



Jewish Federation[®] & Jewish Foundation

OF NASHVILLE AND MIDDLE TENNESSEE

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.

Case Statement

Since 1936, the Jewish Federation and Jewish Foundation of Nashville and Middle Tennessee has provided vital financial and humanitarian assistance **wherever and whenever Jews are in need**. With an **infrastructure** that is both local and international in scope we **respond efficiently and immediately when Jews are in crisis**. We help our multi-generational community make Jewish choices by investing in innovative and cutting edge programs and services. Sacred Jewish values of **gemilut chasadim** (acts of loving kindness) and **Tzedakah** (justice and righteousness) guide us.

We revitalize Jewish life, we rescue Jews in peril and we foster vibrant Jewish communities locally, nationally and globally. Jewish people continue to thrive and grow from generation to generation (**I'dor v'dor**). By convening and collaborating with our valued partners, we nurture a unified, yet diverse, and cohesive Jewish community to provide the necessary philanthropic and charitable resources that perpetuate a proud Jewish future.

The Jewish Federation is uniquely positioned to facilitate strategic planning for the community. We address the most pressing and urgent communal needs. Our community relations efforts extend to the greater community to combat anti-Semitism, advocate for Israel, and partner with other faith and minority communities. We care for each other and serve as a community beacon for compassion, equality and social justice.

To reinforce our special partnership with Jews in Israel and worldwide, **Klal Yisrael**, we preserve and protect the unity of the Jewish people. We honor the past while planning for the future.

Our legacy society members are people like you who want to make a transformational impact and:

- Save Jewish lives and ensure that the frailest members of our community live in dignity;
- Foster connections to Israel;
- Support Jewish education, Holocaust education and Israel education;
- Stimulate religious and spiritual growth and preserve and strengthen local Jewish institutions;
- Honor community memory and help our next generation make Jewish choices; and
- Create a welcoming community for newcomers and long-time residents.

At the Jewish Federation and Jewish Foundation you can fulfill your philanthropic vision alongside many other generous community members who have planted seeds for future generations.

Blaze a bold and proud path into the future! It is in your hands to write your own Jewish story, making your mark on Jewish history through compassionate and caring actions. The great Rabbi Hillel said in a message that still resonates today, **"If I am not for myself, then who will be for me? And if I am only for myself, then what am I? And if not now, when?"**

MANAGEMENT PLAN:

The Jewish Federation and Jewish Foundation Team assignments are represented in the grid below. Team members will be involved in solicitation and will be involved in some form of stewardship (at least personal calls and thank you notes to prospects and donors).

	Mark Freedman (Lead staff)	Naomi Sedek (staff)	Norma Shirk/ Tania Bukergolts (admin staff)	Harriet Schiffan (staff)	David Steine (Team Captain)	Risa Klein Herzog	Adam Landa	Lisa Perlen	James Fishel	Adam Dretler	Carol Hyatt	Mark Goldfarb	Mindy Hirt	Steven Riven	Felicia Anchor	Alex Limor	Erin Coleman
Legacy Plan Implementation	✓	✓	✓		✓												
Solicitations (one/month)	✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Track gifts, documents & records			✓				✓										
Solicitor Thank you calls/notes	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Reporting to Federation	✓		✓												✓		
Reporting to Board of Directors	✓				✓		✓	✓									

Marketing		✓- w/ Lisa Smith	✓								✓		✓	✓				✓	
<ul style="list-style-type: none"> • Banner • Website Page • Printed Brochures • Bulletin Articles • Dedicated Mailing • Email Reminders 																			

Stewardship Programs	✓		✓		✓						✓		✓		✓		
Personal notes/calls	✓										✓		✓		✓		
Create Legacy Society	✓		✓														
Cards for holidays/birthdays		✓	✓														
Annual special Legacy Society Event	✓	✓	✓														

TARGET AUDIENCES/PROSPECTS: (who have not already created a Legacy Gift)

- 1) Legacy Team (17 including Staff)
- 2) Board of Directors (19)
- 3) Past Presidents and Campaign Chairs (18)
- 4) Holocaust Memorial Affinity will be going on simultaneously
- 5) Long Time Donors (all levels) (1,100)
 - o Silver Circle Society
 - o Bonim Society (\$1,000+)
 - o Donors below 40 years

