



Congregation Beth Shalom
Create a Jewish Legacy Action Plan
Revised 2.22.15



Case Statement

Congregation Beth Shalom has a unique and special role. This is where we mark the most profound events in our lives as we celebrate and mourn with one another...where we find friendship, camaraderie, support and understanding. As a community, our Jewish “souls” live at Congregation Beth Shalom...it is where we find strength as a community, where we pray as a community and become holy as Jews.

As we have always been, our congregation is committed to the worship of God, the ideals and precepts of Torah and inspiring meaningful study and lifelong learning. We are a welcoming Jewish community that promotes the observance of sacred times, the celebration of life cycle events, the perpetuation of the State of Israel and acts of loving kindness that expand well beyond our walls. These are the values and beliefs that guide our congregation as we serve the spiritual and social needs of our members and work make the world a better place.

Our Legacy donors are members, like you, who are making a promise to our children, grandchildren and generations to come that they will have a thriving Jewish community to embrace and enrich their lives as Jews. They acknowledge the value, importance and centrality of our synagogue in the lives of our congregants and choose to join in creating a legacy to ensure its future.

Demonstrate your love, devotion and connection to our congregation, our community and our future by making a Legacy gift today!

Management Plan

Legacy Team Officer(s):

Seth Bloom and others pending

- Oversee and ensure plans are implemented, progress is monitored, all are fulfilling responsibilities
- Communicate with team and leadership
- Schedule and preside over regularly scheduled Legacy Team meetings.
- 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.

Legacy Team Champions:

Sam Nussbaum (Executive Director)

- Track gifts and maintain documents and records
- Submit quarterly reports to Life & Legacy and other required documentation
- Oversee implementation of legacy program marketing and identification of marketing opportunities to the congregation
- Help and support coordination of all events to cultivate and recognize legacy prospects and donors

Pete Hazen, Ralph Downard and others pending

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

Target Audience(s)

- Board and committee members
- Past presidents and congregational leaders
- Long time, consistent donors (regardless of amount)
- Multigenerational families associated with CBS
- Longstanding donors and volunteers of 7+ years
- Descendants of founding families who may not be associated with CBS now
- 55+ years of age congregants not included in above
- Congregants on specials and those receiving other financial arrangements...they can't give now but can make arrangements for gifts in the future
- Auxiliaries/groups to speak/present to:
 - Men's Club
 - Sisterhood
 - Past Presidents
 - Hebrew School families
 - Board members
 - Minyanaires
 - Contributory members
 - B'nai Mitzvah families

Marketing Plan

Newsletter (Bi-monthly)

- Profile/testimonial from different donor each issue with contact information included
- On-going list of members to date with highlight of new members since last issue
- Separate “ad” for Create a Jewish Legacy in each issue (same ad each time)
- Always direct to website or brochure available at synagogue or by mail (offer to send) for more information

Shabbat Bulletin and weekly e-blasts

- Standard blurb in every issue and email with message “Create YOUR Jewish Legacy today by remembering CBS in your will or estate plan”
- Call _____ for more information” along with logo .
- Always direct to website or brochure available at synagogue or by mail (offer to send) for more information

Website

- Prominent “ad” on home page with link to dedicated page featuring contents of brochure and a single contact listed for more information and/or confidential discussion. Also offer professional assistance with codicil drafting and/or advice on including provisions in estate/will.

Social Media (Facebook, Instagram and Twitter?)

- Feature monthly post with some interesting statistic about Planned Giving (for every 10 planned gifts made, an organization will realize \$ _____ over ___ years) or story (some lore like the founding of Stanford University Endowment with post saying something like “Why it’s a good idea to treat everyone like they want to give you a million dollars” or “You won’t believe the surprise that left everyone at _____ University speechless”)
- Post an announcement for every new member (with their permission) and a short quote of why they made the commitment and/or what CBS means to them.
- Invite those Legacy Society members active/comfortable on FB to comment, share and “like” any legacy society/planned giving related posts

Marketing Materials

- Lobby Poster
- Brochure
- Power Point Presentation

Create a Jewish Legacy Kick-Off Blitz

- Direct Mail piece including a message from Legacy Officer(s) and Team (all sign) and brochure
- Email Blast including message from Legacy Officer(s) and Team (all to sign) and link to website page

