



December 19, 2014

Ms. Dory Zatuchni
Chief Executive Officer
Jewish Family Services
101 Garden of Eden Road
Wilmington, DE 19803

Dear Dory:

We are pleased to inform you that Jewish Family Services of Delaware *Current Partner Incentive Application* has been conditionally approved, subject to the *Recommendation* attached to this letter, and your partnership continued in the Create a Jewish Legacy Program of Delaware, a collaborative initiative among the Jewish Federation of Delaware, Jewish Fund for the Future, local Jewish agencies, synagogues and day school, and LIFE & LEGACY™, a program of the Harold Grinspoon Foundation.

By continuing this partnership, you are deepening your commitment to a strong and vibrant strong and vibrant Jewish community for generations to come. We view this as a partnership in which we hold each other mutually accountable. The attached *Program Agreement*, to be signed by your organization's President and Executive Director, and each member of the Jewish Family Services of Delaware Legacy Team, describes the responsibility and expectations for each partner. Your acceptance package also includes *Recommendations and Confirmations*- vital information to strengthen your Legacy program, the *Create A Jewish Calendar* and *Legacy Contact Sheet*. Please return signed the *Program Agreement, Recommendations and Confirmations* and *Legacy Contact Sheet*, with this signed award letter, no later than **Wednesday, January 7, 2015.**

Together the Jewish Federation of Delaware and LIFE & LEGACY will offer Jewish Family Services of Delaware consultation and training services as well as an incentive grant of up to \$20,000 over a two year period. Each incentive grant is contingent upon reaching specific milestones set forth by the Jewish Federation of Delaware and mutually agreed upon by your signed *Program Agreement*. Additionally, it is required that all legacy gifts resulting from this program will be used to establish permanently endowed (no access to principal) funds at Jewish Fund for the Future, the endowment arm of Jewish Federation of Delaware, for the benefit of your organization.

Please mark your calendar for the first training event, "Writing Your Create a Jewish Legacy Action Plan," to be held on **Tuesday, January 13, 2015 from 5:30 p.m. -8:00 p.m. in the Siegel JCC Boardroom.** A kosher dinner will be provided. It will be our first opportunity to meet as a group of local legacy teams.

Finally, Andrea Bock will be continuing as the Create a Jewish Legacy Program Manager. She will be your primary contact for this program. If you have any questions, please contact her at (302) 427-2100 or Andrea@shalomdel.org.

Congratulations on your acceptance and continued partnership in the Create a Jewish Legacy Program. We look forward to our inspired work together.

Sincerely,



Richard A. Levine, Esq.
Chair, Create a Jewish Legacy



Seth J. Katzen
C.E.O., Jewish Federation of Delaware



If this letter and the attached documents correctly set forth your understanding of the terms this program, please indicate Jewish Family Services of Delaware's agreement to such terms by having an appropriate representative of your organization countersign a copy of this letter and return it to Andrea Bock, Create a Jewish Legacy Program Manager at Jewish Federation of Delaware.

By countersigning this letter, your organization confirms that there has been no change in its qualification as an organization exempt from income taxation pursuant to Sections 501(c)3 and 509(a)(1) or (2) of the Internal Revenue Service Code. The Jewish Federation of Delaware reserves the right to terminate this agreement at any time, for any reason at its sole discretion.

ACCEPTED AND AGREED:

By: _____

Title: _____

Date: ___/___/_____

Please sign and return this original letter to:

Jewish Fund for the Future
Attn: Andrea M. Bock
101 Garden of Eden Road
Wilmington, Delaware 19803



Create a Jewish Legacy Program of Delaware *Program Agreement*

Jewish Family Services of Delaware and Create a Jewish Legacy Program of Delaware shall:

- Treat each other and donors with the utmost respect.
- Be timely and responsive to communication and information requests.
- Consider the well-being and interests of the donors first.
- Be confidential and not participate in *Lashon Hora* (evil speech).
- Be good listeners, responsive and inclusive.
- Recognize the importance of *Ahavat Isreal* (the love of the Jewish community) and strive for the betterment of the entire community.
- Commit to the 2-year program together.

