

Legacy Plan—May 2018

Case statement:

HaMakom is a progressive, egalitarian Jewish community that nourishes heart, mind, and spirit. At HaMakom we honor both tradition and renewal, heart-opening music, learning in community, and tikkun olam—compassion in action. Inclusion and diversity are core values at HaMakom; like the tent of Abraham and Sarah, our door is open. All are welcome here.

Through deep and joyful Jewish practice, participants weave together a beautiful community tapestry. Santa Fe’s Jewish population is home to many who live far from the households they might traditionally have visited for Passover seder, the High Holy Days, or Jewish life-cycle events. In this spirited community, we come together to mark the cycle of the Jewish year, nosh, study Torah, learn, debate issues, and share differing perspectives on how traditional texts relate to our modern lives. Worship services are intimate and engaging. Empowerment is built into our very structure, where an inclusive seating arrangement allows for dialogue and sharing during services. Each individual is treasured for what they bring; the diversity and range of Jewish belief and practice make HaMakom gatherings a laboratory of living Judaism.

Our legacy donors are community members like you who are committed to a vibrant, progressive Jewish presence in Santa Fe. HaMakom supporters are passionate about the need for a joyous, flexible, and participatory approach to Judaism—an approach that respects the beauty and wisdom of our ancestral tradition and connection to the land of Israel, integrated into the contemporary world.

HaMakom means “The Place.” Help ensure that this place—*our* beloved place—is part of the Jewish landscape in New Mexico for years to come. Show your gratitude to our spiritual home; join with us to secure a strong Jewish future by making a legacy gift to HaMakom today.

Management strategy:

Legacy team member	Role
Ken Perlow	Legacy team leader
Deborah Avren	Scheduling donor conversations
Ken Perlow	Record keeping (tracking gifts)
Cindy Freedman	Marketing plan leader
Beverly Post	Stewardship plan leader
Deborah Avren	Event and follow-up coordinator
Deborah Avren	Board liaison
Darryl Giddings, Deborah Avren, Beverly Post	Conversations

Target audience/prospects:

- 1) Legacy team
- 2) Founding members
- 3) Activity coordinators (Continuing education, Hineni, &c.)
- 4) Past/present board members
- 5) Other congregation members
- 6) “Diaspora members” (no longer in town) / former members

Marketing/Education about Life & Legacy:

- 1) Coordination
 - a) Event planning
 - i) Introduction and buzz event at 1st night seder (3/30)
 - ii) Legacy intro with snacks at May Continuing Ed. event
 - iii) Cocktail party by invitation (summer?)
 - b) Conversation planning
 - i) Identify most likely donors to prioritize meetings (ongoing)
 - ii) Generate talking points (with L&L coaches)
- 2) Communication
 - a) Trade-show banner at shul (early April)
 - b) Announcement in Weekly Reader email (starting in April)
 - c) Announcements at Shabbat/Oneg (starting in April)
 - d) Info on website (beginning in April)
 - e) Special brochure (8.5x11 3-fold) designed and available at shul (at High Holidays)
 - f) Life and Legacy “tagline” on weekly e-blasts and other communications
- 3) Follow-up
 - a) Conversations with identified Legacy donors to record commitments
 - b) Testimonials from donors
 - i) Written: sharing stories/testimonials from HaMakom Legacy donors
 - c) Special honors
 - i) Annual event (cocktail party?)
 - ii) Acknowledgements in congregational communications

Stewardship:

- 1) Immediately follow-up
 - a) With personal thank-you phone call from Board President (or other board member)
 - b) Thank-you note from Stewardship team leader
- 2) Longer term follow-up:
 - a) List/recognize Legacy donors on website, at annual meeting, and at large congregational gatherings.
 - b) Annual special gathering for Legacy donors (party? Social event at Rabbi’s house?); and at annual Jewish Community Foundation event in Albuquerque
 - c) Special holiday or other occasion mailing to donors 2-3 times per year. (Rosh HaShanah, Chanukah, Passover, birthday, anniversary, etc.)
- 3) Coordination: Legacy Team members plan and coordinate, winter 2018.

- 4) Communication: announce Legacy program to entire community and create some “buzz”, kick-off in spring 2018, to continue throughout the year. This will be done through:
 - a) On HaMakom website
 - b) Banner in the weekly e-blast reader
 - c) Stand-alone Legacy brochure/tri-fold/literature
 - d) Announcements at Shabbat/All holidays and gatherings.
- 5) Events
 - a) Kick-off: before regularly-scheduled Continuing Education event in April
 - b) By-invitation cocktail party for prospective Legacy donors
- 6) Testimonials
 - a) Include written excerpts on donor page on HaMakom website, on targeted Legacy literature, and in updated HaMakom brochure (next time it’s updated)

Goals:

1. First Year:
 - Team Members: 5
 - Board members: 3
 - Founding members or past board members: 4
 - General congregational members: 6
2. Second Year:
 - Board members: 3
 - “Diaspora” members: 4
 - General congregational members: 11

Implementation checklist:

Spring 2018

- Legacy Announcement and Kick-Off: Deborah/Cindy/Beverly/Ken at Pesach seder
- Announcements at services, events: Deborah
- E-blast announcements: Cindy/Beverly
- Marketing plan: Cindy/Beverly work on draft
- Stewardship plan: Deborah/Beverly work on draft
- Marketing: by invitation cocktail party to introduce Life & Legacy to likely candidates: Deborah
- Track gifts, keep track of who has been contacted from master prospect list: Ken

Summer 2018

- Attend Life and Legacy conference: Beverly/Deborah
- Schedule first round of conversations: Deborah, Beverly, Darryl Giddings; assign & schedule 4 conversations
- Marketing/stewardship: feature testimonial or tips/info in HaMakom weekly e-blast (Cindy/Beverly, maybe Arlene G can help write)
- Marketing: piggy-back on another Continuing Ed event? Deborah
- Track gifts: Ken
- Stewardship: print blank thank-you cards with HaMakom logo on front, Cindy

Fall 2018

- Dedicated Life and Legacy brochure/tri-fold available at High Holiday services: Cindy, Beverly (maybe Arlene can help?)
- Stewardship/Marketing: List of Legacy donors with High Holiday materials/at services? Cindy/Ken
- Conversations: Deborah, Beverly, Darryl Giddings (maybe we can bring someone else on board, too); assign & schedule 6 conversations
- Track gifts: Ken

Winter 2018

- Conversations: Deborah, Beverly, Darryl Giddings
- Stewardship (on-going): immediate thank you calls to donors (Deborah); thank you notes (Beverly)
- Stewardship: small thank-you token for Legacy donors: (HaMakom key chain, or something small?): Cindy/Ken
- Marketing: piggy-back on another Continuing Ed event: Deborah
- Track gifts: Ken