



Marketing and Stewardship: Simple Strategies to be More Effective

February 18, 2021

Agenda



Marketing and Stewardship go hand in hand



Marketing Strategies



Importance of Stewardship



Examples

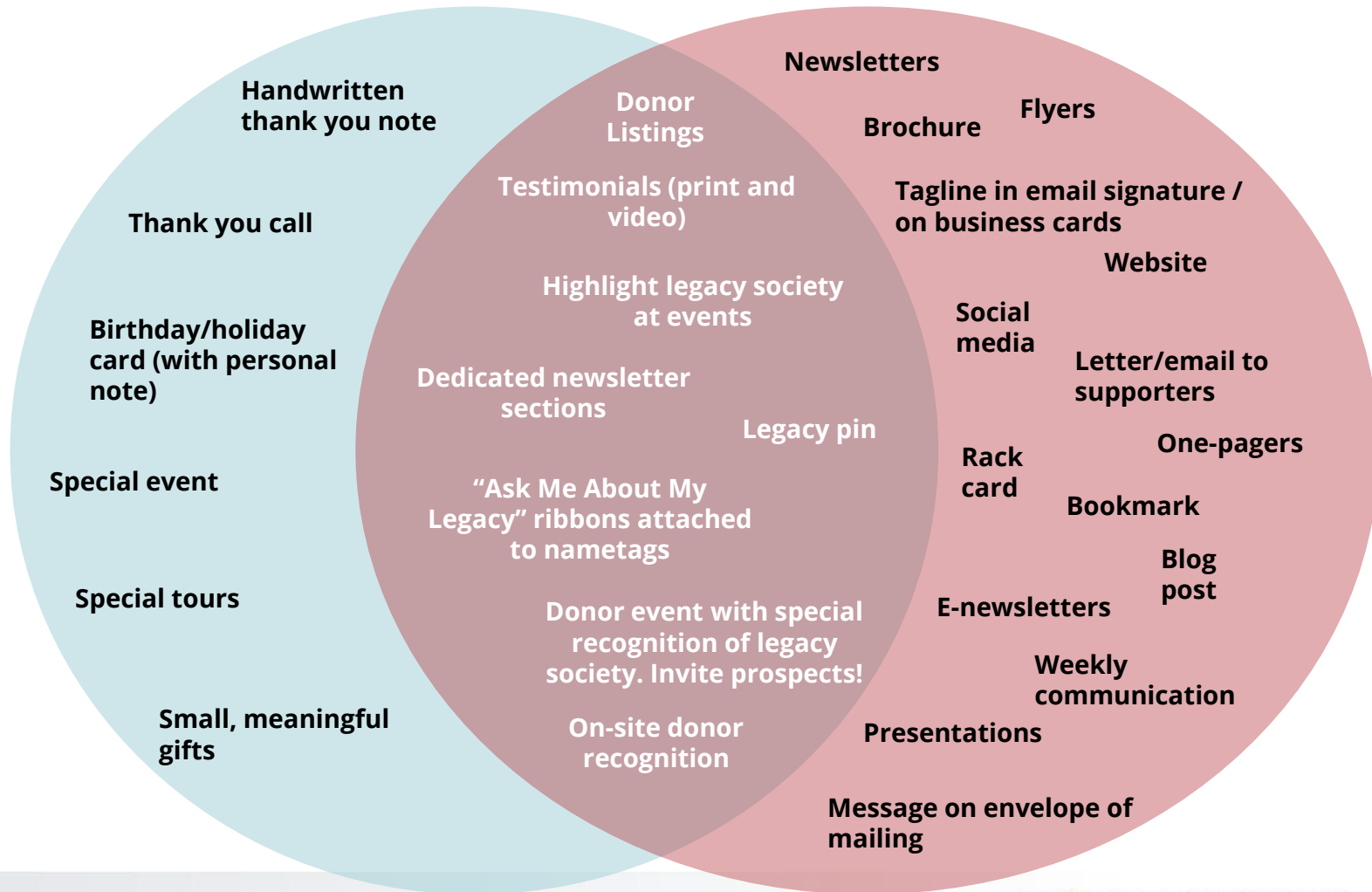


Breakout Rooms- Pay attention to win!

