

JFS Life & Legacy Plan

Case Statement

Jewish Family Services (JFS) is proud to be the oldest Jewish social service agency in Richmond and at the forefront of providing critical services to those who need it most. For over 166 years, the Jewish philosophy of *Tikkun Olam*, or “repairing the world”, has guided our efforts, from our earliest days to today as we continue to meet changing needs through compassionate service.

Beyond helping individuals and families overcome challenges, we provide services that address the deeper humanitarian issues our community faces and enact long-term, deep change. Whether finding families for orphans displaced by the Civil War, working with Russian Jewish refugees in the aftermath of World War Two and Operation Exodus, counseling runaway youth and veterans in the 1970’s at the Daily Planet, or helping LGBT families through the adoption process, JFS addresses immediate needs while setting the stage for a brighter future.

JFS is a nationally accredited full service health and human services organization that responds to the most critical needs facing our community. We offer the highest quality services that transform people’s lives, no matter their income level and especially when they have nowhere else to turn to for support. Throughout our history and as we move forward, we have and will continue to tackle “big” issues facing our community, such as our aging population, mental health needs, and access to health services for underserved communities.

By becoming a JFS Legacy Donor, you will ensure that JFS:

- Continues to respond to changing community, social, and economic situations through the lens of Jewish values
- Provides high quality service and compassionate care to all who need it, regardless of ability to pay
- Provides critical social services when unforeseen crises occur
- Helps individuals and families overcome life’s challenges

Please JOIN US in securing the future for generations to come by making a legacy gift to JFS.

Management Plan

- 1) The Legacy Team consists of the below members. The team may be expanded to include past board presidents who can be helpful during the solicitation process.
 - Neil Kessler, JFS Trustee
 - Scott Belleman, JFS Trustee
 - Jerry Samford, JFS Trustee
 - Ron Felmus, JFS Board Member
 - Sandy Sisisky, JFS Board Member
 - Bob Rolfe, JFS Past Board Member and Trustee
 - Sydney Fleischer, JFS COO
 - Alissa Aronovici, JFS Development Director
 - Gregg Davidson, JFS CEO
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- Scott Belleman will be the lead person in charge of making sure the plan gets implemented as laid out.
 - Alissa Aronovici will be responsible for tracking gifts, documents, and records in the donor database Etapestry.
 - Scott Belleman and Alissa Aronovici will be responsible for submitting Life & Legacy quarterly reports and other required documentation
 - Alissa Aronovici (Development Director), Mary Johnson (Development Associate), and other staff will be responsible for marketing our Legacy program.
 - Gregg Davidson, Scott Belleman, Sandy Sisisky, Alissa Aronovici will be responsible for stewardship and relationship building with our legacy donors.
 - The solicitor will be responsible for sending a handwritten thank you note to the donor.
 - Alissa Aronovici will be responsible for tracking thank you letter/acknowledgements in the database.
 - Scott Belleman, Sandy Sisisky, Ron Felmus will be responsible for keeping your board of directors informed of your progress at monthly board meetings.

Target Audiences and Prospects

- Board of Directors (15)
- Foundation Board of Trustees (7)
- Longtime Volunteers (20)
- Senior Staff (5)
- General Donor Base (260)
 - Donors over 50 years old

- Major Donors \$1000+ (24)
- Donors who have been giving for over 10 years
- Past Board Presidents (13) & Foundation Chairmen (2)
- Past Board Members & Foundation Trustees
- Clients

Marketing Plan

- Communication vehicles currently in place:
 - Electronic Newsletter (monthly)
 - Website (updates when appropriate)
 - Facebook and twitter pages (daily)
 - Blast Emails (when appropriate)
 - Reflector newspaper articles (monthly)
 - Event materials (when appropriate)
- We will use all of these current methods to communicate the new program, updates to the list, legacy donor testimonials, and the importance of this specific type of giving to the community.
- There is a TV monitor in the JFS lobby that serves as a visible physical location to post information about leaving a Legacy and/or to honor those who do.
- It will be possible to include a small flyer with our regularly scheduled annual fund letters to inform our donor base about these new legacy efforts and create general awareness.
- We will incorporate a Legacy message into an existing information piece (either direct mailer and/or agency brochure).
- Yes, we will raise awareness about the Legacy message and program at our annual meeting and other appropriate special events.
- We will ask certain legacy donors to write a 150 word statement on why they have chosen to leave a legacy to JFS and feature that, with permission, on the website and other print materials.

