



Akiva's Life and Legacy Campaign

Case Statement

At Akiva we pursue excellence, foster critical thinking, and inspire informed Jewish living. As the only Jewish day school in Middle Tennessee, Akiva School ensures Jewish continuity by educating the next generation of knowledgeable and committed Jews. We are a welcoming, multi-denominational school, open to all children with at least one Jewish parent. By offering a Jewish day school education in Nashville, we help make our dynamic city an attractive relocation destination for all Jews.

Our curriculum integrates General and Jewish Studies. As part of our Jewish Studies program, students develop a love of Judaism and Israel through a Hebrew immersion approach to learning. Our General Studies focuses on STEAM (Science, Technology, Engineering, Art and Mathematics) and prepares them for future success in "life after Akiva." Our school educates the whole child - mind, body, and soul - and instills core Jewish values into the curriculum and daily activities. We integrate Jewish learning into the students' everyday lives, so that our graduates are passionate about learning, Hebrew, Israel and their Jewish identity. Akiva graduates are leaders in the Jewish community and the greater Nashville community, with a deep awareness of how to treat others and take deep pride in who they are.

Akiva families represent a broad and balanced spectrum of Jewish beliefs and practices, coming from secular, Reform, Conservative, Modern Orthodox, Chabad, and unaffiliated homes. With a generous scholarship program, we attract Jewish students from a wide range of socio-economic backgrounds.

Our students are creative and bright. They are eager to learn and possess impressive academic and social thinking skills; their curiosity and respect for self and others is inspiring. Most importantly though, they are enthusiastic learners and are not afraid to ask questions.

Our legacy society members are people like you who want to ensure that all Jewish children - regardless of denominational affiliation or non-affiliation and financial circumstance - have the opportunity to receive a Jewish education, and to enhance the Nashville Jewish community at large.

Akiva students are, by definition, our future. Please join us in ensuring that our future is vibrant, rich, and solid.



Management Plan

Life and Legacy Chair: Larry Hyatt

Responsibilities:

- Leading the team to ensuring the plan is professionally implemented
- Following up with committee members and providing assistance when needed
- Liaison to Board of Directors
- Give direction to staff members

Staff Member: Julie Fortune

Responsibilities:

- Tracking gifts
- Documenting and recording gifts in Donor Connect
- Submission of Life and Legacy quarterly reports to committee for review and making necessary changes to documents
- Thanking donors (handwritten thank you cards, tax letters, etc.)
- Executing task assigned by the Chairman

Stewardship Committee Members: Moises Paz (Chair) and Evan Nahmias

Responsibilities:

- Ensuring that donors are thanked and honored appropriately
- Soliciting and relationship building through Legacy Society (will pair with a staff member) including birthday cards, Rosh Hashanah cards, Purim Carnival invites, Grandparents Day/Special Friend Day invites
- Engaging with current donors including planning and implementing stewardship

Marketing Committee: Ben Doochin, Didi Biesman, and James Mackler

Responsibilities:

- Identify needs for website portal (i.e. what should be included, wording, etc.)
- Create and purchase signage for Legacy Society events and Akiva Life and Legacy Campaign
- Help identify additional potential donors
- Identify individuals for Akiva video



Conducting Legacy Conversations: Moshe Werthan (Chair), Daniella Pressner, Tony McLarty, Reva Heller, Didi Biesman

Responsibilities:

- Assists with stewardship and gratitude platforms

Target Audiences & Prospects

- Akiva's Boards of Directors
- Akiva's past Board of Directors
- List of targeted individuals (see page 7)
- Parents and grandparents
- Alumni
- Faculty and Administration

Marketing Plan and Implementation Strategy

- Utilize our current modes of communication to market Life and Legacy campaign, provide testimonials as to why Akiva is unique, and promote Legacy Society events and programs. Current modes of communication are:
 - Electronic bi-weekly newsletter
 - Website (working on updating this summer)
 - Social Media – Facebook
 - Programs – Purim, Grandparent/Special Friends Day Alumni reunions, etc.
 - Printed material (The Observer, Parent Magazine, etc.)
- Create portal on our webpage that will allow individuals to learn about our Life and Legacy Campaign and request an opportunity to learn more.
- Create signage for Akiva hosted events (Grandparents Day, Siddur Ceremony, etc.) where we can build awareness.
- Hold one-on-one conversations with individuals and ask if there are others to whom we should reach out.
- Create videos of Akiva Alumni, current students, and grandparents as to why Akiva is so special.