Stewardship & Recognition (minimum of 4 touches/year)

- When a member signs a letter of intent...they will receive a hand written thank you note from solicitor and a phone call from the president.
- Members of Legacy Society will be listed in every issue of Kol Shalom (bi-monthly newsletter), on website and letterhead created for Legacy Society communications
- Each year there will be one Legacy Member recognition event such as:
 - Invitation only “pre” event for a synagogue wide event or program
 - Event/dinner at the home of a congregant
 - Special outing or program somewhere other than the synagogue
- Consider some recognition display in the synagogue listing those who have joined the legacy society by signing a letter of intent.
- Consider creating some gift item (Kiddush cup, etc.) for congregants who join the Legacy Society. It could simply say “Legacy Society of CBS” or it could say “Creator of our Jewish Legacy” or something else. A memento and on-going reminder of their commitment.



Setting Goals

Year 1 - 2015	Group Presentation	1-on-1 Conversation	Legacy Gift LOIs
Board of Directors	1	10	5
Past Presidents	1	5	4
Multigenerational Families & Descendants		5	3
Sisterhood & Men's Club	1	10	3
Direct Mail to congregation			3
Totals:	3	30	18

Year 2 - 2016	Group Presentation	1-on-1 Conversation	Legacy Gift LOIs
Board of Directors	1	4	3
Long term, consistent donors (regardless of amount)	1	8	3
Multigenerational Families & Descendants		3	2
Sisterhood & Men's Club	1	5	3
Hebrew School Families	1	10	5
Direct Mail to congregation			3
Totals:	4	30	18

Total # of Legacy Gifts 2015-2016: 36

Plan Implementation

Timeline	Activity
Feb/Mar 2015	<ul style="list-style-type: none"> ➤ Finalize Legacy Team ➤ Finalize Stewardship and Recognition program and procedures ➤ Prepare ads, brochure (case, ways of giving, giving policy, LOI, etc.), lobby poster, Website content, PowerPoint Presentation including a library of testimonials of members (written, video and a photo) for future use. ➤ Legacy Team to prepare and provide standard talking points/announcement verbiage to Clergy, Leadership etc. ➤ “Conversation” Training for Legacy Planning Team
April 2015	<ul style="list-style-type: none"> ➤ Send Kick-Off Blitz Mailing to entire congregation in advance of Kol Shalom to include letter/message, brochure, LOI. ➤ Announce program and goal at all services and events and have blitz packages (brochure, letter, etc.) available throughout building. ➤ Launch Social Media campaign with introductory posts on CBS, Men’s Club and Sisterhood FB pages. Encourage Legacy Society members to share, comment and like. ➤ Hold Group Presentation(s) to Board and Past Presidents ➤ Have 4 one-on-one conversations
May 2015	<ul style="list-style-type: none"> ➤ Feature testimonial of one Legacy Society member, message from Legacy Team and listing of members in May issue of Kol Shalom along with a standard ad (to appear in every issue) and contact info ➤ Begin featuring ad/contact info in every Shabbat Bulletin and eblast as appropriate and continue indefinitely ➤ Have 4 one-on-one conversations ➤ Hold Group Presentation(s) for \$1000+ donors to annual fund and Contributory members ➤ Marketing Training
June-Aug. 2015	<ul style="list-style-type: none"> ➤ Submit 1st Quarter Reports to CJL manager ➤ Have 12 one-on-one conversations
Sept. 2015	<ul style="list-style-type: none"> ➤ Stewardship Training ➤ Based upon Legacy Team recommendations to HH Committee, clergy and leadership to communicate impactful and coordinated message about program and recognize Legacy Society members during HH observance in a meaningful way ➤ Have 4 one-on-one conversations ➤ Submit 2nd Quarter Reports to CJL manager
Oct. –Dec 2015	<ul style="list-style-type: none"> ➤ Hold Group Presentation(s) to Men’s Club and Sisterhood ➤ Have 11 one-on-one conversations ➤ Hold 1st Stewardship & Recognition Event for Legacy Society Members ➤ Submit 3rd Quarter Reports to CJL manager