



## **Jewish Federation of Greater Seattle LIFE & LEGACY™ Action Plan**

### **Case Statement**

Founded in 1928, the Jewish Federation of Greater Seattle exists to ensure a vibrant Puget Sound Jewish community. We are dedicated to serving the community's changing needs and creating Jewish Connections for Life. We value asking our community members about what they need, want, hope for and dream. We listen to what they have to say and then provide the pathways for them to engage Jewishly at every stage of life.

Today, we serve a fast-growing, geographically and culturally diverse community of people seeking to participate in Jewish life in ways that fit their individual Jewish journeys. The Federation is committed to bringing accessible, welcoming and meaningful opportunities to everyone who wants to connect. If you are Jewish and you want to engage in Jewish life, the Federation will make sure that Jewish life is brought to you.

In partnership with the American Jewish Joint Distribution Committee (JDC) and the Jewish Agency for Israel (JAFI), the Federation ensures that Jews in Israel and around the world receive vital social services. We foster Jewish connections here at home, with Israel and across the world.

Through our programs, children and families are nurtured with songs, stories and participatory learning opportunities. We help develop the capacity of our up-and-coming leaders to step into roles responsible for the sustainability of our Jewish organizations. We collaborate with others to secure essential resources for our regional Jewish partners.

Our legacy donors are people like you, who want to demonstrate and honor their values by ensuring that our children and grandchildren have the same opportunities to live a meaningful Jewish life that we do. Please join our special legacy donors, and together ensure a vibrant Jewish future in the Puget Sound region!

## Management Plan

### Legacy Team

**Keith Dvorchik**, President & CEO

\_\_\_\_\_, Director of Development (DD)

**Jim DiPeso**, Marketing & Communications Manager (MM)

**Sierra Lawe**, Foundation Manager (FM)

### Legacy Team Supporters

**Lenore Costello**, Development Coordinator (DC)

**Lynn Feldhammer**, Development Officer (DO)

**Liz Richmond**, Development Officer (DO)

**Rachel Rosenman**, LIFE & LEGACY™ Associate (LL)

### **Legacy Team Officer(s):**

President & CEO

- Oversee and ensure that plans are implemented, progress is monitored, and that all are fulfilling their responsibilities
- Communicate with team and Federation leadership
- Report to board on progress
- Ensure monthly meeting and annual gift goals are met, and if not, identify challenges and barriers of why not to discuss and address with leadership
- Steward and build relationships with prospective and committed donors
- Make appointments, conduct meetings, send thank you notes and make follow up calls
- Inform DC of all contact, progress and updates for appropriate tracking and dissemination of information as appropriate

Director of Development (DD)

- Oversee and ensure that plans are implemented, progress is monitored, and that all are fulfilling their responsibilities
- Facilitate regularly scheduled Legacy Team meetings
- Steward and build relationships with prospective and committed donors
- Make appointments, conduct meetings, send thank you notes and make follow up calls
- Inform DC of all contact, progress and updates for appropriate tracking and dissemination of information as appropriate

### **Legacy Team Champions:**

Marketing Manager (MM)

- Oversee implementation of legacy program marketing and identification of marketing opportunities
- Steward and build relationships with prospective and committed donors
- Make appointments, conduct meetings, send thank you notes and make follow up calls

Foundation Manager (FM)

- Steward and build relationships with prospective and committed donors
- Make appointments, conduct meetings, send thank you notes and make follow up calls

#### Development Coordinator (DC)

- Track gifts and maintain documents and records
- Submit quarterly reports to Life & Legacy and other required documentation
- Help and support coordination of all events to cultivate and recognize legacy prospects and donors

#### Development Officer(s) (DO)

- Steward and build relationships with prospective and committed donors
- Make appointments, conduct meetings, send thank you notes and make follow up calls
- Inform DC of all contact, progress and updates for appropriate tracking and dissemination of information as appropriate
- Work with CEO & DC in coordination with Events Associate to plan and execute events, gatherings, meetings, etc. with prospects and donors