Stewardship

1. One annual Legacy Society Member event hosted at the home of a distinguished leader or donor in the community. A personal invitation from the host and host committee will be extended to each Legacy Member. Akiva School leadership will make a phone call to each Legacy Society Member encouraging their attendance and participation at the event. The phone call will also advise Legacy Society Members of recent “goings-on” at the school and express appreciation for their Legacy Gift. A “special” program on a topic of interest, along the lines of a ‘Scholar in Residence’ will be included in the program.
2. One school hosted event, held at Akiva School, coordinated with a Jewish Holiday and include performance by Akiva School Students. This will be an exclusive performance, of a normally scheduled program, presented at this Legacy Society Members only program. The program may be complemented by a nationally recognized educator addressing a topic of relevance to Day School Education and Akiva School. Programs may include: Sukkot program, Spring Tu’Bshevat, or a special Shabbat program.
3. Two mailings custom designed to engage Legacy Society Members. The mailing will be distributed at the end of each semester, professionally designed and written. This mailing will outline accomplishments of the school, recognize Legacy Society Members and provide information regarding the special Legacy Society Programs outlined above.
4. Recognition of Legacy Society Members in “Special Mailings” of the school, i.e. invitations to annual events, holiday greetings or other special promotional materials. Recognition will also be tastefully presented on the Akiva School web page and school social media. A Legacy Society Member’s recognition piece of art will be displayed in a prominent location at the school.
5. Ask legacy donors for testimonies and publicize the testimonies.

Goals

Year 1 Goal: 25 Signed Letters of Intent

<u>Year 1</u>	<u>Goal</u>	<u>Stretch</u>
Board Members	10	10
Past Board Members	1	3
Past Board Presidents	2	3
Life and Legacy Team	5	9
TOTAL:	18	25

<u>Year 2</u>	<u>Goal</u>	<u>Stretch</u>
Alumni	5	6
Current Parents	3	7
Current Grandparents	5	6
Private Conversations	5	6
TOTAL:	18	25

Goal Review:

Year 1 Goal: 18 Signed Letters of Intent

Year 2 Goal: 18 Signed Letters of Intent

Year 3 Goal: 18 Signed Letters of Intent

Year 4 Goal: 18 Signed Letters of Intent

Total Signed Letters of Intent: 90 Signed Letters of Intent by 2021

Calendar Checklist

March 2017

- Finalize and submit Life and Legacy Plan
- Present Life and Legacy Plan to Board

April 2017 – Fiscal Year Begins April 1, 2017

- Akiva Team Meeting with Life and Legacy to review Legacy Plan
- Session Two with Life and Legacy
- Newsletter goes out with preliminary information about Akiva’s Life and Legacy program
- Solicitations assignments

May 2017

- Finalize solicitation lists and assignments
- Create Legacy Society and calendar for events
- Incorporate Life and Legacy information and case statement on website and printed material

June – August 2017

- Begin Legacy conversations
- Work with Life and Legacy team to identify 12 major donors and who is the lead for each conversation
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September 2017

- Plan and schedule articles for printed material
- Send High Holy Day cards to potential donors

October 2017

- Begin to implement Legacy Society calendar
- Create Akiva video

November 2017

- Grandparents and Special Friends Day
- Legacy Society Thank You event
- Alumni Reunion



December 2017

- Review with Board on progress made with Life and Legacy

January - March 2018

- Complete Legacy conversations and solidify all outliers