Marketing and Stewardship



Stewardship + Marketing



Marketing



Endowment
Fund

Legacy
Society

Planned
Giving

Marketing: Endowment and Legacy

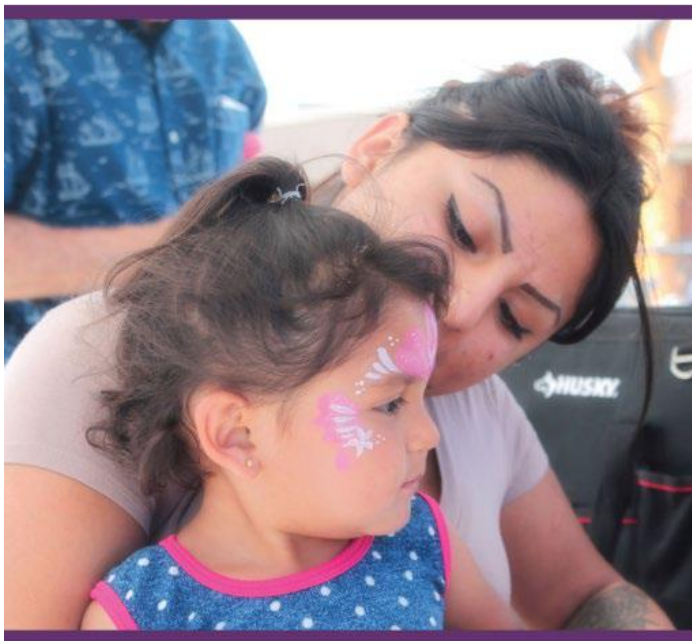


DOROTHA HOGUE ENDOWMENT FUND

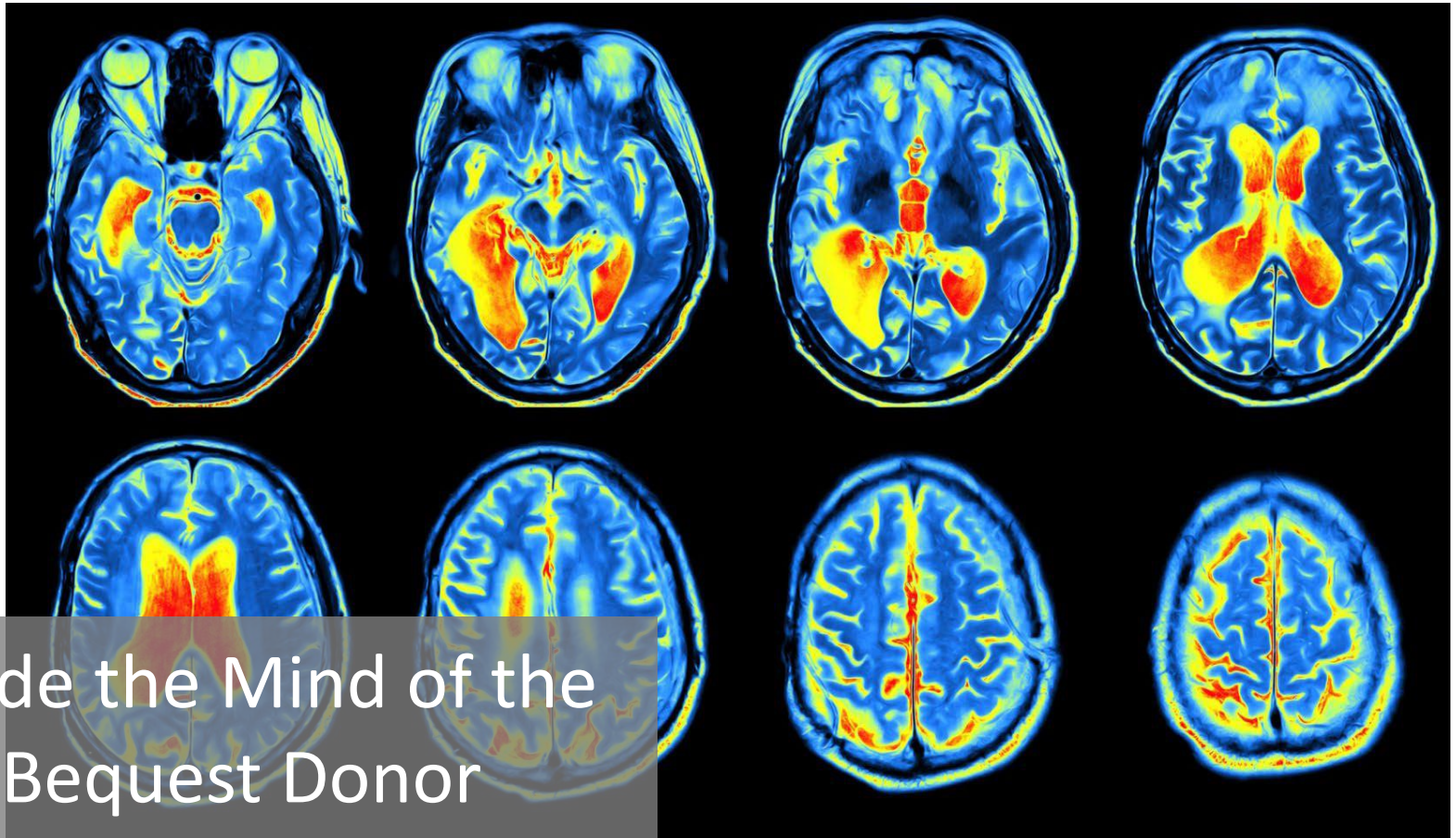
Established in 2017 to celebrate our 125th Anniversary, the Dorotha Hogue Endowment Fund proudly honors Dorotha Hogue, who pioneered the current Florence Crittenton Services program model and was the first Denver Public School teacher at Florence Crittenton. In 1984, she worked with Debbie Gilboy Corley, a social worker, to transition the organization from a residential home for unwed, pregnant women to our current model – a public-private partnership between Denver Public Schools and Florence Crittenton Services that provides education and comprehensive wrap-around support services to teen mothers and their children. This endowment not only respects our history and commitment to serving young women and their children, but also will provide the financial security to ensure we continue to support teen mothers and their children for generations to come.

FLORENCE CRITTENTON SERVICES 125 LEGACY CIRCLE

All who make a current or planned gift to the Dorotha Hogue Endowment Fund will become a member of the Florence Crittenton Services 125 Legacy Circle. Founded during our 125th year of service in Denver (1893-2018), the Legacy Circle honors those that have made Florence Crittenton Services the organization it is today and those that have committed to its future.



Marketing: Strategies

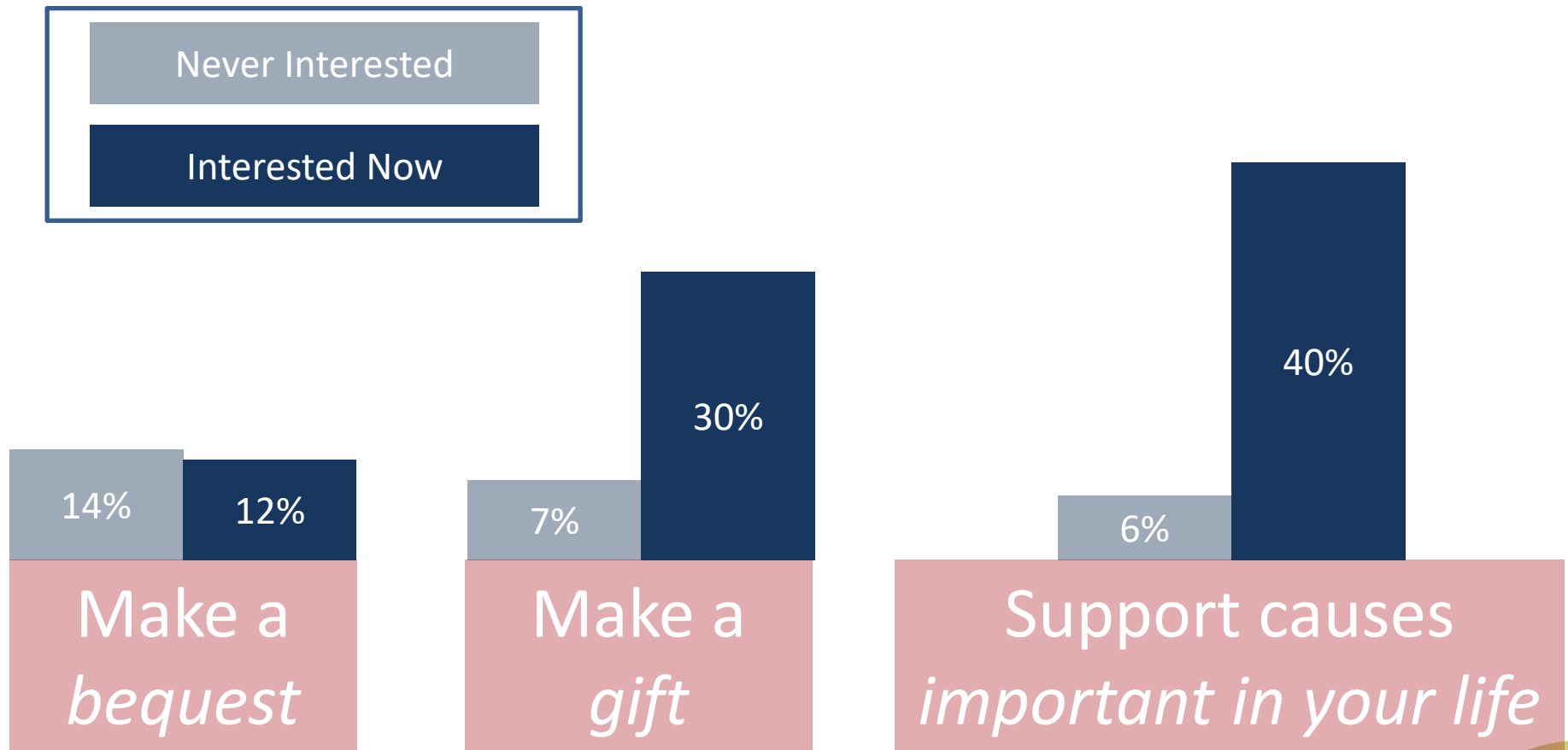


Inside the Mind of the
Bequest Donor

Marketing: Personal Connection



Marketing: Personal Connection



Marketing: Social Connections



Marketing: Social Connections

25% ↑

To “honor a friend or family member by making a memorial gift to charity in my last will & testament”

☒ **YES, I want to leave a personal legacy in the fight against cancer and other serious illnesses.**

☐ I have already included City of Hope in my will, as a beneficiary of a retirement account or other plans.