#### LIFE & LEGACY™ Associate (LL)

- Schedule and help facilitate regular Legacy Team meetings
- Work with CEO & DD to set Legacy Team meeting agenda
- Work with CEO & DC in coordination with Events Associate to plan and execute events, gatherings, meetings, etc. with prospects and donors

#### Target Audience(s)

- Board and committee members
- Past presidents and lay leaders
- Long time, consistent donors (regardless of amount)
- Multigenerational families associated with JFGS
- Longstanding donors and volunteers of 7+ years
- Descendants of past presidents who may not be associated with JFGS now
- Auxiliaries/groups to speak/present to:
  - Board members
  - Donor Advised Fund (DAF) holders
  - 55+ Audience
  - PAVE
  - PJ Library families
  - J-Tech
  - Women's Philanthropy
  - Advanced Leadership Development Program (ALDP)
  - Wexner graduates
  - Cardozo Society
  - Maimonides Society
  - Israel scholarship recipients (current & past)
  - Past camp scholarship recipients
  - Cuba Mission participants

## Marketing Plan

	Federation-Specific	Community-Wide/Cohort-wide
JFGS Website: jewishinseattle.org	On-going list of Legacy Society members to date with highlight of new members every month	Prominent program promotion on home page
Jewishlegacyseattle.org	website will eventually (2017) have info about L&L program: how to join, program statistics, how to give to the Fed, explanations of giving vehicles, etc.	Website as education for the community and as a resource for cohorts
Jewish In Seattle Magazine	N/A	LIFE & LEGACY related articles/ads <ul style="list-style-type: none"> <li>• Profile/testimonial/story from different donors</li> <li>• Separate “ad” highlighting program success 1-2x/year</li> </ul>
Special Report Newsletter	Small highlight and/or donor quote	Program progress/impact report; highlight organizational partners + donor profiles/testimonials/stories
Weekly e-blasts “Puget Sound Jewish Life”	<ul style="list-style-type: none"> <li>• Standard blurb-----&gt; will link to Rachel’s email address (in case people want more info)</li> </ul>	<ul style="list-style-type: none"> <li>• Standard blurb “please remember the Jewish Community in your will, estate plan or by designated beneficiary” in every issue with link to Rachel’s email</li> </ul>
Social Media (Facebook, Twitter & YouTube)	<p>Work with marketing to determine the best frequency &amp; messaging strategies</p> <ul style="list-style-type: none"> <li>• Post an announcement for every new member (with their permission) and a short quote of why they made the commitment and/or what JFGS means to them.</li> <li>• Invite those Legacy Society members active/comfortable on FB to comment, share and “like” any legacy society/planned giving related posts</li> <li>• Post video testimonials from legacy donors on YouTube Channel</li> </ul>	<p>Work with marketing to determine the best frequency &amp; messaging strategies</p> <ul style="list-style-type: none"> <li>• Highlight Partner Organizations in some way</li> </ul>
Marketing Materials	<ul style="list-style-type: none"> <li>• All-Fed Email signatures: “please remember the Jewish Federation of Greater Seattle in your will, estate plan or by designated beneficiary”</li> <li>• Lobby Poster (Fed-specific is ideal, will use community-wide if we create one)</li> <li>• Power Point Presentation (including testimonials written (with photo) and video of Legacy Donors)</li> <li>• Direct Mail Postcard (see Kick-Off Blitz below)</li> </ul>	<ul style="list-style-type: none"> <li>• Folder of Case Statements</li> <li>• Lobby Poster (if desired by cohort)</li> <li>• Power Point Presentation (for sharing success of program with community and/or recruiting new orgs for future cohorts)</li> <li>• Other materials as needed/requested/determined to be beneficial</li> </ul>
Kick-Off Blitz	<ul style="list-style-type: none"> <li>• Direct Mail postcard: What’s your Jewish Legacy? (see L&amp;L Info piece)</li> </ul>	