Jewish Family Services of Delaware shall:

- Maintain a minimum of 4 team members throughout the 2-year program.
 - Legacy Team Officer (1-2 lay leader), Legacy Team Delegate (1 person), Legacy Champion: Senior/Executive staff (1 person), Legacy Champion (1 or more person)
- Ensure that each team member:
 - Attend all group and individual training sessions. Large group sessions expected to be 4-6 per year.
 - Individual sessions will be scheduled as needed. One-on-one consulting with LIFE & LEGACY Program Officer, Dena Morris Kaufman, will be scheduled during times around the large group sessions. See *Create a Jewish Calendar* for more information
 - Have at least one legacy conversation a month
 - Have already created an endowment or made a legacy commitment by signing a Declaration of Intent, no later than January 7, 2015. See *Recommendations and Commitments* for more information
- The Legacy Team Officer will serve on and attend all Create a Jewish Legacy Cabinet meetings (4 a year)
- Develop a Create a Jewish Legacy Action Plan including goals, identification of prospects, and timeline for solicitations, recognition and stewardship.
- Place all bequests and other planned gifts received through this program as *Legacy Funds* to be held by the Jewish Fund for the Future. An unrestricted *Legacy Fund* for each partner organization has been established and named as the, “[Organization] Legacy Fund.”
- Encourage the creation of a permanently endowed legacy fund(s) which distributes up to 5% a year.
- Conform with reporting requirements (submitting names/ amounts of legacy conversations and pledges).



Create a Jewish Legacy Program of Delaware

Program Agreement

FINAL

Jewish Family Services of Delaware (cont.):

- Seek permission from all legacy donors for receiving communication and public recognition.
- Establish board-approved written endowment policies and procedures.
- Incorporate the Create a Jewish Legacy logo and messaging in to the overall culture of the organization and marketing presences.
- Receive incentive grant of up to \$20,000 contingent upon reaching specific milestones:

Year 1

- \$7,500- 18 Signed Declaration of Intent
- \$10,000- 25 Signed Declaration of Intent
- 26+ Signed Declaration of Intent count towards year 2 milestones

Year 2

- \$7,500- 18 Signed Declaration of Intent
- \$10,000- 25 Signed Declaration of Intent

Create a Jewish Legacy Program of Delaware shall:

- Develop the program and curriculum.
- Offer two incentive grants of up to \$10,000 each year, payable upon the organization's accomplishment of defined, measurable goals listed in the this agreement.
- Offer high quality group and individual training seminars- 4 to 6 a year.
- Schedule, maintain and support the Create a Jewish Legacy Cabinet meetings- 4 a year.
- Create and maintain communication systems among all organization partners.
- Guide each organization to develop and implement an action plan and track progress.
- Provide a community-wide Create a Jewish Legacy logo and website.
- Provide consulting and coaching services.
- Identify potential donors that appear on multiple organizations' prospect lists and coordinate the conversations (cross donor identification and management process).



Create a Jewish Legacy Program of Delaware *Program Agreement*

FINAL

Create a Jewish Legacy Program of Delaware shall (cont.):

- Provide legacy marketing for the partners and templates for the individual organization’s public relations material.
- Use donor names, with donor approval, for communication to recognize and stewardship.
- Coordinate, plan and implement community-wide Create a Jewish Legacy events.

JFS of Delaware, *President*

Date: ___/___/_____

Create a Jewish Legacy Program Manager

Date: ___/___/_____

JFS of Delaware, *Executive Director*

Date: ___/___/_____

C.E.O., Jewish Federation of Delaware

Date: ___/___/_____

JFS of Delaware, *Legacy Team Officer (chair)*

Date: ___/___/_____

Please sign and return to:



Jewish Fund for the Future
Attn: Andrea M. Bock
101 Garden of Eden Road
Wilmington, Delaware 19803

Create a Jewish Legacy Program of Delaware

Recommendations and Confirmations

FINAL

Recommendations:

The Create a Jewish Legacy program is committed to ensuring the sustainability of Delaware's Jewish future through legacy giving. Subject to the guidelines of the Create a Jewish Legacy program, it is the recommendation of the Advisory Committee to approve Jewish Family Service's application, subject to the requirement, that the organization add one (1) or more individuals to their Legacy Team. To ensure the success of the Jewish Family Services of Delaware's Create a Jewish Legacy program, we suggest that you consider active community members who have served on your board 20+ years ago and/or leadership with a long standing relationship.