☐ I wish to remain anonymous.

My gift is in ☐ honor of ☐ memory of _____

Relationship: _____

☐ I have included NIF in my will or trust, as a beneficiary of a retirement account or other planned gift.

My gift is in ☐ honor of ☐ memory of: _____

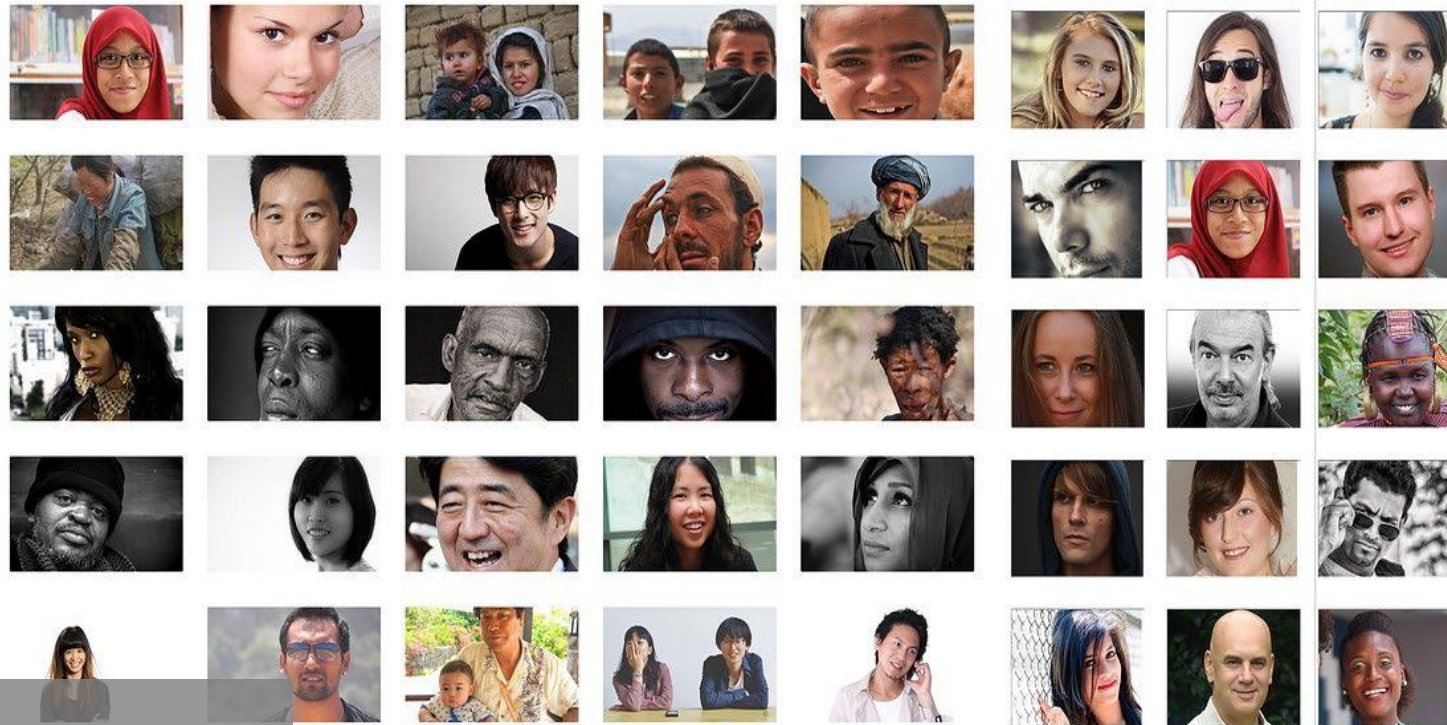
Relationship: _____

☐ I wish to remain anonymous.



Marketing: Connect through stories

40 for 40



Living Donor Stories

Marketing: Stories

SUMMER 2017



THE VILLAGER



Why have you chosen to include Warren Village in your estate plans?

Not only is this an excellent way to further my Mom's legacy (and to remember her by), but it's a meaningful and measurable way for me to help my local community become a better place. I contribute to national and international charities as well, but we should all remember that we also need to focus on organizations close to home.

BUILDING A FAMILY LEGACY

A CONVERSATION WITH THERESA KOLLATH

When and how did you learn about Warren Village?

My Mom, Melody Kollath, became involved with Warren Village in the mid-1980s. I honestly don't recall how she got involved, but she was always on the watch for community outreach opportunities, and ways that she could use her financial knowledge and skills for the benefit of others.

I remember how excited my Mom was to be such an active participant, and how proud she was to be selected as the Board President in the early 1990s.

She always came home from meetings with/about Warren Village so energized and delighted in sharing about people she had learned about.

Her focus was always on helping people, specifically, and on helping families achieve financial stability and independence. Her company's motto was "the foundation for a better financial future." She lived in beautifully with her work at Warren Village.

She involved all three of her children (and her lovely daughter-in-law) with various events during the years. She celebrated the 40th anniversary celebration in October 2014, in which her granddaughter, Ashley, participated.

Three generations of Kollath family members have now been involved with Warren Village activities!



Theresa Kollath

What does it mean to you and your family to support our mission?

By example, our Mom taught us to be very community focused, and all of us continue this in various ways. All three of her children are involved in a variety of activities—from working with local 4-H clubs and 4-H foundations, to providing blood donations to Bonfils Blood Center, to contributing to Food Bank of the Rockies, to the Komen Race for the Cure, to shaving his head for St. Baldrick's Day (Tony is the brave one there) – we all do our best to help our communities in various ways.

Support for Warren Village is another facet of this, and one so deserving of support. Stability, safety, and the right amount of help and knowledge at the right time can have an enormous positive impact – and that's what Warren Village helps to provide.



Pictured: Trustee and Legacy Society member Mark Waddell, Melody Kollath, June Twinem, and Mary Anne Harvey, Trustee