## Stewardship & Recognition

	Federation-Specific	Community-Wide/Cohort-wide
<b>Where:</b>		
JFGS Website: jewishinseattle.org	Legacy Society Members will be listed through link on L&L page	
Jewishlegacyseattle.org	N/A	General thank you to ALL donors who have made legacy gifts to our cohort partners and/or to other Jewish orgs in the Puget Sound region
Digital display in the board room	Legacy Society Members will be listed	N/A
Special Report Newsletter	<ul style="list-style-type: none"> <li>Members of Legacy Society will be listed</li> <li>Will feature a Legacy Society member and their story</li> </ul>	General thank you to ALL donors who have made legacy gifts to our cohort partners and/or to other Jewish orgs in the Puget Sound region
<b>What:</b>		
Celebrations/events/dinners (Year One)  (Year Two—TBD based on interest)	<ul style="list-style-type: none"> <li>Invitation-only “pre” event for a community wide event or program</li> <li>Event/dinner at the home of a board/legacy society member</li> </ul>	Community wide celebration at the end of Year 1
Tangible Gifts	Possibly create a gift item (Judaica) for those who join the Legacy Society	Possible parting gift of some kind at Year 1 celebration event
<b>When:</b>		
A donor signs a Letter of Intent (LOI)	<ul style="list-style-type: none"> <li>Solicitor sends hand written thank you note to donor</li> <li>President &amp; CEO makes personal thank you phone call to donor</li> <li>Donor name is added to Legacy Society list and is published via methods listed above (if permission is given)</li> </ul>	LIFE & LEGACY™ Associate celebrates Partner team with congratulatory communication to the team AND to the entire cohort
Partner/Auditing organizations reach LOI milestones of 18 and again at 25	<ul style="list-style-type: none"> <li>President &amp; CEO makes congratulatory announcement</li> <li>LIFE &amp; LEGACY™ Associate creates award certificate</li> </ul>	<ul style="list-style-type: none"> <li>President &amp; CEO makes personal congratulatory phone call</li> <li>LIFE &amp; LEGACY™ Associate creates award certificate</li> </ul>
Donor LOI or formalization of gift anniversary date	Hand written acknowledgement card	N/A
Any Federation Event	Verbal thank you to Legacy donors	Verbal thank you to Legacy donors

## Setting Goals

Year 1 - FY17	Group Presentation	1-on-1 Conversation	Legacy Gift LOIs
Board of Directors	1	18	10
Past Presidents	NA	5	2
Multigenerational Families & Descendants	NA	5	2
Lions of Judah	1	10	2
Long term, consistent donors and/or mailing to invite to event/seed a call	1	10	2
Totals:	3	48	18

Year 2 – FY18	Group Presentation	1-on-1 Conversation	Legacy Gift LOIs
Board of Directors	1	5	5
Past Presidents	NA	4	2
Long term, consistent donors (potential event)	1	15	5
Lions of Judah	1	10	3
Board Members' Networks/Conversations	NA	18	3
Totals:	3	57	18