Please submit the name(s) of the team member(s), with your signed acceptance packet, by the submission deadline: Wednesday, January 7, 2015. If you have any questions, please contact Andrea Bock, Create a Jewish Legacy Program Manager, at (302) 427-2100 or via e-mail at Andrea@shalomdel.org.

Confirmations:

As stated it was stated in the application and is referenced again in the *Program Agreement* section of this packet, all Legacy Team members are required to have either created an endowment or made a legacy commitment by signing a Declaration of Intent.

Based on our records, we do not have a record of an endowment or a copy of signed Declaration of Intent from the following people:

Valerie Middlebrooks

Blank Declarations of Intent have been included in your acceptance packet. Please have the individuals complete the form(s) and return with the signed acceptance packet, no later than, Wednesday, January 7, 2015. If a Legacy Team member has any questions and/or is not able to submit by the deadline, have the individual contact Andrea Bock

By signing this page, the undersigned acknowledges the information provided on this page of the acceptance packet. If necessary, the organization agrees to contact Andrea Bock, Create a Jewish Legacy Program Manager, before December 31, 2014 to discuss the *Recommendations and Confirmations* page.

ACCEPTED AND AGREED:

By: _____

Title: _____

Date: ___/___/_____



Please sign and return to:

Jewish Fund for the Future
Attn: Andrea M. Bock
101 Garden of Eden Road
Wilmington, Delaware 19803

Create a Jewish Legacy Program of Delaware
Program Calendar

FINAL

Tuesday, January 13, 2015	Individual team consulting with Dena Morris Kaufman 9:00 a.m. - 4:00 p.m., JFD Boardroom* <i>*See Legacy Contact Sheet for more information</i>
	“Writing Your Create A Jewish Legacy Action Plan” 5:30 p.m. -8:00 p.m., Siegel JCC Boardroom
Wednesday, January 14, 2015	Team consulting with Dena Morris Kaufman 8:30 a.m. – 10:30 a.m.. JFD Boardroom* <i>*See Legacy Contact Sheet for more information</i>
Friday, February 6, 2015	Legacy Action Plans Due
Wednesday, February 18, 2015	“Conversation” training 8:00 a.m. - 11:00 a.m., Location TBD
	Individual team consultation to go over Action Plans Times and location TBD
Thursday, February 19, 2015	Individual team consultation to go over Action Plans Times and location TBD
Tuesday, May 12, 2015	“Marketing” training Times and location TBD
Tuesday, June 30, 2015	1 st quarter reports due to CJL manager
September, 2015	“Stewardship” training Times and location TBD
	Mid-year team consultations Times and location TBD
Wednesday, September 30, 2015	2 nd quarter reports due to CJL manager
Wednesday, December 30, 2015	3 rd quarter reports due to CJL manager
Sunday, February 28, 2016	Close of Year 1
Wednesday, March 30, 2016	4 th quarter reports due to CJL manager
May, 2016	Celebration of donors



Create a Jewish Legacy Program of Delaware
Cabinet Calendar

FINAL

Tuesday, June 30, 2015

1st quarter reports due to CJL manager

Cabinet Meetings- Legacy Officers only
Times and location TBD

Wednesday, September 30, 2015

2nd quarter reports due to CJL manager

Cabinet Meetings- Legacy Officers only
Times and location TBD

Wednesday, December 30, 2015

3rd quarter reports due to CJL manager

Cabinet Meetings- Legacy Officers only
Times and location TBD

Wednesday, March 30, 2016

4th quarter reports due to CJL manager

Cabinet Meetings- Legacy Officers only
Times and location TBD



Create a Jewish Legacy Program of Delaware
Legacy Contact Sheet

FINAL

Organization: *Jewish Family Services of Delaware*

Legacy Email: _____ Legacy Phone: _____
(Example: legacy@organization.org or YourJewishLegacy@organization.org)

Organizations Website: _____

Does your organizations website have a section for Legacy giving? YES NO

If yes, please provide the direct link: _____

Organization Mission Statement: _____



Create a Jewish Legacy Program of Delaware
Legacy Contact Sheet

Use additional sheets if necessary.

