



Legacy Plan

Established in 1971 as a small, grassroots social service organization, CJE was founded on the enduring belief, eloquently expressed by Rabbi Abraham Joshua Heschel, that “the test of a people is how it behaves toward the old.” Four decades later, CJE has grown to be a nationally recognized and innovative health and human services organization that is proactive and responsive to the growing needs of older adults, family members and caregivers.

Guided by CJE’s Jewish values of Respect, Advocacy, Compassion, Intention, Innovation and Accountability, our mission is to facilitate the independence of older adults and to enhance their quality of life in addition to providing an enhanced network of care that offers older adults and their family members a myriad of opportunities for life enrichment, supportive resources, healthcare, research and education. Our diverse healthy aging and eldercare programs support the needs of older individuals- physically, socially, intellectually, culturally and spiritually throughout the aging process; allowing older adults to thrive and “age in place” and address physical and mental health needs, whether short-term or chronic.

Our Legacy donors are a group of individuals who are committed to CJE’s mission of caring for older adults and their loved ones, every day and in a crisis... guiding them through the tangled emotions and issues of aging in a supportive way. By establishing a legacy you will ensure:

- The growing and evolving needs of older adults, family members and care givers are compassionately met;
- Older adults are provided the services they need to live out their final years independently and with dignity;
- Life enrichment, supportive resources, healthcare, and education services are available for future generations;
- Promote and advance Jewish continuity.

Please join us!

Management Plan

- The members of our legacy team are Mark Weiner, CJE President & CEO; Alan Greene, CJE Development Chair; Ken Lorch, CJE Endowment Chair; Allyson Marks Greenfield, Development Director; Jennifer Schnepfer, Sr. Development Specialist. Collectively they will keep our Board of Directors informed of our progress and encourage them to “sell” the program to others.
- The lead person will be Allyson Marks Greenfield, responsible for implementing the legacy plan, tracking gifts, documents and records, submitting LIFE & LEGACY quarterly reports and other documentation.
- Allyson Marks Greenfield and Jennifer Schnepfer, in cooperation with Carole Klein-Alexander, VP Marketing Management, and Mary Keen, Marketing Manager, will be responsible for executing the marketing plan.
- Our entire team, guided by Allyson Marks Greenfield, will be responsible for stewardship and relationship building with our legacy donors.
- Alan Greene, Ken Lorch, Mark Weiner, Allyson Marks Greenfield and Jennifer Schnepfer will keep our Board of Directors informed of our progress.

Target Audiences and Prospects

- Current Board Members
- Past Board Members
- Leadership staff
- Loyal, committed donors with a 10-plus year history of giving
- Long-time volunteers
- Selected family members of agency’s clients
- Will identify major donors who have given 3+ years and schedule face-to-face meetings.

Marketing Plan

- We will use the following tools to market our plan:
 - Article in LIFE magazine – 10,000 distribution
 - Live presentations at Board meetings and leadership staff meetings.
 - Include in Post Script (P.S.) in one or more of our Direct mailings.
 - Marketing table at annual event.
 - Distribute brochures to all major donors at face-to-face meetings and have them located in our lobby levels at Lieberman (skilled nursing building), Weinberg (Assisted living/Memory Care building), and Adult Day Services.
 - Include a check box on our response cards (approximately 75,000 pieces of mail a year).
 - Legacy page on website.
 - Article in Celebrate CJE event ad book.

- Advertise regularly in our newly published Development e-newsletter, include testimonials and a listing once a year.
- Advertise at annual meeting in October.
- Interviews of Legacy donors, to include taped video testimonials to be shared with others on the website (Carole Klein-Alexander, VP Marketing Management, and Mary Keen, Marketing Manager).

Stewardship and Recognition

- Ongoing thank you calls and meetings with Ken Lorch, our Endowment Chair, and Allyson Marks Greenfield.
- We will personally acknowledge donor with call and hand written note mailed within 24-48 hours. The call will come from Ken Lorch, Mark Weiner or Allyson Marks Greenfield/
- Every year we list our legacy gifts in our Annual Report, CJE LIFE Magazine (minimum once a year), and on website
- We will continue to send print cards at Rosh Hashanah, and email cards for Hanukkah, and Passover.
- Currently, we are not expecting to host a special event just for legacy donors. Will consider hosting an event in future.

Setting Goals

<u>Year 1</u>	<u># of Legacy gifts</u>
Major Donors – one-on-one conversations (6-10 conversations)	3
Current Board members – group presentation and one-on-one solicitations	7
Past Board Chairs/Members	3
Leadership staff (group and individual meetings)	4
Direct mail to general donor base	<u>1</u>
Total anticipated gifts in Year 1	18

<u>Year 2</u>	<u># of Legacy gifts</u>
Major and decade long Donors – one-on-one conversations (6-10 conversations)	4
Family members -	3
Current Board members – group presentation and one-on-one solicitations	5
Past Board Chairs/Members	2
Leadership staff (group and individual meetings)	1
Direct mail to general donor base	1
Volunteers	2
Total anticipated gifts in Year 2	18

Implementation Strategy

Goal: Educate and raise awareness as well as solidify a minimum of 18 new legacy gifts each year through the below marketing plan:

- May 2014 – May 2015 - Ongoing meetings with our major donors (2-5 a month), Board members, past Board Chairs and leadership staff.
- May 2014/May 2015- presentation at the Operations Meeting (Leadership staff) and directly ask for commitments. Face-to-face follow-up meetings with staff and Allyson Marks Greenfield
- May 2014/May 2015 – Presentation at Board meeting, ask directly for commitments. Schedule face-to-face follow-up meetings with Ken Lorch (Endowment Chair) and Allyson Marks Greenfield and Board members.
- June 2014/June 2015 – ongoing face-to-face meetings, article published by our two lay team members in our CJE LIFE Quarterly magazine about the program and the importance of making your legacy gift.
- June 2014/June 2015 – ongoing face-to-face meetings, direct mailing will include a P.S. about legacy program.
- September 2014/September 2015 – ongoing face-to-face meetings, advertise from podium and marketing table at our Annual Celebrate CJE event
- September 2014/September 2015 – Will include an advertisement (and list names of those who have supported program) in our CJE LIFE quarterly magazine.
- October 2014/October 2015 – Advertise all endowment gifts in our Annual Report, Recognize at annual meeting
- December 2014/December 2015 – ongoing face-to-face meetings, incorporate into our winter direct mailing
- February 2015/February 2016 – ongoing face-to-face meetings, article/highlights in CJE LIFE Magazine