

Life and Legacy
Sustainability Legacy Circle
Temple Beth-El

Mission and Purpose Statement

Temple Beth-El is committed to nurturing growing relationships with Judaism and community to help individuals and families thrive spiritually, intellectually and emotionally, and to inspire them to build a more compassionate, just and peaceful world. We achieve this mission through providing Jewish learning; opening access to religious services, life cycle observances, social and cultural programming, community service and social action opportunities; and offering pastoral care and spiritual guidance for those in need across the Metropolitan Richmond area.

Case Statement

Since 1932 Temple Beth-El has grown from a small group of families who wanted a warm, open, welcoming synagogue that combined tradition with modernity to our multi-faceted house of dynamic participatory worship that invites Jewish communal life in an inclusive and inviting atmosphere. Members of all ages and backgrounds join together in making worship and study meaningful, relevant, and inspiring for all those participating. We are committed to *tikkun olam* and social activism, offering a variety of social, cultural, and educational events, thereby making Temple Beth-El a vibrant community for all ages. We offer both the tradition of our commitment to Judaism and relevant spiritual growth. We remain a supportive family of families.

Our legacy donors are individuals just like you who want to ensure that Temple Beth-El continues to provide an environment that nurtures growing relationships with Judaism and community to help individuals and families thrive intellectually, emotionally and spiritually and inspire

them to build a more compassionate, just and peaceful world. Please join us!

Management Plan

Our core committee of seven, listed below with plan responsibilities, supplemented by the Temple Beth-El staff, with the assistance of the Richmond Jewish Foundation, will create, develop, and implement the Temple Beth-El Life and Legacy Plan.

Life and Legacy Team

Frances Goldman (Point Person) - Life & Legacy Plan Creation, Development, Review and Implementation. "Make the ask" with 2-4 historical donors.

Judy Crocker - Life & Legacy Plan Creation, Development, Review, and Communication of Marketing Plan for creation to Krista Fidlow and Norma Fiedler. "Make the ask" with 2-4 historical donors.

Ron Felmus - Lead Plan Implementation with Board of Governors and initial "make the ask" with 2-4 historical donors.

Franklin Wolf - Recognition and Stewardship Leader. "Make the ask" with 2-4 historical donors.

President Ben Lewis - Life and Legacy Communication Leader to the congregation. "Make the ask" with 2-4 historical donors.

Rabbi Michael Knopf - Life and Legacy Process support

Executive Director - Support Marketing Plan, Recognition and Stewardship Leader, track donor gifts, compile and submit quarterly reports to Life and Legacy Chair and RJF

Identify and Describe Prospects

Board of Governors

Founding TBE Families

Current and Past Annual Patrons

Past Temple, Men's Club and Sisterhood Presidents

Sisterhood

Men's Club

School Leadership

Longtime Volunteers

Current and Future B&B Parents

Congregants at Senior Living Facilities

Marketing Plan

- Target groups and individuals to be marketed listed in prospects section
- Communication Vehicles to include:
 - Create a life and legacy brochure including testimonials with pictures and quotes
 - Advertise on temple website and social media websites including a link to Life and Legacy Information
 - Integrate in monthly bulletins and weekly Shabbat programs and profile a donor several times a year and why they decided to leave a legacy
 - Schedule bi-monthly blast e-mails including donor profile, link to brochure, (schedule to respect other annual fundraising programs)
 - Speak with various temple groups and one on one individuals about Life and Legacy and deliver brochure handouts

- Rebrand printed temple stationary to include “Remember Temple Beth-El and the Jewish Community in your will, estate plan, and by beneficiary designation.”
- Direct Mail in conjunction with another scheduled mailing once yearly
- Posters for marketing at high attendance events.

Recognition and Stewardship

- ✓ Make a personal thank you call within 2 days of receiving a legacy intent.
- ✓ Create and send out a thank you letter to those individuals who notify us of their intent to leave a bequest or other planned gift within two days of notice.
- ✓ Create a Legacy Sustainability newsletter to be mailed yearly to all Congregants honoring those who have notified us of their Legacy intent and communicating how their donation is making a difference in our community, either within or outside of TBE.
- ✓ Recognize and honor Legacy members at the annual meeting.
- ✓ Invitation to Legacy members only event.