**Total # of Legacy Gifts FY17 & FY18: 36**

## Plan Implementation

Timeline	Activity: Federation-specific	Activity: Community-wide/cohort-wide
Feb/Mar/Apr 2016	Training events (-----→)	<ul style="list-style-type: none"> <li>• Kick-Off event “Why Legacy?/Why Now?” 2/22/16</li> <li>• Cohort selection (Mar 2016)</li> <li>• “Writing Your Legacy Plan” training 4/7/16</li> </ul>
May/June 2016	<ul style="list-style-type: none"> <li>• Complete draft and final Legacy Plans</li> <li>• Individual consultation meeting with Tammy</li> </ul> Training events (-----→)	<ul style="list-style-type: none"> <li>• Create and distribute Letter of Intent (LOI)</li> <li>• “The Legacy Conversation” training 5/24/16</li> <li>• Program Launch Date 6/1/16</li> <li>• Quarterly Reporting training 6/28/16</li> </ul>
Jul/Aug 2016	<ul style="list-style-type: none"> <li>• Work to expand Legacy Team to include Lay Leaders</li> <li>• Finalize Stewardship and Recognition program and procedures</li> <li>• Prepare ads, brochures (case statement), Website content</li> <li>• Legacy Team to prepare and provide standard talking points to share with Team Fed</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare FAQs/info sheets re: endowment and giving vehicles</li> <li>• Update and print revised LOI</li> <li>• Identify community marketing opportunities including: folder of cohort case statements, possible lobby poster, HH marketing materials</li> <li>• Begin design/printing of community marketing materials as needed</li> </ul>
Sep/Oct 2016	<ul style="list-style-type: none"> <li>• Send Kick-Off Blitz postcard to donors 5+ years</li> <li>• Launch Social Media campaign with introductory posts on JFGS FB &amp; Twitter pages. Encourage Legacy Society members to share, comment and like.</li> <li>• Begin featuring ad/contact info in every e-blast</li> <li>• Conduct one-on-one conversations</li> <li>• Submit 1<sup>st</sup> Quarter Reports to LIFE &amp; LEGACY™ Associate (10/10/16)</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>
Nov/Dec 2016	<ul style="list-style-type: none"> <li>• <b>Hold Group Presentation to Board</b></li> <li>• Conduct one-on-one conversations</li> <li>• Individual consultation meeting with Tammy</li> <li>• Training event (-----→)</li> <li>• <b>Hold Group Presentation for targeted event group (long-term, consistent donors?)</b></li> </ul>	<ul style="list-style-type: none"> <li>• “Effective Stewardship” training 11/3/16</li> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>

Jan/Feb 2017	<ul style="list-style-type: none"> <li>• Conduct one-on-one conversations</li> <li>• Begin to create PowerPoint Presentation including a library of testimonials of members (written, video and a photo) for future use.</li> <li>• Submit 2<sup>nd</sup> Quarter Reports to LIFE &amp; LEGACY™ Associate (1/31/17)</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>
Mar/Apr 2017	<ul style="list-style-type: none"> <li>• Conduct one-on-one conversations</li> <li>• Begin to sketch out Year 2 Plan implementation (including working with HGF to develop Year 2 Aggregate Goal)</li> <li>• Submit 3<sup>rd</sup> Quarter Reports to LIFE &amp; LEGACY™ Associate (4/10/17)</li> </ul>	<ul style="list-style-type: none"> <li>• Begin to sketch out Year 2 Cohort Training Schedule including organizing possible additional speakers/events for cohort</li> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>
May/June 2017	<ul style="list-style-type: none"> <li>• Hold Group Presentation to Lions of Judah (?)</li> <li>• Training event (-----→)</li> <li>• Conduct one-on-one conversations</li> <li>• Hold first recognition event for JFGS Legacy Society Members</li> <li>• Submit 4<sup>th</sup> Quarter Reports to LIFE &amp; LEGACY™ Associate (6/9/17)</li> </ul>	<ul style="list-style-type: none"> <li>• “Marketing Your Legacy Program” Training (date May TBD)</li> <li>• Issue Special Report Newsletter: Feature testimonial of one Legacy Society member, message from Legacy Team and listing of members in issue of Newsletter along with ad (to appear in every special issue) along with contact info</li> <li>• Year 1 Celebration (1<sup>st</sup> half of June)</li> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>
July/Aug 2017	<ul style="list-style-type: none"> <li>• Conduct one-on-one conversations</li> <li>• BEFORE July 15: (LL) submits to HGF: “Year 1 Check Request Form”, Year 1 actual budget, final Year 1 reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to identify/design/print community marketing opportunities and materials</li> </ul>