



Legacy Plan

CASE Statement

The Epstein School cultivates lifelong skills, inspires Jewish identity, and nurtures curiosity, critical thinking and creativity. Our students experience an exceptional education led by specialized STEAM and Hebrew language programs that give them skills for the future and our rapidly-changing world.

Centered on our Jewish values – Lilmod u’Lelamed (learning and teaching), Simcha (joy), Elu v’Elu (multiple perspectives), Kehillah (community: Epstein, Atlanta, Israel), Kavod (respect), and B’tselem Elohim (each person contains a holy spark) – we prepare confident lifelong learners grounded in their unique Jewish identities.

We continuously invest in our students, professionals, and program. Our graduates are:

- Advocates for themselves and their learning.
- Critical thinkers who can see the world through multiple perspectives.
- Capable Hebrew speakers enabling strong connections with Israel and Jews around the world.
- Confident and committed leaders who are grounded in their own Jewish identity.
- Expressive and articulate communicators whether written, spoken, or other media.
- Mathematicians and scientists who see patterns in the world and can solve problems.
- Lifelong learners who can manage time, adapt to change, plan ahead, and deepen understanding through research and interpersonal skills

The Epstein School is focused on building 21st Century learning and skills, infusing Hebrew language, cultivating Jewish identity, and developing students’ passions.

Your legacy gift will impact future generations of Epstein students. Please join us today

Management Strategy

- Legacy Team: Ronette Throne, Dr. David Abusch-Magder, Brian Granath, Coleen Lou, Lori Miller, Tali Benjamin, Becky Wise
- All members are responsible for conversations and thanking prospects based on their assignments.
- Ronette Throne: implementation and keeping team on track, stewardship program, submitting reports
- Coleen Lou and Tali Benjamin: Marketing and Communications
- Brian Granath and Dr. David Abusch-Magder: Board communication
- Lori Miller: Integration of legacy with Epstein Fund
- Becky Wise: Tracking of gifts, documents and records. Support for quarterly reports

Target Audience

- Legacy Team
- Current Board Members
- Past Board Members
- Past Presidents
- “Alumni Wall” grandparents
- Grandparents
- Parents
- Alumni Parents
- Broader community supporters 10+years (years 3 and 4)

Marketing

- Current Opportunities to incorporate legacy
 - E-keshet magazine
 - Website
 - Tagline to website, emails and other print materials
 - Social media
 - Epstein fund materials
 - Back to School night packets
- Areas to Explore
 - Brochure
 - Video – how to, testimonial, etc.
 - Infographic on What is Endowment – educational piece
 - Recognition signage – screen vs. current recognition sign

Stewardship

- Develop a plan for yearly stewardship and check-ins which includes:
 - Handwritten notes or email follow up, depending on interaction, after all cultivation meetings.
 - Letter of intent confirmation - acknowledgement letter from Chair, Head of School or CAO within one week.
 - Thank you call from Chair, HoS or CAO– depending on who handled solicitation.
 - Legacy sticker on nametags at any events
 - Invitation to Major Gifts event (even if no Annual Fund commitment) – TBD
 - Legacy reception for appropriate events – TBD
 - If cash gift, yearly report on usage of funds/ For planned gifts, consider special printed piece.
 - Explore special recognition) for legacy society members
 - Hannukah or Rosh Hashana cards from CAO. Consider notes from kids. Thank you video or song to be further explored.

Goals

Year One	Goal	Stretch
Team Members	5	5
Current Board (24)	8	10
Past Board	3	4
Past Presidents	2	4
Total	18	25

Year Two	Goal	Stretch
Current Board (24)	7	10
Past Board	3	5
Past Presidents	4	5
Alumni Wall Grandparents	4	5
Total	18	25

Implementation

April – July 2018

- Finalize Legacy plan and confirm additional committee members
- Prioritize which board members are good legacy prospects.
- Assign prospects to team members. Team members meet one on one w/board members.
- Confirm legacy gifts from team members and Board members
- Review Top prospects and assign team member
- Finalize recognition plans, letters and stewardship plans
- Determine marketing strategy and budget for implementation
- Ensure presence in web content
- Ensure legacy language in all marketing materials and consider how to include in Epstein Fund letters.

August – November 2018

- Continue one on one conversations based on assignments
- Confirm legacy gifts from Board members
- Incorporate legacy in Major gifts event
- Determine what can be accomplished during blackout – September/October – schedule December and January meetings
- Include information in Back To School Night packets
- High Holiday cards for intents/confirmed
- Training for Epstein Fund Cabinet on including legacy ask as part of solicitations
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December 2018 – March 2019

- Consider incorporating Legacy in Milestone events – a speaker or information about Generation to Generation.

- Evaluate efforts to date and determine how to morph goals accordingly
- Notes for Hannukah to all intent/confirmed legacy donors
- Marketing effort around Hannukah theme
- Continue one on one solicitations focusing on board, past board and select past presidents
- Inaugurate recognition plaque in lobby – consider temporary option similar to Eagle Circle Display.