

LEGACY PLAN
Jewish Community Foundation of NM
LIFE & LEGACY™ New Mexico Opportunity Fund

4/30/18 - FINAL

Case Statement

Our tradition teaches us to plant trees under which we, ourselves, do not expect to sit.

The Jewish Community Foundation of New Mexico builds and perpetuates support for a vibrant, caring Jewish community. We do this by partnering with donors to support cherished causes and with organizations to develop resources for the future.

The Jewish world we inherited continues to change, yet our families' values remain; they guide us and sustain us. As Jews, we are bound to assist one another and to repair the world – this has been our commitment from generation to generation.

Through the *LIFE & LEGACY™ New Mexico Opportunity Fund* you can foster Jewish engagement and ensure the continuity of our community by helping launch new programs and supporting valued ones. In addition, your contributions to this new endowment fund will enable us to respond collectively to emergencies, both within the Jewish community and beyond.

The future will look different than today, but the need for resources will remain. Join us in securing New Mexico's Jewish future with an enduring investment in our community.

Management Plan

The Legacy Team is comprised of the following people:

Paula Blacher – Chair
Erika Rimson –Staff Representative
Terry Lee Heller
Herb Koffler
Colin Shaw
Vivian Skadron
Andrew Gans

Assistance from: Art Gardenswartz & Ron Segel

All team members will engage in legacy conversations based on their relationships with prospects. They all will send hand-written thank you notes to prospects with whom they meet and make thank you calls to those who commit.

Chair, Paula Blacher will be responsible for implementing plan and managing progress, tracking gifts, documents, and records, submitting quarterly reports and other documentation (along with JCF office), keeping Board of Directors informed of progress at quarterly meetings and interim if necessary, identifying prospects and solicitations.

Staff Representative, Erika Rimson and administrator, Kristen Gurule, will be responsible for working with Paula to track gifts and for writing formal thank you letters for commitments. Erika will present range of gifting option ideas to prospects/donors that they can discuss with their personal financial/estate planning advisors.

Terry Lee Heller, JCF Marketing Committee Chair, will be responsible for working with JCF staff on marketing our programs.

Herb Koffler will be responsible for identifying prospects and solicitation and will oversee stewardship.

Colin Shaw will be responsible for identifying prospects and solicitation.

Vivian Skadron, member of JCF Marketing Committee, will assist Terry Lee with marketing.

Andrew Gans will be responsible for identifying prospects and solicitation as well as working with Chair Art Gardenswartz to provide leadership support.

Not formally on L&L team:

Art Gardenswartz will help identify prospects, assist with solicitations and provide leadership for the process on behalf of JCFNM. **Ron Segel** will help identify prospects and may assist with solicitations.

Target Audiences and Prospects

There are several constituencies that are candidates for participating in our legacy program:

- Persons already directly linked and involved with JCFNM are the most likely supporters.
- JCFNM can help bring Jews who are unaffiliated with congregations and other Jewish organizations into a new connection with the broader community via this effort and new fund that has broad appeal. This includes Jews who no longer live full-time in New Mexico but wish to retain a connection.

Marketing Plan

We will market our Legacy program as part of the broader LIFE & LEGACY effort:

Quarterly letters to DAF & other fund holders: Share idea of making an after-lifetime gift to complement their current charitable giving through JCF; suggest that those who have already created an endowed, designated fund could consider making an after-lifetime gift to the *L&L NM Opportunity Fund*.

Website: Connect to umbrella L&L marketing; include example of needs and stories about how the *L&L NM Opportunity Fund* can help fulfill them

Legacy conversation materials: Incorporate *Opportunity Fund* info. into “Conversation Piece” (created by marketing committee in 2016). Update Legacy Society flyer & “annual report.”

Person to Person: utilize personal connections either one-on-one or via small “parlor meetings” (possible discussion topics: Ethical Wills, Jewish perspective on Individual/Community) targeting “unaffiliated” and/or “disconnected.”

Marketing committee will create a timeline: *build into Implementation Strategy*.

Stewardship and Recognition

Aim for 4 “touches” per year.

- Formal commitment acknowledgement letter from JCF staff & TY call from legacy team member
- Listing on website, “annual report” and signage at annual legacy event
- Receive annual JCFNM update
- Invitation to “special” gathering at private home – educational or social
- Program progress report to “early committers”

Setting Goals

Year 1-Legacy Commitments

Legacy team members	4
Board of Directors (in addition to Legacy Team)	3
Book of Life signers (who haven’t formalized commitment)	3
Affiliated Jewish people who like idea of this fund	2
Unaffiliated Jewish people – ABQ	2
Unaffiliated Jewish people – Santa Fe	2
Current gifts	<u>2</u>
Total anticipated commitments in Year 1	18

Implementation Strategy

Spring 2018

- Legacy Team participates in training & consulting opportunities (March)
- Annual JCF legacy event kicks off LIFE & LEGACY to community
- Legacy Team completes plan & develops prospect list
- Conduct “focus group(s)” in ABQ & Santa Fe among unaffiliated
- Erika, Kristen & Paula begin systems prep
- Marketing committee develops marketing materials
- Legacy Team lead presents to Board
- Legacy conversations begin

Summer 2018

- Legacy Team refines prospect list
- Legacy conversations continue; schedule some parlor meetings for early Fall
- Stewardship activities, as appropriate
- First quarterly report
- Legacy Team lead presents to Board

Fall 2018

- Legacy Team plans & schedules first recognition gathering for Spring 2019
- Legacy Team proposes remaining activities for 2019
- Legacy conversations continue, including parlor meetings
- Stewardship activities, as appropriate
- Second quarterly report

Winter 2018-19

- Legacy conversations continue
- Stewardship activities, as appropriate
- Legacy team lead presents to Board
- Third quarterly report

Spring 2019

- Legacy Team hosts recognition gathering
- Stewardship activities, as appropriate
- Legacy Team begins planning for continuous operations
- Fourth quarterly report