

Case Statement

Over fifty years ago, a group of visionaries who believed that Jewish Day School education plays a critical role in ensuring Jewish continuity, communal involvement, advocacy and connection to Israel founded The Hebrew Academy of the Capital District. Today, we celebrate this nurturing and inclusive school community where we equally value Hebrew and English, Torah and math, derech erez and scholarship. We are a home, a family, and a community, welcoming a diverse population of Jewish families with warmth and spirit in our classrooms and beyond. Providing a Jewish day school education to children regardless of their family's ability to pay has always been one of our core values. Our presence attracts committed Jewish families to the Capital District, strengthening our local Jewish community and the community at large. Our current students and generations of alumni invigorate our Jewish organizations, making Hebrew Academy a cornerstone of local Jewish life.

Our students:

- Are sensitive, caring, and respectful human beings who go out into the larger world as knowledgeable, passionate, and principled citizens, well prepared to excel in the 21st century and beyond.
- Are aware of who they are as Jews, and have the tools to deepen their personal connections to Judaism.
- Are well grounded in Torah, Jewish history, Jewish law and traditions, and rabbinic thought. They understand the importance of Jewish unity, embrace the diversity of our Jewish community, and engage in respectful discourse with those whose philosophy and practices differ from their own.
- Hold a worldview that is shaped by Jewish values. They understand the mandate to engage in tikkun olam and do so by treating humanity and the earth with kindness and compassion. They are motivated to work for peace, to correct the injustices in the world, and to make the world a better place.
- Feel a deep connection to the State of Israel as the homeland of the Jewish people, understand her importance to the future of our people, and are equipped to defend her right to exist as a Jewish state.
- Become the leaders of the Jewish and secular communities in which they will reside.

Our legacy donors are people like you who understand the critical role of Jewish Day School Education in securing the Jewish future. Please join us by making a legacy commitment to the Hebrew Academy.

Management Strategy

Lead person responsible for keeping the team on track	Carolyn Levine, Nathan Graber
Conversations with donors	Each team member
Tracking gifts, documents, and records	Bess Wadler
Submitting quarterly reports and other required documentation	Gail Kendall
Implementing the marketing plan	Sandy Schuman
Implementing the stewardship plan and relationship building	Gail Kendall
Making thank-you phone calls	Solicitor
Sending thank-you notes	Julie Pollack
Making sure legacy events take place	Julie Pollack
Making sure donor lists are printed	Julie Pollack
Informing the Board of Trustees	Julie Pollack

Target Audiences and Prospects

Year 1	Year 2	Year 3
<ul style="list-style-type: none"> • Team members • Trustees • Past presidents • Recent consistent donors (previous 5 years) 	<ul style="list-style-type: none"> • Past officers • Past trustees • Retired faculty • Former heads of school • Retired staff • Former Academy Awards honorees 	<ul style="list-style-type: none"> • Two-generation families • Parents & grandparents of former students • Former students • Current faculty • Current parents & grandparents

Marketing

- We will explain and promote the Life & Legacy program:
 - at a number of events and programs during the school year. In aggregate, these events will reach current students and their parents, former students and their parents, faculty, and donors. Examples of events at which we will promote and explain the program are shown in the table below, Marketing and Stewardship Events.
 - by creating a donor packet or handout that will be available for distribution at events and for special mailings to prospective donors.
 - in periodic articles in our Shabbaton newsletter, distributed bi-weekly to our donors, parents, and friends.
 - at our meetings with our Jewish community partners.
 - A public display (of some form, to be determined) will be shown near the entrance to the school. A portable version will be made so it can be displayed at all school events.

Legacy Plan – Bet Shraga Hebrew Academy of the Capital District – Revised 3/12/18

- We will create a “Legacy Society”:
 - A webpage will explain the program, recognize and provide testimonials from legacy donors, and enable visitors to obtain more information or complete the Letter of Intent form.
 - We will interview legacy donors and, with their permission, publish their stories on our webpage, Shabbaton newsletter, and in other forms.
 - Legacy Society members who attend events will be given name tags indicating their membership.
- We will:
 - use the tagline, “Please remember the Jewish community with a gift in your will, trust, retirement plan, or life insurance policy” in our website, Facebook page, and program materials.
 - incorporate a “Leave a Legacy” button on our website and Facebook page.
- In coordination with Federation and other L&L partners we will:
 - coordinate our efforts with others to enhance our collective impact.
 - provide materials for Federation’s Continuing Professional Education program for local attorneys and financial planners regarding the preparation of wills and bequests for their clients.