Stewardship and Recognition

- JFS currently utilizes the below stewardship practices:
 - Names listed in print in our annual report, which is also available electronically on our website.
 - Thank you letters and handwritten notes.

- Personal phone calls.
- Lunches to update donors on agency activities.
- JFS will add these other stewardship practices for Legacy donors:
 - We will create a banner/donor listing for the legacy donors to be used at special events.
 - We will create an event specifically for Legacy donors.
- We will create a separate website page to recognize this program and the list of legacy donors, which will be updated as legacy gifts are received.
- We will make a personal phone call (from the solicitor and/or appropriate staff member) immediately upon receipt of a Letter of Intent.
- We will send a handwritten note by solicitor and appropriate staff member (either CEO or Director of Development) and an official acknowledgement letter from JFS to thank the donor for their Legacy commitment within two days of receipt.
- We will create a Legacy society with a specific name for the society.
- We will list Legacy society members in our monthly newsletter, on our website, and in our annual report. After year one, we may create a wall plaque to recognize Legacy donors. After one year, we may also create a legacy society print newsletter.
- We will create a print newsletter sent once a year to Legacy donors as an organizational update with special Life & Legacy letterhead.
- We will host a once a year Legacy society special event. It may be a stand-alone event or in conjunction with our annual meeting.
- We will honor our Legacy donors at an annual meeting with a banner and donor list.
- We will share testimonials from our Legacy donors with the greater community primarily in our newsletter and on our website with the donor's permission.

Setting Goals

Year 1 Goal: 25 Legacy Gifts	# of Legacy Gifts
Senior Staff – group presentation to 5	2
Board of Directors – group presentation and private conversations with 15	5
Trustees – group presentation and private conversations with 7	4
Major Donors - private conversations with 12	7
Total anticipated gifts in Year 1	18

Year 2 Goal: 25 Legacy Gifts

Past Presidents – group presentation and private conversation with 13	4
Volunteers – private conversations with 10	3
Longtime Donors – private conversations with 10	2
Past Board Members – private conversations with 10	4
Clients - private conversations with 5	2
Major Donors – private conversations with 10	3
Total anticipated gifts in Year 1	18

Implementation Strategy – Year 1

- Incorporate Life & Legacy information and branding in newsletter, website, and other marketing materials.
- Create a legacy society name.
- Include a small flyer with our scheduled annual fund mailings that informs donors of the Life & Legacy program and has a return envelope with the words “please have someone on your staff contact me about planned giving”.
- Schedule a special legacy society event at the end of the fiscal year (June 2017).
- Hold group presentations for board of directors, foundation trustees, and senior staff.
- After completing two of the trainings, a Legacy team member will make a presentation to the JFS board of directors at the April board meeting and will then follow up with individuals over the next few months.
- Summer of 2016 - Identify 12 major donors to have private conversations with.
- Summer of 2016 – Include a small flyer with the annual fund mailing to donor base.
- Work with the Richmond Jewish Foundation and the Federation to create program awareness in the Reflector.

Calendar Checklist

April

- Host group presentations for Board of Directors and Foundation Trustees.
- Finalize case statement and life and legacy plan for year 1.

May

- Create Legacy Society name.
- Newsletter goes out with first information about JFS Life & Legacy program.
- Will upload information to our JFS lobby TV monitor to raise awareness about the overall program.
- Meet with committee to assign solicitation assignments for board and trustees.
- Schedule individual follow up meetings with the board and trustees.
- Incorporate Life & Legacy information and branding in newsletters, website, and other marketing materials.

June

- Work with committee to identify 12 major donors to have a conversation with.
- Group presentation to senior JFS staff members.
- Incorporate Life & Legacy information and case statement on website.

July

- Schedule individual meetings with the 12 major donors.
- Plan/schedule reflector articles, blog posts, and emails about the program.

August

- Include an additional line on our annual fund mailing that informs donors of the program and has a return envelope with the words “please have someone on your staff contact me about planned giving”.
- Schedule individual meetings with the 12 major donors.

September & October

- Work with committee on board member and trustee follow up meetings.
- Highlight a legacy donor in our newsletter with a personal testimonial.

November & December

- Continue stewardship methods for all legacy donors.
- Potentially schedule a small event with legacy donors for a CEO update.

January

- Create a banner/donor listing to be used at special events including the annual gala fundraiser in February.

February & March

- Continue stewardship methods for all legacy donors.
- Potentially create a separate newsletter to send to legacy donors.

April

- Meet with committee to strategize for Year 2

May

- Host a legacy society special event to coincide with the JFS Annual Meeting.