

BH

Chabad Lubavitch of Rochester

Case Statement

Chabad – a dynamic, vibrant catalyst for Jewish unity and renewal that serves as a universal open door to Judaism.

Established in 1981 at the behest of the Rebbe, Chabad exemplifies *Ahavat Yisrael*, unconditional non-judgmental love that embraces all Jews regardless of background, affiliation or non-affiliation. Chabad reaches out with heart and soul to our Jewish brothers and sisters of all ages to foster the appreciation of the beauty of our heritage. From the wide-eyed children who are excited and stimulated by our hands-on Model Matzah Bakery to the hospital patients and nursing home residents who are remembered and touched by our Shabbat flower visits – the entire spectrum of the Rochester Jewish community is enriched by Chabad.

By means of a rare combination that blends traditional Jewish teachings & values with modern and innovative techniques, we provide a meaningful Jewish experience that is both intellectually and emotionally stimulating and satisfying. Chabad rekindles and invigorates that special holy spark that lies within every single Jew to reinforce the bond of identification with, and love for, G-d, Torah and Israel.

Our legacy donors are people like you who want to ensure that Chabad will be able to continue to reach out to the entire community to strengthen Jewish identity and unity into the next generation and beyond.

Your legacy gift will help us continue to successfully transmit the sacred heritage of yesterday to the Jew of today, thereby ensuring a Jewish tomorrow. *Lechaim!*

Management Plan

The Legacy Team members are Brian Blaustein, Dennis Kessler, Richard Kroll and Rabbi Nechemia Vogel.

- Rabbi Vogel will be responsible for the management plan, lead the team in making sure the plan gets implemented as laid out and will liaison with the board. Brian Blaustein will be responsible for tracking gifts, updating documents & records, and the submission of quarterly reports and other required documentation.
- Conversations with donors, stewardship and relationship building will be handled by all team members. Dennis Kessler will coordinate the marketing of the program.
 - Rabbi Vogel will schedule the initial meetings and coordinate with team members. He will also schedule the donor events.
 - In addition to Rabbi Vogel, one of the other team members will call every new donor.
 - Rabbi Vogel's office will send the thank you letters.
 - Richard Kroll will coordinate with the donors' estate planning professionals, such as attorneys and financial planners.
 - As an insurance and investment planner, Brian Blaustein will offer his expertise in planned giving.

Target Prospects

- Advisory Board Members
- Annual campaign donors
- Long time mail solicitation donors
- Participants and beneficiaries of Chabad programs, classes and services
- Camp Gan Izzy families, past and present

Marketing Plan

- The Legacy program will be marketed in a variety of ways:
 - Weekly e-Newsletter
 - Mini website: www.chabadrochester.com/plannedgiving

- Announcements on our website
- Email blast
- Facebook page
- The Chabad Times (mailed to the entire Jewish community)
- The Jewish Art Calendar (mailed to the entire Jewish community)
- Posters in lobby
- Inserts in regular thank you letters

Communication and messaging vehicles will be cycled to avoid “bombarding”. We will send out initial and follow-up emails in our e-Newsletter with links to our planned giving website.

- A Legacy opportunity statement will be added to Chabad literature.
- Legacy donors will be asked to provide testimonials (and, if necessary, will be assisted in the writing of the testimonial) about their participation. Some of the testimonials may be videotaped. These testimonials will be made available to the larger community via the website and other marketing media.

Stewardship and Recognition of Legacy Donors

- Legacy team members will make a personal phone call to the donors immediately upon receipt of a Letter of Intent.
- Personal notes thanking the donors for their Legacy commitment will be sent within three days of receipt.
- Shmurah Matzah for Passover and honey cake for Rosh Hashanah - with a personal note - will be delivered to donors’ homes.
- New Legacy donors will be listed (with permission) in The Chabad Times and Jewish Art Calendar.
- We will send an Annual Legacy Report to update our Legacy donors on the progress of the past year.
- We will share testimonials from our Legacy donors with the greater community.
- Donors will be recognized at Chabad dinners and events.

Setting Goals

<u>Year 1</u>	<u># of Legacy gifts</u>
Legacy team members	3
Major Donors – one-on-one conversations	6
Class / program attendees	4
Long time donors	<u>5</u>
Total anticipated gifts in Year 1:	18

<u>Year 2</u>	<u># of Legacy gifts</u>
Major Donors – one-on-one conversations	8
Class / program attendees	5
Long time donors	<u>5</u>

Train **2** new solicitors to join the Legacy Team

Total anticipated gifts in Year 2: **18**

Total Legacy Gifts: **36**

Implementation Strategy

2018 – First Quarter

- Schedule meetings with at least five of Chabad Center’s donors and class / program attendees for personal, one-on-one education and solicitation sessions. The goal is one per month per team member.
- Update our website to include information on the Legacy Program with contact information for the Legacy Team.
- Include Legacy button in weekly email newsletter.
- Ads in the Purim and Pesach editions of The Chabad Times.
- Shmurah Matzah to donors.

2018 – Second Quarter

- Schedule meetings with at least five of Chabad Center’s donors and class / program attendees for personal, one-on-one education and solicitation sessions. The goal is one per month per team member.

- Ad in the Shavuot edition of The Chabad Times.
- Legacy Workshop – May 23.

2018 – Third Quarter

- Schedule meetings with at least five of Chabad Center's donors and class / program attendees for personal, one-on-one education and solicitation sessions. The goal is one per month per team member.
- Ad in The Chabad Jewish Art Calendar.
- Honey Cake to donors.
- Sukkah Party for donors.
- Invite new members to join the Legacy Team and begin their training.

2018 – Fourth Quarter

- Schedule meetings with at least five of Chabad Center's donors and class / program attendees for personal, one-on-one education and solicitation sessions. The goal is one per month per team member.
- Ad in the Chanukah edition of The Chabad Times.
- Legacy Workshop – November 14.
- Chanukah Party for donors.