Stewardship and Relationship Building

- Upon receipt of letter of intent, the team member who solicited the gift will call to thank the Legacy Donor.
- Julie Pollack will send a handwritten thank-you note. The notes will be HACD specific, such as cards made from the artwork of students.
- We will invite Legacy donors to join in several events and programs during the school year to thank them and to let them spend time with our students, faculty and alumni. Attendees will receive a name badge and be listed in the public display board indicating their membership in the Legacy Society. Examples of events to which we will invite Legacy Donors are shown in the table below, Marketing and Stewardship Events.
- Programs or handouts at each event will include a list of Legacy Donors along with a list of current year Shomray Torah (Annual Appeal) donors.
- We will include a continually updated list of Legacy Donors on our web-site and on our weekly Shabbat e-mails, which are sent to 700 contacts.
- Personal contact via “student art” notecards or phone calls from middle school students at least annually.

Marketing and Stewardship Events:

Event	Mo/yr	Market L&L	Invite Donors	Recognize Donors
Yom Ha'atsma'ut Dinner	4/18	X	X	X
Academy Awards Annual Gala	5/18	X	X	X
School Play	5/18	X	X	X
Grandparents and Special Friends	5/18	X	X	X
Annual Meeting and School Picnic	6/18	X	X	X
Graduation	6/18	X	X	X
Oneg Shabbat	weekly	X	X	X
Board of Trustees Meetings	monthly	X		X
Meet the Teacher Night	9/18			X
Torah Procession	10/18		X	X
Hanukkah Dinner	12/18	X	X	X
Tu B'Shevat Seder	1/19	X		
Science Fair	1/19	X	X	X
Purim Dinner	2/19	X	X	X

Goals

Legacy Plan – Bet Shraga Hebrew Academy of the Capital District – Revised 3/12/18

Year 1: March 2018 – February 2019	Letters of intent	Letters of intent
• Legacy Team Members	6	6
• Board of Trustees	8	10
• Past Presidents	2	4
• Recent Consistent Donors	2	5
Total Anticipated Gifts in Year 1	18	25
Year 2: March 2019 – February 2020		
• Recent Consistent Donors	8	10
• Former Academy Awards honorees	3	5
• Past Officers	2	3
• Past Trustees	1	2
• Retired Faculty	1	2
• Current parents	1	1
• Former Heads of School	1	1
• Retired Staff	1	1
Total Anticipated Gifts in Year 2	18	25

Implementation Checklist

Legacy Plan – Bet Shraga Hebrew Academy of the Capital District – Revised 3/12/18

February '18	<ul style="list-style-type: none"> □ Submit Draft of Plan □ Establish program for tracking donor information, discussions, gifts, stewardship information □ Shabbaton/Web page/Social Media announcement of Program □ “Leave a Legacy” button institutionalized on all the above □ Email blast announcement from President of Board “We’ve been selected!” □ Establish other marketing tools for in school presence □ Delineate first year asks □ Review Legacy Plan with Arlene □ Finalize Case Statement/forms on-line
March	<ul style="list-style-type: none"> □ Legacy Team members submit letter of intent □ Commence legacy asks <ul style="list-style-type: none"> ○ Call within 24h from solicitor ○ Handwritten notes from Julie within 48h □ Monthly Shabbaton updates/link to legacy web site □ Board Meeting Presentation <ul style="list-style-type: none"> ○ Power Point/Primer on Giving □ Legacy Donor Board Display <ul style="list-style-type: none"> ○ Weekly Oneg Shabbat ○ Purim Dinner
April	<ul style="list-style-type: none"> □ Donor Board display Pre-Passover Dinner □ Bimonthly Legacy Team meeting □ Stewardship plan fully functional/invitations to events etc. □ Yom Ha'atsma'ut Dinner
May	<ul style="list-style-type: none"> □ Academy Awards Event and Program/presentation/pamphlet □ Grandparent SF presentation □ School Play presentation
June	<ul style="list-style-type: none"> □ Graduation presentation/donor Board □ Annual Meeting & Picnic presentation/Legacy Board □ Bimonthly Legacy Team meeting
Summer	<ul style="list-style-type: none"> □ Continue Life and Legacy asks
September	<ul style="list-style-type: none"> □ Bimonthly Legacy Team Meeting □ Rosh Hashanah Card/ Calls from Students □ Meet the Teacher Night
October	<ul style="list-style-type: none"> □ Life and Legacy mention on Shomray Torah information
November	<ul style="list-style-type: none"> □ Bimonthly Legacy Team meeting
December	<ul style="list-style-type: none"> □ Hanukkah Dinner
January '19	<ul style="list-style-type: none"> □ Bimonthly Legacy Team meeting □ Science Fair □ Tu B'Shevat Seder
February	<ul style="list-style-type: none"> □ Purim Dinner