Marketing: Social Norms

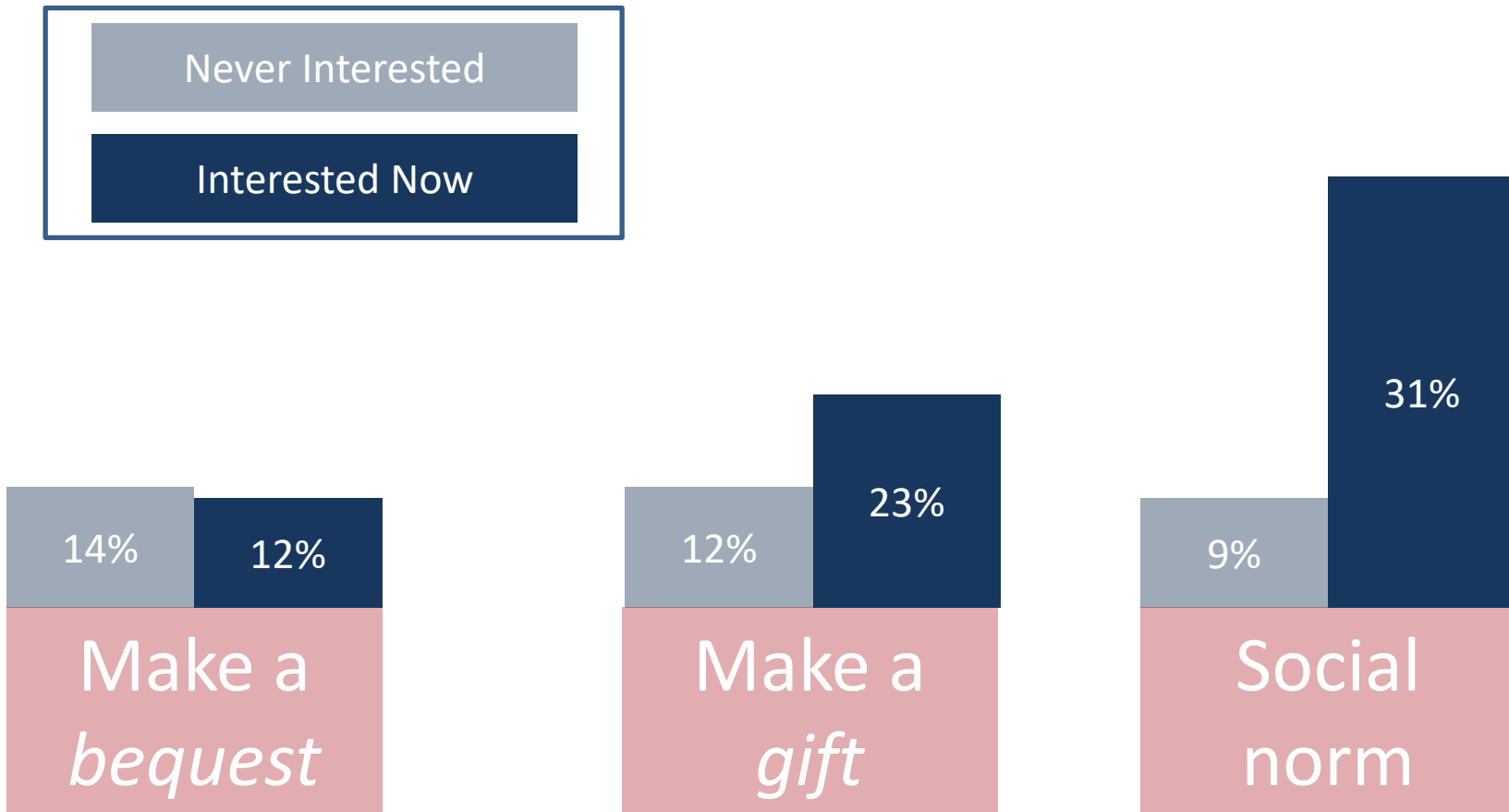
Generic:

Would you like to make a gift to charity in your will?

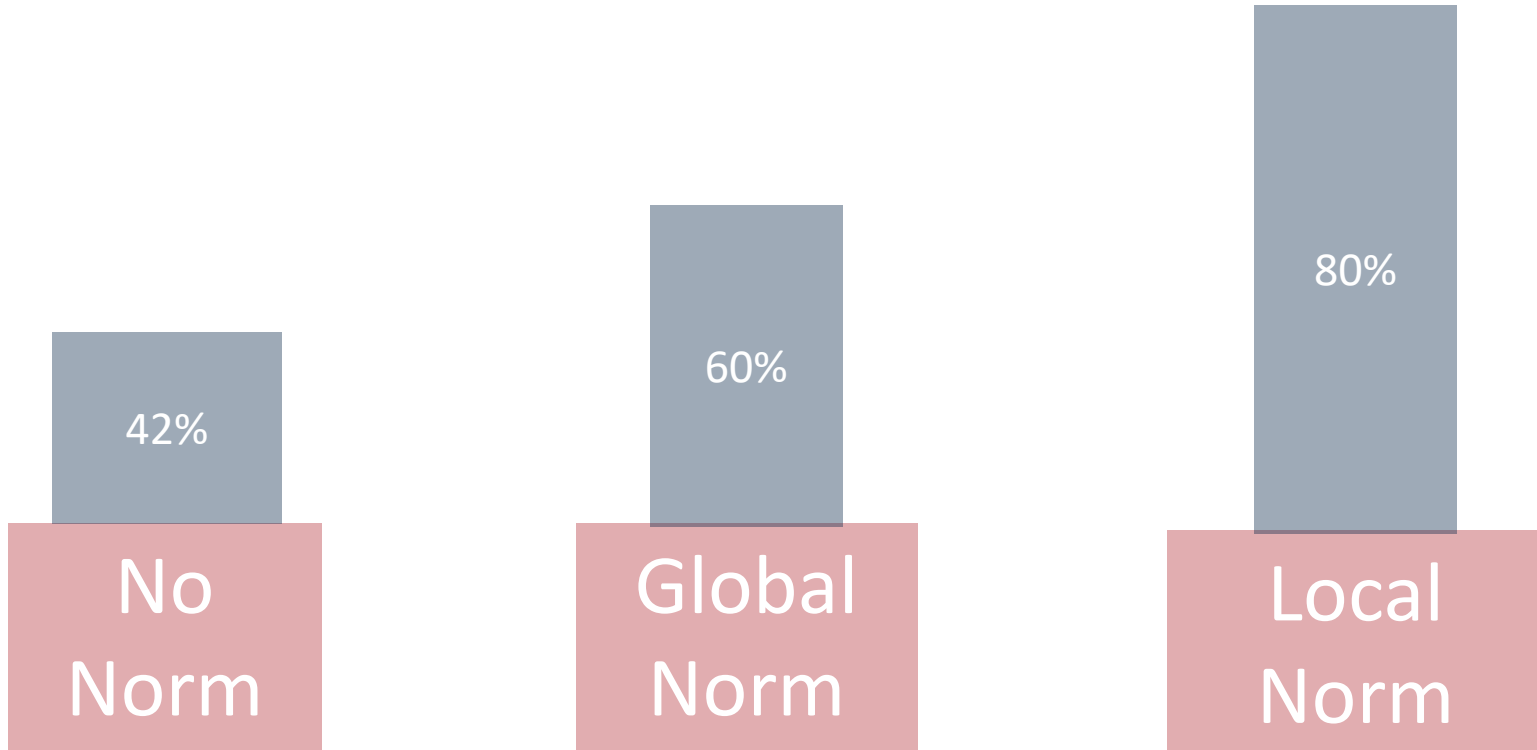
Social Norm:

Many people like to leave a gift to charity in their will. Are there any causes that you would like to support in this way?

