



LIVE ON
BUILD YOUR JEWISH LEGACY

November 1, 2005

*Leadership Team Orientation
and Training Session*



An initiative to support Jewish community organizations

600 South Cherry Street, Suite 1200 Denver, CO 80246-1712 tel: 303.398.7400 fax: 303.398.7430 rcfdenver.org



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Goals

- Strengthen 28 Jewish organizations by helping them build endowment through bequests
- Develop institutions' skills by training staff and volunteer leaders how to cultivate secure gifts through bequests
- Make charitable bequests and other planned gifts an integral part of Jewish philanthropy
- Capitalize on the largest intergenerational transfer of wealth in the history of the country



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About the Program

- Leadership teams
- Results-oriented
- 2 year curriculum
- Training, consulting, coaching
- Incentive grants
- Donor awareness campaign
- Inside-out campaign: you → your boards → your donors



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Participating Organizations

- All six Jewish day schools and Colorado Agency for Jewish Education
- Eight synagogues
- Three local chapters of national organizations
- Seven outreach, housing and human service agencies
- Jewish Community Foundation
- Two University of Denver departments



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Together you have 861 board members

861 x \$50,000 average bequest = \$43 million



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Role of Rose Community Foundation

- Develop curriculum to meet emerging needs
- Provide incentive grants
- Offer group and individual training seminars
- Conduct a donor awareness and marketing campaign
- Provide expert consultants and coaching
- Tally bequest totals and inform Jewish community about the group successes
- Fundraising advise
- Endowment fund stewardship
- Our staff is here to help you: Shawna Friedman and Carolyn Schaefer Wollard



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Role of Leadership Teams

- Commit to learn and attend required training seminars and participate when possible in other sessions
- Create a bequest plan using *Live On* outline provided
- Implement the plan
- Actively solicit each other, your board and donors for bequests and other estate gifts for endowment
- Be willing to share the pie – 54% of donors make bequests to more than 1 organization (average is 5)
- Create an endowment and policies
- Lead by making a bequest yourself, if you've already made one, disclose it and notify charities
- Keep us informed and report progress
- Teams must include executive director, senior rabbi, and a board member



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Role of Jewish Community Foundation

- Provides vetted list of professional advisors and helps match your donors' needs with their list
- Helps communicate about *Live On* to professional advisory community
- Endowment Stewardship
- Book of Life available to donors of agencies with endowments held at Jewish Community Foundation
- One of participating grantees who will solicit bequests for their endowment



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Why Bequests, Why Now?

Big, growing and untapped market

- Only 8% of people with a will have made a charitable bequest.
- Only 13% of affluent Jews have made a bequest.
- Donor awareness is growing and their willingness to consider a bequest is growing. 35% of surveyed donors said they would make a bequest if asked.
- Average age of baby boomers is 50 – most donors added their first charitable bequest to their wills at 49.



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Why Bequests, Why Now?

- At least \$41 trillion is estimated to be transferred via estates in the next 50 years -- \$6 trillion to charity
- Bequest giving doubled between 1995 and 2000
- Bequest giving totaled \$19.8 billion in 2004

GIVING BY BEQUEST, 1963–2003

(\$ in Billions)



Source: Giving USA Foundation TM – AAFRC Trust for Philanthropy/ *Giving USA 2004*



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10 Reasons to Promote Bequests

- Bequests are easy to make and 80% of affluent Jews already have wills, compared with 42% of Americans.
- Donor doesn't have to give up assets during life.
- Anyone can make a bequest – you don't have to be rich.
- Bequests can come from unexpected sources – 25% of bequests come from people unknown to the charity.
- Bequests are cost-effective to market.



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10 Reasons to Promote Bequests

- Promoting bequests is a service to donors.
- Promoting bequests establishes a pool of planned giving prospects.
- Donors need to be reminded.
- The competition is promoting bequests.
- The potential is enormous.



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Live On Guiding Values

1. Treat each other and donors with respect, everyone is Tzelim Elokim, a person created in G-d's image.
2. Consider the well-being, interests and privacy of the donor first. Adopt a donor-centered approach.
3. Earn trust by keeping donor conversations in confidence and avoid lashon hara (gossip).
4. Be good listeners, responsive and inclusive.
5. Commit to all meetings and full participation.
6. Strive for the betterment of the Jewish community.



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Live On Donor Awareness and Education Campaign

Goals

- Conduct a high-visibility campaign within the Jewish community to educate donors about the importance of bequests and other estate gifts and urge them to take action.
- Support you in developing effective marketing materials for your bequest campaigns.



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Target Audiences

- Members, leaders, donors and clients of all 28 organizations
- Denver/Boulder Jewish community
- Professional advisors



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Strategies

- Media relations about milestones
- Direct mail to all our mailing lists combined and purged of duplicates
- *Live On* Website
- Ads and donor testimonials in Intermountain Jewish News
- Direct mail to professional advisors

For individual organizations

- Seminar on communications
- Customized bequest materials and ads
- Consulting help to improve your bequest marketing and communications



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Live On: Build Your Jewish Legacy is a two-year (2005-2007) initiative supported by Rose Community Foundation to teach 28 Jewish schools, agencies and synagogues – and their leaders how to raise endowment through estate gifts. It is a multi-faceted program that includes seminars, incentive grants, one-on-one consultation and a donor awareness and recognition campaign.

www.LiveOnLegacy.org



An initiative to support Jewish community organizations

303.398.7405



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Using the Donor Record for Bequests and Other Planned Gifts

- How to use this form
- Try it – solicit each other
- Suggest improvements
- Keep it in your donor records
- Submit to Rose Community Foundation
- Call us – we want to share in your success!



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Upcoming Training Sessions

2005

Optional learning opportunity

- December 6, 2005 *Communication is Everything – Everything is Communication*

2006

Mandatory Training Sessions

- February 8, 2006 *Asking for the Gift and Designing Your Bequest Plan*
- Fall Training – to be announced

Optional Training Opportunities

- January 18, 2006 *Case Study: Shalom Park's Le'Atid Endowment Campaign*
- March 9, 2006 *Peer-to-Peer Solicitation Training* with Dr. Art and Irit Waldbaum
- March 7 and 8 or April 4 and 5 consultation about your bequest plan with Gail Littman



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Homework Assignment

- Decide how to manage and staff *Live On*
- Solicit team members and make a bequest or other estate gift
- Read bequest plan template in binder
- Integrate bequest messages into your communications materials
- Give a presentation to your Board on *Live On*



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Building Bequests Through Donor-Centered Fundraising Featuring Penelope Burk