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Legacy Building is Community Building

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By Shep Englander

When I was hired as CEO of the Jewish Federation of Cincinnati eleven years ago, no goal was more important than building trust and collaboration across our community. We have employed a myriad of strategies in support of that goal, from shared professional development courses to community-wide strategic plans.

So I was surprised when I realized that our new [Create Your Jewish Legacy](#) (CYJL) program, with its goal of making our Jewish community more financially sustainable, turned out to be one of the most effective strategies we have found to transform a community with silos into a more connected and collaborative one.



I was at our fifth CYJL seminar, watching representatives of different synagogues and agencies schmooze over coffee and bagels. They had started this CYJL training course as separate – even competing – teams, each representing one organization. But as they all succeeded in securing legacy commitments, which often benefited several organizations, these community leaders began to feel and act as one team working toward a common goal.

It was striking to hear participants congratulate one another on legacy commitments secured for other organizations. Previously, lay leaders who volunteered with different organizations often felt conflicted – contributing to one organization meant forsaking another. Now they found themselves representing and helping all the Jewish organizations they cared about at the same time.

This transformation succeeded largely because of the strategy we used to head off potential conflicts between participating organizations. We asked them to submit their legacy donor prospect lists to the Federation's CYJL professionals, who confidentially compared the lists. These professionals then worked with the teams to develop a coordinated strategy as to who should approach each prospect. That strategy was shaped by what would be best for the donor and also best for the community as a whole.

Sharing sensitive information about a prospective donor with the Federation and with other organizations, and even allowing a different organization to take the lead with a certain donor, was revolutionary. It replaced a culture of organizational competition with one of coordination and mutual trust. Best of all, it worked. Our CYJL community of 12 organizations has achieved double its goals as of January, the end of its first year, securing over 460 new commitments for the community.

The design of the CYJL program, which we adopted and ran in partnership with the Harold Grinspoon Foundation's [LIFE & LEGACY](#) program, was serious, high-quality, and nationally tested. It provided incentives to the agencies for

staying on track and implementing their CYJL plans. Our CYJL manager, David Harris, made this work a personal calling. He and his colleagues developed a personal vision of community success and expressed it at every CYJL seminar and in hundreds of coaching conversations with sincerity and passion.

Finally, the Federation made a difficult decision not to field our own team because we wanted to ensure that other organizations did not see us as a competing agency with interest in poaching their prospects. At the opening CYJL orientation meeting, I said to the group, "If not a single penny enters Federation's coffers as a result of this program, CYJL will still be a success."

And I meant it. But the fact is, the Jewish Federation of Cincinnati has benefited in some big ways. We now have 45 new legacy commitments, half of which resulted from a conversation that someone from one of the participating organizations initiated. But mostly, having all these volunteers and professionals work together builds relationships for our future. It helps leaders from different organizations get to know each other's missions. It helps develop leaders within organizations and within the community.

A successful legacy campaign asks all of us to talk about the community we want to see in the future – the community we want our great-grandchildren to inherit. Our legacy program has also inspired our community's leaders and donors to develop a sense of mutual responsibility for that future, where securing legacy commitments is not a zero-sum game, but a win for the whole community. And that is community building at its finest.



Cincinnati team members participating in the Create Your Jewish Legacy Program

Shep Englander is CEO of the Jewish Federation of Cincinnati.