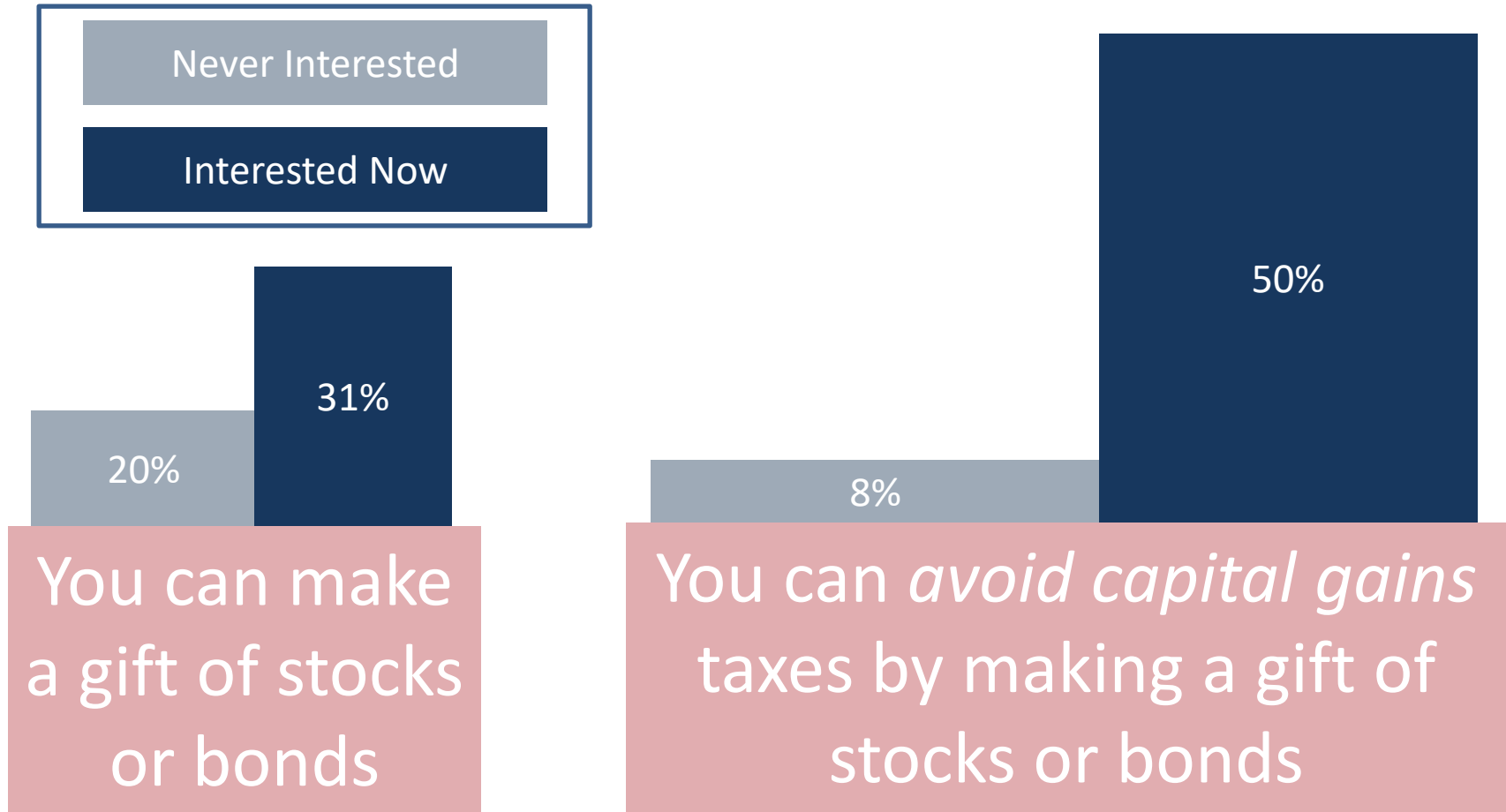
Marketing: Social Norms



Marketing: Social Norms



Marketing: Show Benefits



Marketing: Use Simple Language

Make a lasting impact on
_____ with a gift in your
will, trust, or retirement
funds.

Tagline

Marketing: Make it Relatable



"We stand on the shoulders of those who came before us, and Devorah and I are blessed to honor the Jewish sages' wisdom by paying it forward. Life & Legacy allows us to do just that for the Jewish organizations – like Kavod – that we cherish."

—Daniel (and Devorah) Bennett



"My grandparents were instrumental in creating the institutions to support Jewish life in Colorado. It's up to me to make sure those agencies have the resources they need to care for our community for many more generations."

—Jamie Sarche

"I am a Legacy Society member because providing housing for seniors in the long term is an impact I want to make, even after my death. Keeping a roof over someone's head is the greatest legacy a person can leave."

—Molly Zwerdlinger



If you'd like to speak with any of these individuals about their Legacy membership, I know they would love to talk with you about why they joined and what kind of specific plans they have in place. I am very proud of the Legacy Society and am honored to be part of it; I believe you will be, too. The future is in our hands, and we can all make a difference. 🌸

"A legacy commitment to Kavod is an easy and efficient way to support Kavod, and all the terrific work it is doing. I quickly learned that completing the form took almost no time and gifts of any level are greatly appreciated. My wife and I were happy to be a part of the community supporting Kavod and being Legacy Society members."