1. Legacy Team Officer

Name: _____

Email: _____ Phone: _____

Best Time of Day for Meetings: Morning Afternoon Evening After 6:30 p.m.
(circle one)

Calendar conflicts: _____

2. Legacy Team Delegate

Name: _____

Email: _____ Phone: _____

Best Time of Day for Meetings: Morning Afternoon Evening After 6:30 p.m.
(circle one)

Calendar conflicts: _____

3. Legacy Champion: Senior/ executive staff

Name: _____

Email: _____ Phone: _____

Best Time of Day for Meetings: Morning Afternoon Evening After 6:30 p.m.
(circle one)

Calendar conflicts: _____

Create a Jewish Legacy Program of Delaware
Legacy Contact Sheet

FINAL

Use additional sheets if necessary.

4. Legacy Champion

Name: _____

Email: _____ Phone: _____

Best Time of Day for Meetings: Morning Afternoon Evening After 6:30 p.m.
(circle one)

Calendar conflicts: _____

5. Legacy Champion

Name: _____

Email: _____ Phone: _____

Best Time of Day for Meetings: Morning Afternoon Evening After 6:30 p.m.
(circle one)

Calendar conflicts: _____



Please complete and return to:

Jewish Fund for the Future
Attn: Andrea M. Bock
101 Garden of Eden Road
Wilmington, Delaware 19803

Create a Jewish Legacy Program of Delaware

FINAL

*Individual team consulting session with Dena Morris Kaufman,
LIFE & LEGACY Program Officer*

Please write 1st, 2nd and 3rd next to the times the Legacy Team is available.

Tuesday, January 13, 2015

___ 9:00 a.m. - 10:00 a.m.

___ 10:15 a.m. - 11:15 a.m.

___ 11:30 a.m. - 12:30 p.m.

___ 2:00 p.m. - 3:00 p.m.

___ 3:15 p.m. - 4:15 p.m.

Wednesday, January 14, 2015

___ 8:30 a.m. - 9:30 a.m.

___ 9:45 a.m. - 10:45 a.m.

It is encouraged that this page is submitted as soon as possible. Your session time is first come, first serve. The Legacy Team Officer will be notified of your organizations scheduled time within one (1) business day of receiving the team's availability. Organizations may electronically submit the teams' availability for the *Individual Team Consulting Session with Dena Morris Kaufman, via email to Andrea@shalomdel.org.*

REMINDER:

“Writing Your Create A Jewish Legacy Action Plan”

Tuesday, January 13, 2015

5:30 p.m. – 8:00 p.m.

Siegel JCC Boardroom

5:30 p.m. - Kosher dinner

6:00 p.m. - Presentation



Please complete and return to:

Jewish Fund for the Future
Attn: Andrea M. Bock
101 Garden of Eden Road
Wilmington, Delaware 19803

Creating Legacies TODAY, TOMORROW and TOGETHER

101 Garden of Eden Road · Wilmington, DE 19803 · (PH) 302-427-2100 · JewishLegacy@shalomdel.org

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Please provide the additional information:

- Electronic file of all current board members in excel format
- Electronic file of your organizations full color, high resolution (300 dpi or higher) logo
- Brochure, letterhead, fundraising and any other marketing material copies from 2013/2014 and 2014/2015. Be sure to include publications and other advertising mediums.

Submit your electronic files to Andrea@shalomdel.org

Please return your organizations signed *Acceptance Letter*, signed *Program Agreement*, signed *Recommendations and Confirmations* document and completed *Legacy Contact Sheet*, **no later than Wednesday, January 7, 2015.**

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101 Garden of Eden Road
Wilmington, Delaware 19803

