



When individuals and families in our community are in need, Jewish Family Service of Nashville and Middle Tennessee (JFS) is ready to **guide** them from crisis to **calm**, from struggle to **personal growth**, and from isolation to **connection**. We support and strengthen our sacred community: one child, one adult and one family at a time.

**One Who Saves a Single Soul Saves an Entire World. Sanhedrin 37a.**

Guided by this fundamental Jewish value, we support families as they deal with basic human needs, life transitions and challenges, and mental health issues. We respond to these challenges by providing exceptional social services that

- **Assist families through crisis**, including emergency financial assistance and counseling on a sliding-fee scale to ensure mental health access for all.
- **Help children grow stronger** through empowering educational programs impacting preschoolers through teenagers.
- **Care for older adults** with dignity and respect, through supportive programs that nourish their bodies and souls.

For more than 164 years, JFS has remained vital and relevant—and always available to respond, no matter how difficult the problem—by continuously adapting our programs and services to meet the changing needs of our dynamic population.

One call to JFS is all it takes to set things in motion. Our staff of highly-trained, compassionate professionals work together to provide a seamless system of support for everyone in the family – children, teens, adults and seniors. We offer compassionate, carefully-designed wraparound services that help individuals and families thrive by fostering their physical, mental, and financial well-being. And if clients need a service that JFS does not itself offer, we draw on our vast network of relationships in Nashville’s social service sector to connect them with a provider that does.

JFS maintains strong partnerships with synagogues, religious schools, Akiva, the Gordon JCC, and other social service providers. These partnerships broaden our collective reach and increase our effectiveness, ensuring that all clients have access to the services they require.

JFS Legacy Society Members are people like you, who want to:

- Enable JFS to meet the challenge of changing social and economic conditions that constantly create new needs and that demand new and innovative responses.
- Ensure that when community members are in need or in crisis, they will always be able to turn to JFS for support and guidance.
- Stand up and be counted as part of your community’s collective effort to create a more just world for your generation and for those to come.

*From its humble origins in 1853 as the Hebrew Benevolent Society, concerned with supporting orphans, the sick and destitute, Jewish Family Service of Nashville and Middle Tennessee has evolved into a full social service agency and a critical thread of continuity in our ever-changing community.*

***Please Join Us in ensuring JFS is here to serve for another 164 years and beyond!***

**Jewish Family Service of Nashville and Middle Tennessee  
Life and Legacy Plan**

**1) Management Strategy :**

Our legacy team: Howard Safer – Team leader

Pam Kelner, Executive Director, Howard Safer- Board President, Ben Russ – President-elect, Sandra Hecklin – Immediate Past-President. Nancy Flexer- Secretary - stewardship. The team may be expanded to include past board presidents, Board members, or major donors who can be helpful during the solicitation process.

- Legacy Plan implementation –Sandra Hecklin
- Thank you notes and thank you calls – Pam Kelner and Legacy team. Nancy Flexer for notes
- Track gifts, documents and records – Janet Parr
- Submit quarterly reports – Janet
- Stewardship and relationship building –Nancy Flexer (with support from team)
- Oversee marketing efforts – Pam with assistance from Tara Goldberg (Board Secretary)
- Inform Board of Directors of progress - Howard
- Who will be making the calls? Howard, Sandra and Ben or past board-president if appropriate with Pam as staff member

**2) Target Audiences & Prospects**

- Team Members
- Board of Directors
- Longtime volunteers
- Staff
- Major donors (contributed over \$500 annually for 3-5 years)
- Loyal Donors (contributed to any campaign at any level over more than 5 years)
- Past Board Presidents
- Past Board Members
- Chesed honorees
- Chaver and Ruach honorees

**3) Marketing**

A) Communication vehicles currently in place include:

- Newsletters – Fall/Winter print edition. Feature a Legacy donor statement.
- Facebook – periodic posts.
- Website – create a Life and Legacy section under Support where the Case Statement and LOI will be included on the site as well as a listing of all donors. (updated quarterly with date stamp on the website)
- “Please remember JFS with a gift in your will, trust, retirement account or life insurance policy” will be added to email signature lines, in emails with link to website, stationary, envelopes.
- Event materials – ie. chesed booklet and annual meeting programs.

B) Create a tagline to be included in all marketing. Possibly also create a new logo as a play on our existing logo with Legacy giving.