—Steven (and Loraine) Summer



Testimonial Library

Marketing Takeaways



Foster connections through stories



Show giving as a social norm



Demonstrate a tangible benefit



Use simple language

Stewardship



Stewardship: Timing

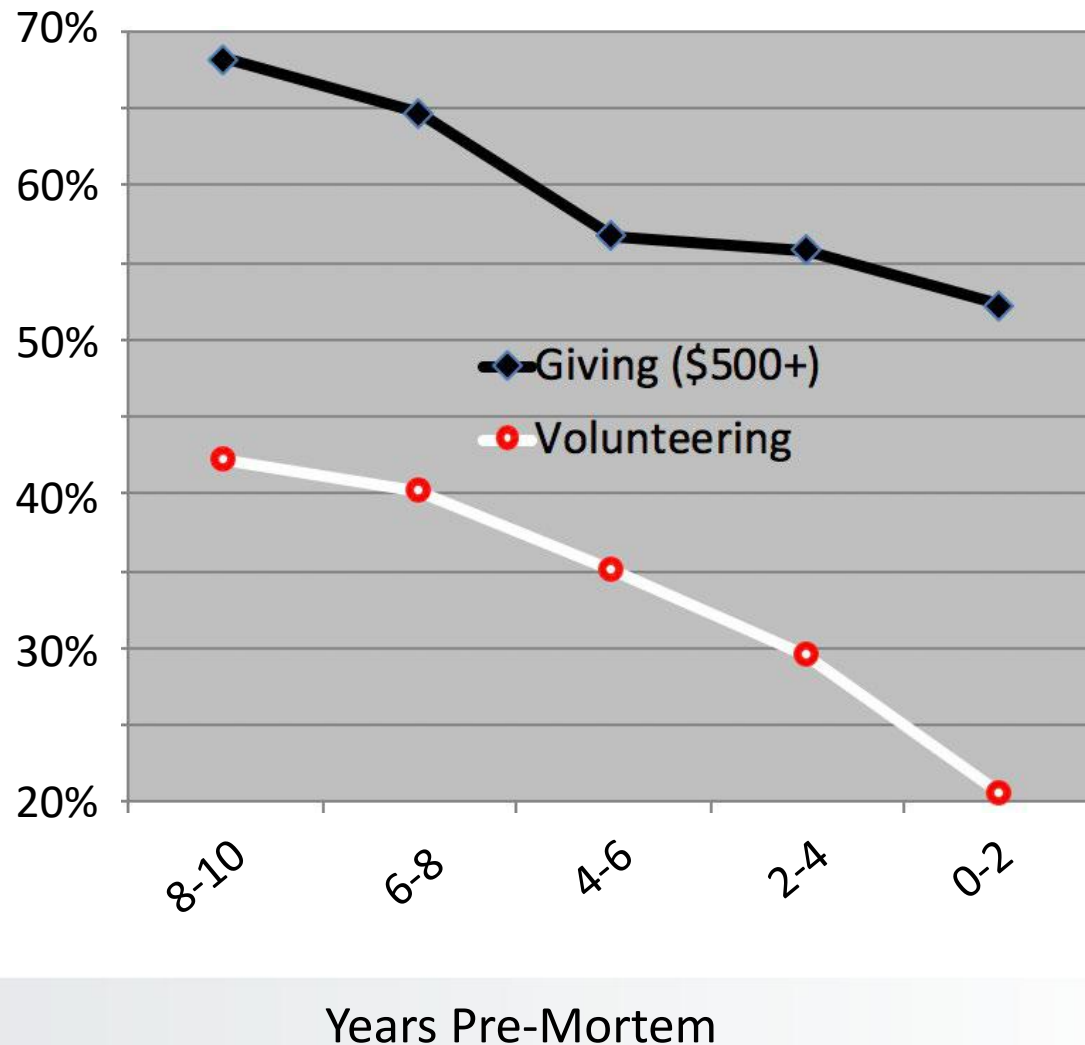
Destabilizing Events



Death feels
near

Family structure
changes

Stewardship: Timing



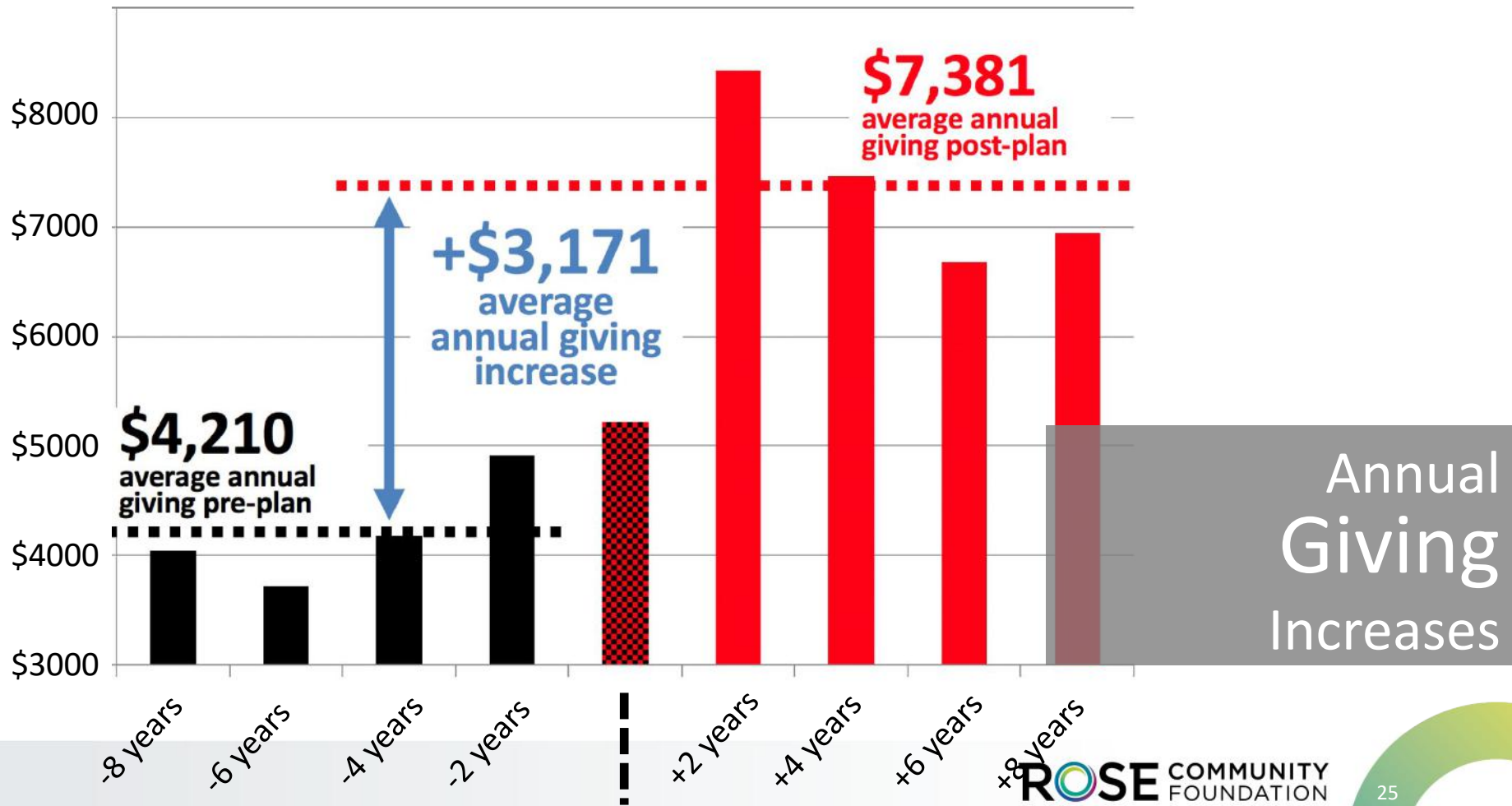
Stay Present

Stewardship: Timing



Larger
Gifts

A Good Reminder



Stewardship Examples

Hi, Amelia, Jewish Family Service made this video just for you, our loved Legacy Society members!

WATCH YOUR VIDEO!



Marketing + Stewardship

Our legacy society is growing!

Thank you to our newest legacy donors:

Amelia and Andrew Fink
Judy Altenberg and Bruce Plotkin
Sarah Indyk and Charlie Miller

Join them in making a lasting impact on our community through a gift in your will, trust, retirement fund, or life insurance policy.

Thank You

To the members of our Legacy Society, HEAroes for the Future, who are including HEA in their will, trust, retirement account, or life insurance policy.

HEAroes for the Future

Anonymous (12 HEAroes)	Dr. Peter and Gabriela Gottlieb	Mona Pasternack
Mark Alpert and Caryn Osterman & Families	Tony Gottlieb and Katherine Dealy	Jordon z"l and Essie Perlmutter
Jeffrey and Nhi Aronheim	Richard and Eileen Greenberg	Neal and Michele Price
Joshua and Shannon Berman	Rabbi Salomon and Melanie Gruenwald	Roberta Quiat
Dr. J. Tashof and Sharon Bernton	Robert and Diane Hochstadt	Dr. Harley and Sara Rotbart
Evelyn Binsky	Lawrence Kopf	<i>Robert Rottman</i>
Jason and Barbara Carroll	Mark and Ellice Krivel	Rick and Julie Rubin
Morey and Evelyn Cohen	Carla and Jay Kutnick	Lee Rudofsky
David and Vicki Dansky	Steven and Leslie Levine	Joan and Ken Saliman
Seth and Bonnie Davis	Bruce and Barbara Likoff	Cherie Karo Schwartz
Jonathan Defez	Leonard z"l and Sylvia Litvak	Bruce and Nora Schrutt
Rabbi Bruce and Tammy Dollin	James McKeon	Philip and Holly Segel
Michael and Robin Engleberg	Sidney K. Methner	Lisa and Marc Soicher
Ken and Sheryl Feiler	Jody and Mark Meyer	Harvey H. Sundel
Bill and Lynn Gefler	Scott and Debra Michaud	Kimberly and Wayne Turnbow
Joshua and Lynn Ginsberg-Margo	Jay and Lois Miller	Shelly H. Tuteur
Joshua and Pamela Gold	Scott Miller and Mona Jacobson	Eve Wood
Scott and Shari Goldstein	Dr. Louis and Laurie Morris	

To learn how to support the HEA today through a Plus level membership or tomorrow through a Legacy Gift contact:



LIVE ON
BUILD YOUR JEWISH LEGACY
An initiative of ROSE COMMUNITY FOUNDATION

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VP, Development
lisasoicher@gmail.com
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Marketing + Stewardship: Events

REMBRANDT

PAINTER AS PRINTMAKER

DENVER
ART MUSEUM

Denver Jewish Day School is proud to offer a special morning with your fellow Chai Five Club and Legacy Society members for an exclusive visit to the

[Rembrandt Painter as Printmaker, Denver Art Museum \(DAM\)](#)

December 6, 2018, from 8:00 - 10:00 AM

Coffee and pastries will be served at Mad Beans from 8:00-9:00AM

The Rembrandt Painter as Printmaker exhibit will be open exclusively for our guests from 9:00 - 10:00 AM, and includes a private tour/lecture with exhibit co-curator Dr. Timothy J. Standring, Gates Family Foundation Curator at the DAM.

