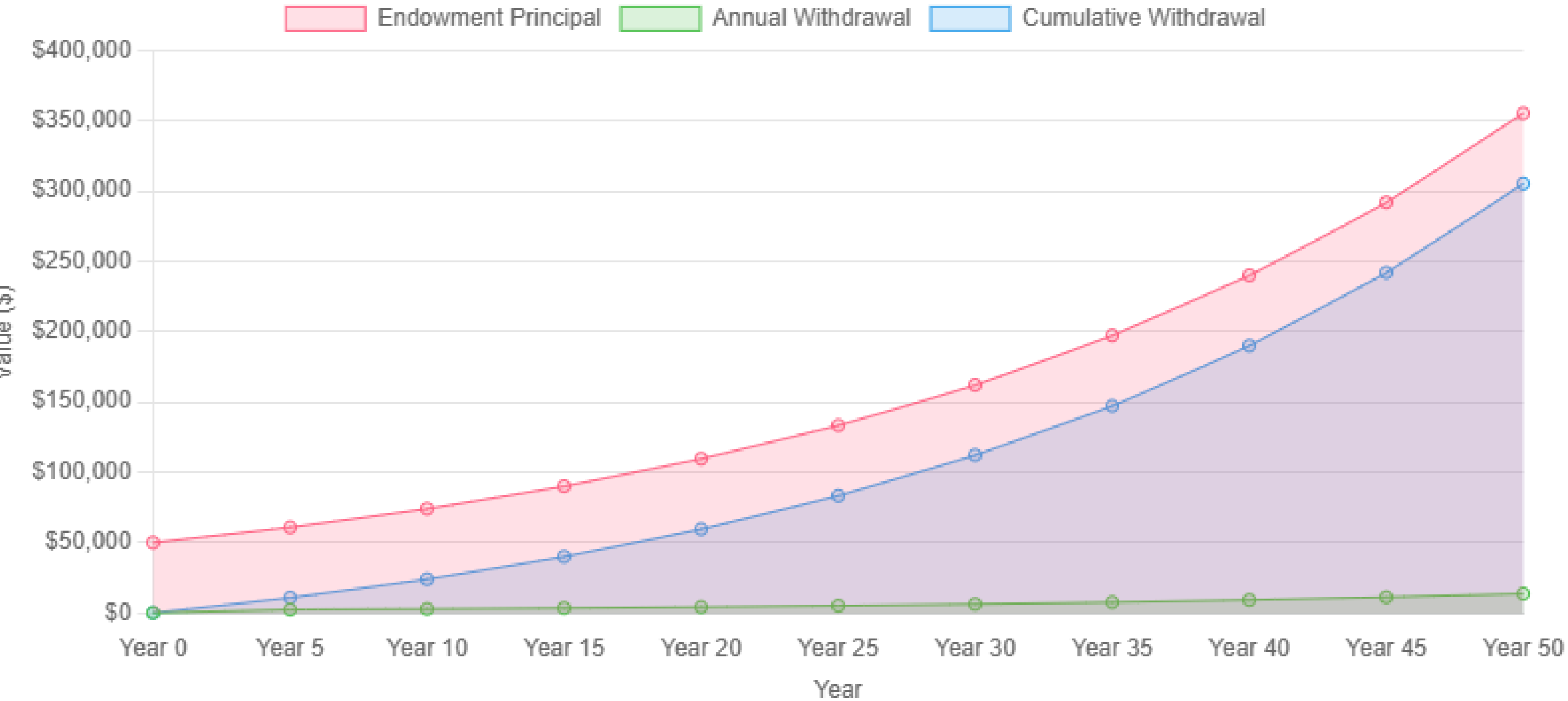
[\*\*Register for Tom's Case-Writing Webinar Here\*\*](#)