C) Collect 150 word statements from legacy donors on why they have chosen to leave a legacy gift to JFS and feature that, with permission, on the website, Facebook, and in newsletters.

D) Create an eye-catching ad to be included in all marketing vehicles mentioned in A.

E) Letter to donors with ad.

F) Announce the LIFE & LEGACY program at the Chesed event.

**4) Stewardship and Recognition**

- Letter of Intent will be acknowledged by hand-written note signed by Executive Director and Board President within 48 hours of receipt.
- A personal phone call from the team member who solicited the gift, and/or the Executive Director and Board President.
- Come up with a name for the JFS Legacy Society.
- Legacy donors will be listed in the fall/winter newsletter and in the program at Chesed Dinner and Annual Meeting.
- We will create a separate entry on our Website under Support called Life and Legacy. Here we will list the donors, which will be updated as legacy gifts are received.
- We will host a once a year legacy society special event. It may be a stand-alone event (i.e. house party) or in conjunction with our annual meeting (i.e. special catered dinner prior to our annual meeting).
- Birthday cards to legacy donors.
- Acknowledge legacy donors at a holiday...i.e. Rosh Hashanah honey with note hand delivered to legacy donors.

**5) Goals**

**Year 1**

**# of Legacy Gifts**

- |  |          |
|--|----------|
| • Team Members   | 3        |
| • Board of Directors   | 3        |
| • Longtime volunteers  | 1        |
| • Staff  | 1        |
| • Major donors (contributed over \$500 annually for 3-5 years) | 2        |
| • Loyal Donors (contributed at \$150 + for more than 10 years) | 2        |
| • Past Board Presidents  | 3        |
| • Past Board Members   | 2        |
| • Chesed honorees  | <u>2</u> |

Total

**18**

**Year 2**

**# of Legacy Gifts**

- |  |          |
|--|----------|
| • Board of Directors   | 2        |
| • Longtime volunteers  | 1        |
| • Staff  | 1        |
| • Major donors (contributed over \$500 annually for 3-5 years) | 3        |
| • Loyal Donors (contributed at \$150 + for more than 10 years) | 2        |
| • Past Board Presidents  | 2        |
| • Past Board Members   | 2        |
| • Chesed honorees  | <u>1</u> |

**18**

## Jewish Family Service LIFE & LEGACY

Time Period	Activity	Team Members
<b>April 2017</b>	Finalize plan	All
	Create template for tracking conversations/commitments	PK/JP
	Create a L&L ad	PK/TG
	Create Legacy Society name	All
	Announce L&L at Chesed - spoken and in program (ad)	PK/HS
<b>May- August 2017</b>	Solicitations assigned to Team members	PK/SH
	Create a L&L tagline and possible new logo (maybe April)	PK/TG
	Add L&L to Support section of website	PK/JP
	Start meeting with potential donors	All
	Thank you calls/notes after meetings	All plus NF
	Schedule out marketing timeline	PK/TG
	Commitments from all Team members	HS
	Highlight at Annual Meeting including commitments to date - program and spoken	
	Tagline added to email signature lines, in emails with a link to the website	PK/HS PK/TG
	Create an eye-catching ad to be included in all marketing vehicles mentioned in A.	
<b>September - December 2017</b>	Facebook – periodic posts	PK/TG
	L&L article in newsletter highlighting a donor commitment	PK
	Update website with donor personal statements	PK
	First Stewardship - Honey hand-delivered at R. Hashanah	
	Continue meetings/thank you activities	All plus NF
	Parlor meeting with Past-Presidents	All
	Complete meetings with Board members	All
	Plan Legacy Event	PK/NF
	Collect 150 word statements from legacy donors on why they have chosen to leave a legacy gift	PK/NF
	Letter to donors with ad.	
	Legacy donors will be listed in the fall/winter newsletter.	
<b>January - March 2018</b>	Continue meetings/thank you activities	All plus NF
	Meet to review Year 1 and develop plans for Year 2	All
	Legacy Society event held (possibly not until June - Annual Mtg)	PK/NF

*HS= Howard Safer*

*TG = Tara Goldberg*

*NF = Nancy Flexer*

*SH = Sandra Hecklin*

*BR = Ben Russ*

*PK= Pam Kelner*

*JP = Janet Parr*

*All - PK, HS, SH, BR*