The DAM will be the sole venue for Rembrandt: Painter as Printmaker, presenting new scholarship on rarely-seen prints by Rembrandt van Rijn as well as related drawings and paintings.

Thank you for offering this unique opportunity to visit the Rembrandt exhibit at the Denver Art Museum and hear from the perspective and expertise of the curator. It was a delightful and educational opportunity and I am honored to be a member of this group!

- Bonnie Merenstein (Denver JDS grandparent, Legacy Society member, and Chai Five Club member)

Ask Me About
My Legacy

Stewardship: Virtual Events



NEW Virtual Coffee Chats with Jonathan FOR CHAI SOCIETY AND CAROB LEGACY CIRCLE MEMBERS

**Tuesday, February 16, 2021
9 - 10 am**

Executive Director Jonathan Lev will host regular chats so we can virtually gather, share updates, and answer questions about the J.

Jonathan will be joined by Senior Director of Programs Nancy Lipsey for our February Coffee Chat.

[Register to join us.](#)

Please contact Jessica Bornstein at 720-749-2514
or jessica.bornstein@boulderjcc.org if you have any questions.

What are the Chai Society and Carob Legacy Circle?

Chai Society members make a financial investment in the Boulder JCC by donating \$1,800 or more annually. Carob Legacy Circle members have made a legacy commitment to the Boulder JCC. Thank you for your generous support of the Boulder JCC as a Chai Society and/or Carob Legacy Circle member.



My Story, My Legacy



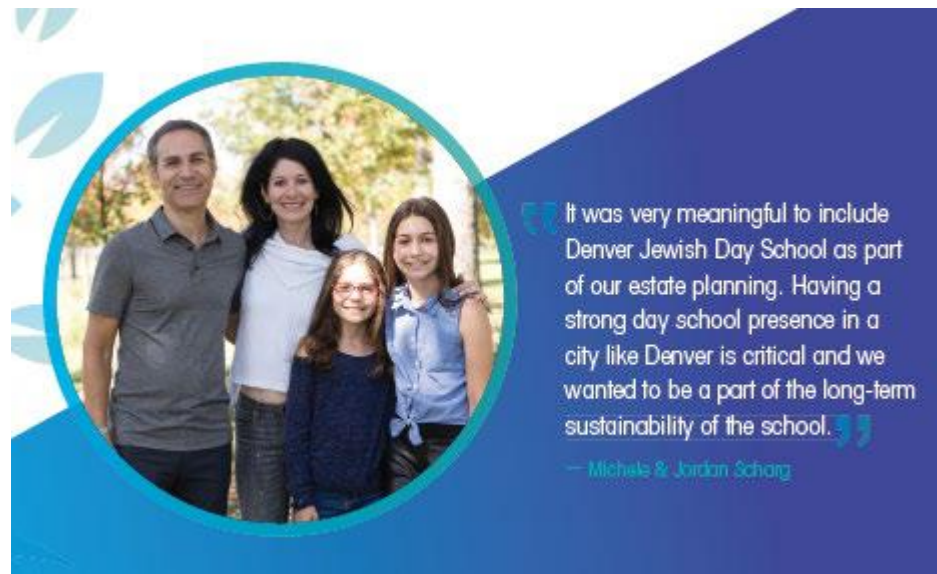
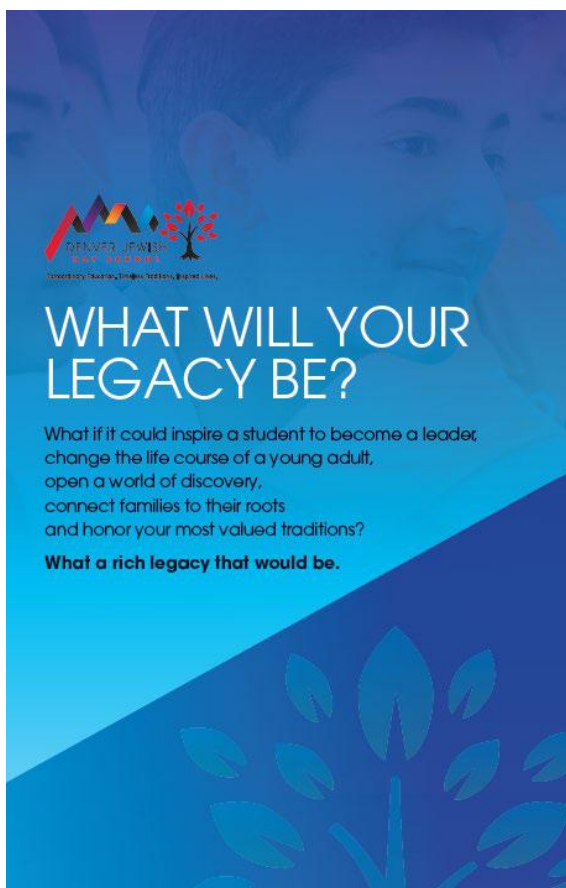
A guided legacy journal from
Rose Community Foundation