Setting Goals

One of our primary goals is to reach out to all our Congregants and their extended families to help them establish a design during their lifetimes to launch a plan that will have a lasting impact on the continuity of Temple Beth-El and the Jewish people, in a way that is meaningful and significant to each person or family. To do this, the committee and its extended members will use legacy conversations to reach a minimum of 18 donors in each of years one and two, with the goal of continuing that outreach from years three and on.

Legacy Plan Implementation

May 1, 2016 - Life and Legacy “Kick-off” conversation by the President to the congregation at the Annual Meeting.

May 17, 2016 - Life and Legacy Plan finalization by committee for submission to RJF.

May 20, 2016 - Life and Legacy Plan submission to RJF

May 24, 2016 - Life and Legacy Plan Presentation to Temple Beth-El Endowment Committee

May 31, 2016- Goal: 2 legacy donor intents

June 1, 2016 - HHD Marketing Webinar - Frances and Judy

June 6, 2016 - Life and Legacy Donor Plans due from L&L Committee

Goal: 2 Legacy donor intents

June 7, 2016 - Begin compilation of donor legacy intents, bequests for quarterly reports.

June 8, 2016 - Initial recognition and stewardship contacts made by thank you calls, thank you letter. Start planning recognition and stewardship success event for end of year 1 (March, April or May 2017).

June 9, 2016 - Life and Legacy Plan Presentation to Temple Beth-El Board of Governors. “Make an open group ask” to meet with any committee member to meet one on one at their convenience for additional information and to “make the personal ask”.

June 15, 2016 - Committee meeting to discuss first impressions, what is working, not working, initial changes to presentation. Number of one on one conversations scheduled from board meeting. List next 2 prospects.

Goal: 2 Legacy donor intents

June 15, 2016 – Meet with Krista Fidlow, media specialist at TBE and TBE Executive Director to begin advertising on temple website, social media websites, including links to Life and Legacy information. Create a Life and Legacy Logo for inclusion in bulletins, newsletters, Shabbat programs, Create a life and legacy brochure with testimonials and pictures and quotes.

June 28, 2016 – Submit quarterly report of legacy donor intents and bequests to RJF

July 20, 2016 – Send out bi-monthly e-mail blast with donor profile, link to brochure

August 17, 2016 – L&L Committee Meeting to create mini-lists of next donor prospects. Discuss how to market during High Holidays (donor list poster, brochures in pews,)

September 14, 2016- Meet with Men’s Club to give L&L presentation. Make “the ask” for meeting one on one.

September 15, 2016 – Scheduled E-mail blast

Goal: 2 legacy donor intents

September 28, 2016 – Submit quarterly legacy donor intent report to RJF

October 3, 4, 2016 – HHD Marketing and L&L Plan Pitch from the bimah.

October 19, 2016 – L&L Committee Meeting to update “make the ask” list, volunteer members to make the ask, progress report on marketing, donor intents.

Goal: 2 Legacy donor intents

November 1 -Meet with Sisterhood to give L&L presentation. Make the ask for meeting one on one.

November 16, 2016 - L&L Committee Meeting to update make the ask list, volunteer members to make the ask, update on recognition and stewardship

Goal: 2 Legacy donor intents

December 14, 2016- L&L Committee Meeting to update make the ask list from Current and Past Annual Patrons, volunteer members to make the ask, review 8 month progress.

Goal: 2 Legacy donor intents

December 21, 2016-Submit quarterly Legacy donor intent report to RJF

January 18, 2017 - L&L Committee Meeting, Refocus, Add New Members? Next Steps. Create next make the ask list from Past Temple Presidents with volunteers.

Goal: 2 Legacy donor intents

February 15, 2017 - L&L Committee Meeting, create next make the ask list from Past Sisterhood Presidents with volunteers. Review marketing techniques, make improvements.

Goal: 2 Legacy donor intents

March 7, 2017- Create a Legacy sustainability newsletter honoring those who have committed to be a donor Legacy intent including how there legacies will impact our community and mail to the congregation.

March 28, 2017 - Submit quarterly Legacy donor intent report to RJF

March or April 2017 -Hold Legacy Donors Event Only- Year 1 Success!

May 2017 - Recognize Legacy Donors at The Annual Meeting.