

JEWISH COMMUNITY FOUNDATION OF ORANGE COUNTY

LIFE & LEGACY FAQs

What is Life & Legacy?

- A capacity building partnership program offered by the Jewish Community Foundation and the Harold Grinspoon Foundation that provides training, support and monetary incentives to move organizations to secure meaningful after-lifetime legacy gifts.
- This program creates a strong partnership between the Jewish Community Foundation and our local Jewish community agencies, synagogues and day schools.
- Through Life & Legacy, participating organizations will embark on a legacy building program benefiting the entire Jewish community.

What are the benefits of participating in Life & Legacy?

- A comprehensive educational curriculum with topics including speaking with donors, marketing, stewardship and best practices.
- Incentive grants.
- Marketing assistance.
- An annual Endowment Book of Life signing event hosted by the Foundation for your organization's committed donors.

What are the basic requirements for applying for participation in the program?

- The ability to put together a legacy team made up of both senior professional(s) and lay leaders who will be responsible for:
 - Securing after-lifetime gifts for your institution;
 - Attending 6 training sessions per year;
 - Submitting excel-based reports in a timely manner on a quarterly basis;
 - Meeting the goals outlined in your legacy plan;
 - Establish board-approved written endowment policies and procedures; and
 - Place all bequests and other planned gifts received through this program at the Jewish Community Foundation in funds to be held for the benefit of your organization.

What are the obligations of the Jewish Community Foundation?

- Implement the program locally in partnership with the Harold Grinspoon Foundation with selected participating organizations.
- Offer an incentive grant to each local organization of up \$9,000 each year of the two-year program, payable upon the agency's accomplishment of defined, measurable goals.
- Offer quality group training seminars.
- Assist each agency to develop a plan, implement action and track progress.
- Provide consulting and coaching services.
- Provide legacy marketing for the region and templates for individual agency's public relations material.
- Recognize and thank all Life & Legacy donors, with donor approval, on behalf of the Orange County Jewish community.
- Host an annual Endowment Book of Life signing event to honor donors committed to endowing their gift.

How will you decide who can participate in Life & Legacy?

- At the meeting on May 29, 2013, the Jewish Community Foundation will distribute application forms.
- Once the forms are returned, a committee will review the applications to determine which 10-12 local organizations will be selected for the first two-year phase of Life & Legacy.
- The selected organizations will be notified of their acceptance into the program in July.

If ten organizations all begin seeking legacy gifts at the same time, won't we be in competition with each other to reach donors first?

- The program is designed to eliminate competition between agencies, and is intended to result in the creation of after-lifetime gifts that benefit the entire Jewish community.
- Incentive grants are not based on who reaches a particular donor first; but rather, whether a particular donor commits to leaving an endowed gift for your organization.
- Donors are sophisticated, and they generally leave legacy gifts to the organizations closest to their heart, regardless of which organization speaks with them first.
- Most donors leave bequest gifts to more than one congregation or organization. By speaking with a significant number of individuals, we raise the total level of legacy giving in our community.