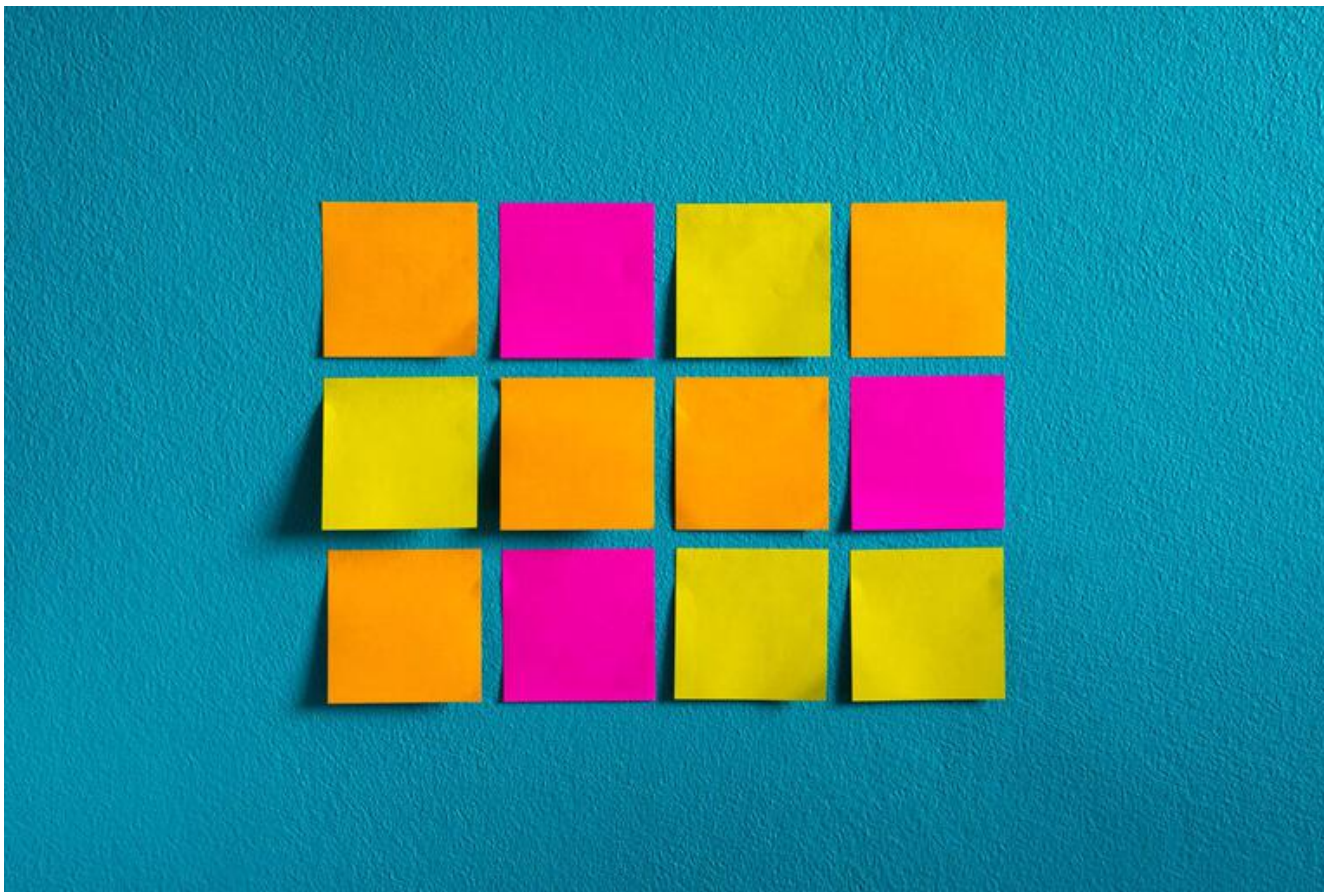
LIVE ON
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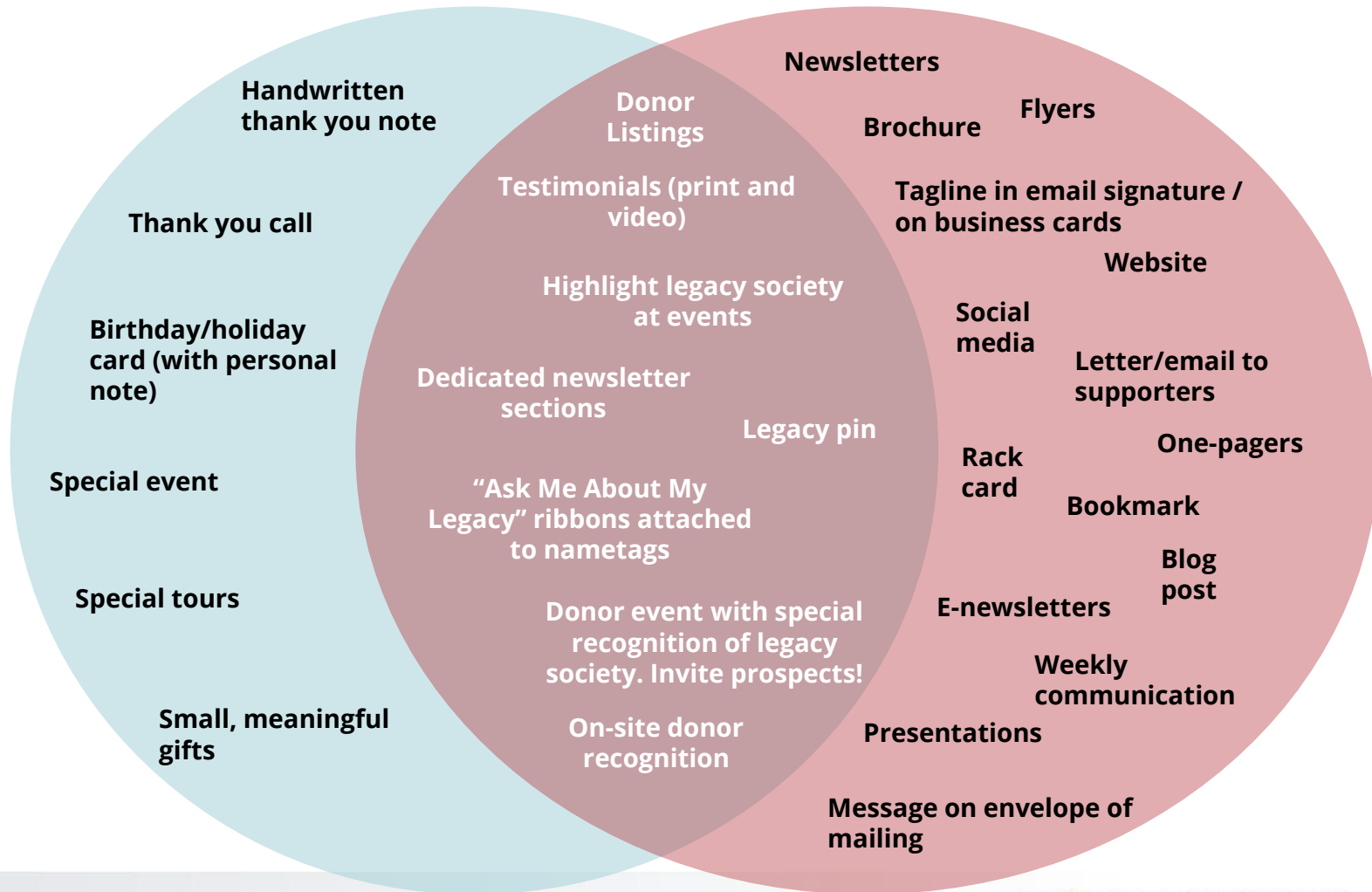
Seek and Find – Denver JDS Brochure



Takeaways – Keep it Simple



Stewardship + Marketing



Integrated Development Plan

- Case Statement
 - Management Plan
 - Prospect List
 - Marketing Plan
 - Recognition and Stewardship
 - Goals and Implementation
- } Draft before your individual coaching session

Implementation Checklist

Implementation Checklist

Task	Date	Cultivation/Legacy Conversations	Marketing	Stewardship	Team member responsible	Completed
January						
Present at board meeting		x			ED and development director	1/9
Have 2 legacy conversations		x			ED and board chair	1/8, 1/27
Ask Donor 1 to do a testimonial for Feb newsletter			x	x	board chair	1/22
Announce legacy society in monthly enewsletter			x		development director	1/12
Calls/thank you notes				x	board chair, development director	ongoing
February						
Publish Donor 1 testimonial in newsletter			x		development director	2/9
Facebook post with Donor 1 testimonial			x		development associate	
Prepare legacy society ad for March newsletter			x		development associate	
Have 3 legacy conversations		x			development director, board chair, ED	
Calls/thank you notes				x	development director, board chair, ED	

Questions



Thank you!

Amelia Fink

Director of Nonprofit Funds
and Endowments

Rose Community Foundation

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