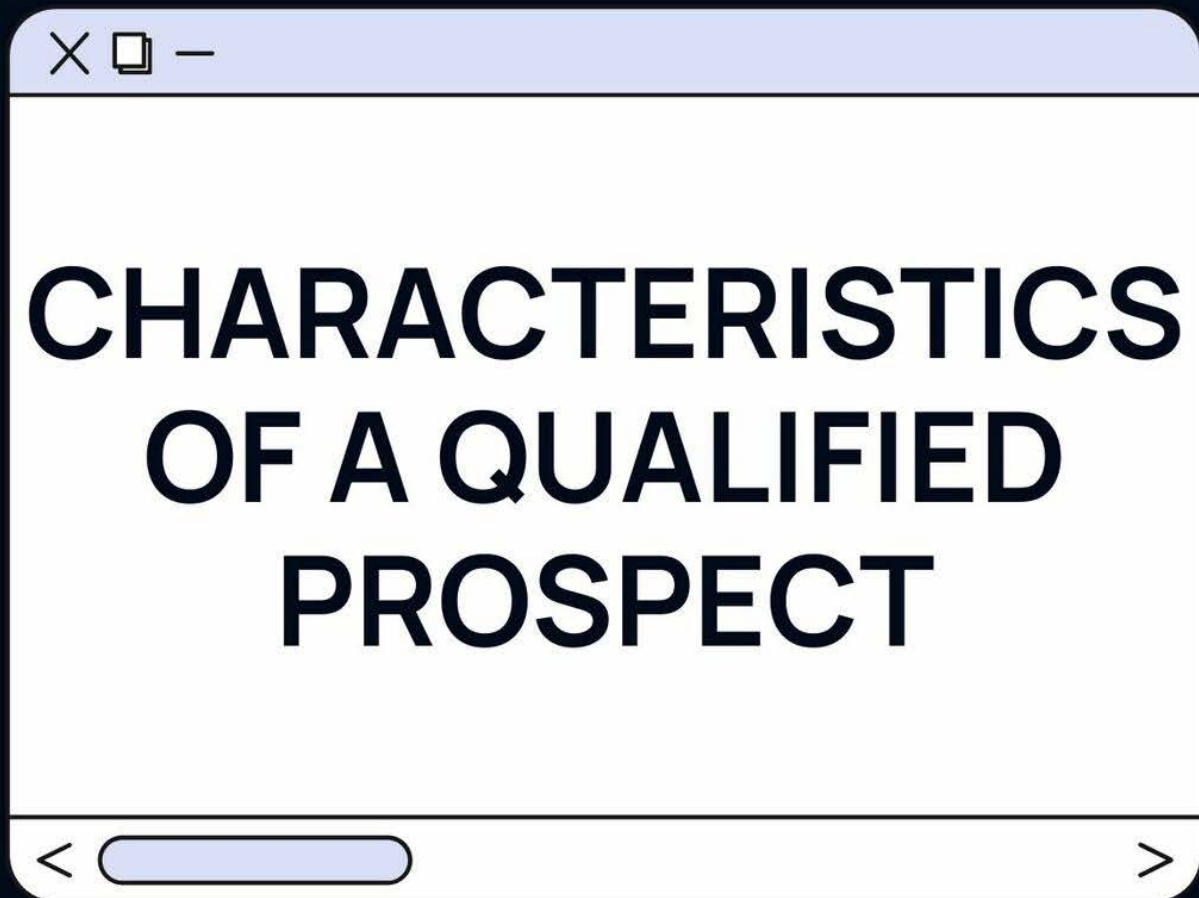
## Why Major Donors Give

- Give Back or Repay
- Experience a Spiritual Feeling
- Build a Sense of Community
- Right Wrongs – Fight Injustice
- Personal Experience of Org & Mission
- Heal Their Pain
- Honor or Memorialize
- Family Tradition
- Permanent Legacy – Symbolic Immortality
- Embellish Public Image
- Feel That They Are a Good Person

# Endowment Growth Chart



# “Qualified” Prospect Profile





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# Asking Options & Strategies

- Outright END Gift/Pledge
- Outright Integrated Gift/Pledge
- “Flexible Endowment”
- Endowment Campaign
- Capital Campaign with Endowment Component
- Match Campaign
- Mini Campaign



# Discussion & What Nexting

so  
what?  
now!



# Next Steps?

- Engage Leadership to Determine Endowment Priority
- Create/Refresh Related Policies
- Develop Vision & Strategy Plan
- Enroll Teammates: Staff, Board, Fin/Dev/Legacy Committees
- Co-develop Case for Endowment Now
- Develop Prospect Profile, ID & Strategies
- Ask





# Thank you!

**2025**

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