- 6) Current Federation Committee Members (80'ish) (Grants, P2G, Campaign, Investment, Development, CRC, Ambassadors)
- 7) Fund Holders (to include select B'nai Tzedek families) (400)
- 8) Young Leadership and Presidential Award Recipients (9)
- 9) Multi-Generational Nashville Families (150)

MARKETING PLAN:

We will utilize the following methods to market Jewish Federation's LIFE & LEGACY program:

- 1) E-Blasts
- 2) Observer, Jewish Newspaper Articles and Ads
- 3) JFED Website- Put case statement on website
- 4) Social Media (Facebook)
- 5) Annual Report
- 6) Banners at all agency and congregational locations
- 7) Newsletters (Quarterly) that will focus on total FRD including L&L and Annual Campaign (highlighting needs and donors)
- 8) Book of Life Donor Recognition Display
- 9) Direct Mail (mostly integrated into other mailings i.e. Quarterly Reports, Bills, Annual Campaign 3x/year)
- 10) Taglines on e-mails
- 11) Events: Messaging on Invitations, Signage at events, Verbal Messaging from Podium
- 12) Include LIFE & LEGACY information in Direct Mail Rosh Hashanah Appeal
- 13) Rosh Hashanah Greeting Annual Mailing – add LIFE & LEGACY Prospects to the list

STEWARDSHIP AND RECOGNITION:

The Jewish Federation and Jewish Foundation of Nashville and Middle Tennessee has an active program of stewardship and donor recognition in its ongoing annual campaign and foundation development activities. We plan to integrate our legacy donors into our ongoing stewardship activities, especially at annual events and ongoing programs and by featuring legacy donors in the Jewish Observer. We will also be publishing a Life & Legacy newsletter that will include various donor recognition features.

We plan to steward LIFE & LEGACY donors as follows:

- 1) Personal phone calls following solicitations and following signing a LOI.
- 2) Personalized thank you notes for LOI's from the solicitor and with the Stewardship leader.
- 3) Recognition in the Jewish Foundation Book of Life.
- 4) Features in The Observer and Federation Matters to highlight LIFE & LEGACY donors.
- 5) Birthday cards, Rosh Hashanah Cards to prospects and committed donors.
- 6) Special cards on the Anniversary of a donor's LOI commitment.
- 7) Special mailing of Federation Annual Report (highlight L&L donors in A.R.) with personal letter of thanks to LOI's.
- 8) Special Reception before 2017 Jewish Federation Annual Meeting for Book of Life and Legacy Donors.
- 9) Special Event specifically for JFED L&L donors (*considering*).
- 10) Special L&L recognition on name tags and/or from podium at various JFED events (Bonim Dinner, Annual Meeting, Tzedakah Tzunday, CRC Events, other...)
- 11) Highlight a legacy donor in our newsletter with a personal testimonial.
- 12) THANK YOU added on the Tzedakah Tzunday calls to LIFE & LEGACY Society members.

GOALS:

YEAR 1:	GOAL:	STRETCH:
LEGACY TEAM (12)	4	6
JFED BOARD	3	5
PAST PREZ'S/CAMP CHAIRS	3	4
JFED CMTE MEMBERS	5	6
LONG TIME DONORS	<u>3</u>	<u>4</u>
TOTALS	18	25
YEAR 2:	GOAL:	STRETCH:
LEGACY TEAM	2	3
JFED BOARD	3	4
PAST PREZ'S/CAMP CHAIRS	3	4
JFED CMTE MEMBERS	4	5
LONG TIME DONORS	2	4
JFND FUND HOLDERS	3	4
AWARD/INCENTIVE RECIPIENTS	<u>1</u>	<u>1</u>
TOTALS	18	25

IMPLEMENTATION STRATEGY:

Implementation Check List

- | | |
|--|-------------------|
| <ul style="list-style-type: none"> <input type="checkbox"/> Host group presentations for Board of Directors and Foundation Trustees. <input type="checkbox"/> Finalize case statement and LIFE & LEGACY plan for year 1. | April 2017 |
| <ul style="list-style-type: none"> <input type="checkbox"/> Launch LIFE & LEGACY Society of the Jewish Federation and Jewish Foundation of Nashville and Middle TN. <input type="checkbox"/> Send FRD NEWSLETTER #1 incorporating Life & Legacy program. <input type="checkbox"/> Meet with TEAM to secure Team members' letters of Intent. <input type="checkbox"/> JFED Holocaust memorial Sub team meets to Identify Key prospects <input type="checkbox"/> Meet with TEAM to assign solicitation assignments for board and trustees. <input type="checkbox"/> Schedule individual follow up meetings with the JFED board. <input type="checkbox"/> Incorporate Life & Legacy information on all future marketing materials. <input type="checkbox"/> Add LIFE & LEGACY material to Federation Focus. | May 2017 |
| <ul style="list-style-type: none"> <input type="checkbox"/> Upload information to Book of Life. <input type="checkbox"/> Presentation to senior staff members. <input type="checkbox"/> Work with TEAM to identify 12 major donors to have a conversation with. <input type="checkbox"/> Incorporate LIFE & LEGACY information and case statement on website. <input type="checkbox"/> Add LIFE & LEGACY material to Federation Focus. <input type="checkbox"/> JFED Holocaust Sub team divides and assigns prospects to team members. <input type="checkbox"/> JFED Holocaust Sub team to set appointments with Holocaust Memorial affinity group. <input type="checkbox"/> Special Reception for LIFE & LEGACY Society before the Jewish Federation Annual Meeting | June 2017 |

July 2017

- Facebook Posts/ LIFE & LEGACY email to be sent out.
- Work with TEAM to identify and assign Past Presidents and Past Campaign Chairs.
- Add LIFE & LEGACY material to Federation Focus.
- JFED Holocaust Sub team to set appointments with Holocaust Memorial affinity group.

August 2017

- Send FRD NEWSLETTER #2 incorporating LIFE & LEGACY program. Highlight a legacy donor in our newsletter with a personal testimonial.
- Add LIFE & LEGACY material to Federation Focus.
- JFED Holocaust Sub team to set appointments with Holocaust Memorial affinity group.
- Include LIFE & LEGACY information in Direct Mail Rosh Hashanah Appeal.
- Schedule individual meetings with Past Presidents and Campaign Chairs.
- Continue stewardship methods for all legacy donors.

September
2017

- Rosh Hashanah Greeting Annual Mailing – add LIFE & LEGACY Prospects to the list.
- Facebook Posts/ LIFE & LEGACY email to be sent out Holiday themed emails.
- JFED Holocaust Sub team to set appointments with Holocaust Memorial affinity group.
- Review progress with the 5 groups: Team Members, Board, Long-time donors, Holocaust Memorial Affinity and Past Presidents and Campaign Chairs.
- Add LIFE & LEGACY material to Federation Focus.

October 2017

- Add LIFE & LEGACY material to Federation Focus.
- Continue stewardship methods for all legacy donors.
- JFED Holocaust Sub team to set appointments with Holocaust Memorial affinity group.

November
2017

- Send FRD NEWSLETTER #3 incorporating LIFE & LEGACY program. Highlight a legacy donor in our newsletter with a personal testimonial.
- Add LIFE & LEGACY material to Federation Focus.
- Continue stewardship methods for all legacy donors.
- Meet with TEAM to Identify JFED Committee members.
- Assign TEAM Members to JFED Committee members.

December
2017

- Add LIFE & LEGACY material to Federation Focus.
- Team members to make appointments with JFED committee members.
- Continue stewardship methods for all legacy donors.

January 2018

- Special Recognition for LIFE & LEGACY Society members at the Bonim Society Dinner.

- ANNUAL CAMPAIGN MONTH begins Send FRD NEWSLETTER #4 incorporating LIFE & LEGACY program. Highlight a legacy donor in our newsletter with a personal testimonial.**
- Review progress with the 6 groups: Team Members, Board, Long-time donors, Holocaust Memorial Affinity, Past Presidents and Campaign Chairs, and JFED Committee Members.**

February
2018

- THANK YOU added on the Tzedakah Tzunday calls to LIFE & LEGACY Society members.**

March 2018

- Continue stewardship methods for all legacy donors.**

April 2018

- Meet with TEAM to strategize for Year 2.**
- Continue stewardship methods for all legacy donors.**
- Review progress with the 6 groups: Team Members, Board, Long-time donors, Holocaust Memorial Affinity, Past Presidents and Campaign Chairs, and JFED Committee Members.**

May 2018