



**Tomorrow begins today when you remember Federation  
and  
Create a Jewish Legacy  
LIVE Generously Forever**

**Federation's trusted role in building community**

Each and every day the Jewish Federation of Western Massachusetts joins together the human and financial resources of our community to enhance Jewish lives in our own neighborhood, in Israel, and around the world.

The Federation's Annual Campaign is the cornerstone of the Federation's fundraising efforts – the legacy funds are being raised to help endow the campaign in perpetuity.

Community is central to our culture, beliefs, and traditions. We bring people together to create collaborative partnerships in planning and meeting essential human service needs required by a myriad of constituencies. We meet those identified needs by raising funds which are allocated to more than a dozen beneficiary agencies empowering each organization to make a critical difference.

As the trusted Jewish organization for more than eighty years, we are uniquely positioned to respond to crises wherever Jews are in danger, when Katyusha rockets hit Northern Israel during the 34 day Lebanon war, when Jews were left penniless overnight in Argentina, or when bringing hope to Jews who lost everything during Hurricane Katrina. Federation works to reach out and engage people to become active participants in communal life and to teach them the importance of *tzedakah* and philanthropy.

**Federation's Core Values**

Our core values focus on *tikkun olam* – making the world a better place for everyone; *tzedakah* – sharing our portion with those less fortunate and being righteous and just; and *chesed* – performing acts of loving-kindness wherever and whenever social action and assistance is needed. Federation practices these ethical precepts along with good fiscal stewardship with the full trust of our donors and our community in our ability to meet our collective Jewish responsibility to preserve and pass on to the next generation our precious heritage and shared legacy to which we have been entrusted by preceding generations.

**How do we build tomorrow's community today? Remember Federation.**

**Perpetual Annual Campaign Endowment (PACE) and Lion of Judah Endowment (LOJE)** funds created to benefit the Federation's Annual Campaign are the foundation to building a vibrant community forever. These funds offer a stable and reliable financial base that is available annually, without restriction, to the local and global community supported by Federation and its Annual Campaign. Your generosity will spread light and nourishment to future generations and your name will be honored in perpetuity.

***Tomorrow begins today with your legacy gift to Federation.***

## **What is a Legacy Gift?**

We can create an opportunity that meets your philanthropic needs.

Options include:

- Testamentary bequest in your will
- Outright gift, using appreciated assets or cash
- Life insurance policy
- Pooled income fund
- Charitable gift annuity
- IRA or pension plan
- Charitable remainder trust

A legacy gift ensures that your annual campaign gift is forever in your name.

## **How will your legacy gift impact the future of local and global Jewry?**

Your legacy gift will have a positive impact on the quality of communal life for future generations. It will ensure funding will be available annually to support the needs in future generations. It will be offered without restriction to the next generations for use as they identify needs and priorities of their community.

When you remember the Federation by creating a PACE (Perpetual Annual Campaign Endowment) fund; **more** needy Jews will be fed, housed, and clothed; **more** children and adults will receive a Jewish education; **more** Jewish youth will connect with Israel and our shared heritage; **more** social action programs will benefit our community; **more** seniors will receive nutritious meals, social services, and healthcare enabling them to live longer, dignified lives.

## **Tomorrow Begins Today with Your Legacy Gift to Federation**

Your legacy gift will help the Jewish Federation of Western Massachusetts pursue its mission to care for *Klal Yisrael* by sustaining Jewish life and Jewish lives over many lifetimes. The long-term value of your legacy gift to Federation will elevate our sense of mission and purpose by guaranteeing a secure source of revenue to do what needs to be done to make the world a better place.

**For more information, call Pearl-Anne Margalit, Associate Executive and Campaign Director, at (413) 737-4313 or Scott Kaplan, Endowment Director (413) 732-9994.**

**Visit our website at [www.jewishwesternmass.org](http://www.jewishwesternmass.org)**

## 2. GROUPS FOR LEGACY CONVERSATIONS

- Jewish Endowment Foundation Advisory Board
- Jewish Federation of Western Massachusetts Board
- Past Presidents JFWM
- Past Chairs of JEF
- Campaign Leadership Team (CLT)
- Women's Division
- Young Leadership
- Lion of Judah/Pomegranate
- Long term staff
- Risk Analysis by:
  - Age
  - Top Donors/Giving Levels
  - Longevity
  - Capacity

## 3. MARKETING PLANS

- Events and parlor meetings
  - June 17, 2008 – PACE/LOJE Reception with Colonel Miri Eisen
    - Stewardship and Cultivation Event to honor current Generation to Generation Society members and to attract and reach out to new potential members
  - Florida Event in the Winter – Stewardship and Cultivation
  - Berkshire Event in the Summer – Stewardship and Cultivation
- Brochure – LIVE Generously Forever PACE/LOJE
- Sticker/Label for mailings LIVE Generously Forever Signs:
  - LIVE Generously Forever recognition sign with names of all Gen Gen and PACE/LOJE Donors and Star of David Society
  - LIVE Generously Forever sign with picture (JFWM and JEF)
- JEF and JFWM website and to be launched Create a Jewish Legacy website
- E-Newsletter and/or email campaign
- Other print media:
  - Postcards
  - Newsletters
  - Mailings/letter campaign
- Advertising:
  - Jewish Ledger Ads and stories (profiles of donors – Albert Goldberg, Arthur Pava, Elliot Bloom, etc.)
  - Springfield Republican. Longmeadow News, Reminder
- One-on-one conversations
- Parlor Meetings (coordinating around the GA and Lion of Judah Conference in November after attendees return from Israel)

## 4. RECOGNITION AND STEWARDSHIP

### Recognition Levels:

- **Star of David Society (\$200,000+)** of United Jewish Communities and the Federations of North America is an elite national recognition program that honors outstanding philanthropists. Members may be:
  - Individuals endowing a minimum annual campaign gift of \$10,000 with a PACE or

- LOJE of \$200,000.
- Couples who establish two PACE funds at a minimum of \$100,000 each.
- Individuals who create any permanent endowment of \$500,000 for any purpose.
- Star of David Society maintains the following recognition levels:
  - Level 1: \$200,000 and up receives UJC Recognition and artwork
  - Level 2: \$500,000 and up
  - Level 3: \$1,000,000 and up
  - Level 4: \$5,000,000 and up
- **Generation to Generation Society (\$100,000+)** recognizes the generous support of individual donors who establish or commit to the creation of a PACE or LOJE fund of a minimum of \$100,000 endowing an annual campaign gift of \$5,000 or more to the JFWM campaign. Members receive an engraved Crystal Flame.
- **PACE – Perpetual Annual Campaign Endowment** is a fund that endows an annual campaign gift at any level.

### **Stewardship and Donor Relations Management (Pre and Post Commitment)**

- All donors who make a commitment will become members of the Federation Legacy Society
- Shepherding conversations
- Recognizing that bequests can change; work to prevent negative legal change.
- Keeping donors apprised of key events in community
- Annual and consistent communication – year accomplishments
- Regular events to bring donors together
- Publicly recognizing donors who made a gift and are no longer with us.

### **Thank You and Recognition Methods and Communication Procedures**

- Combined Annual Meeting of Federation and Endowment
  - Dr. Arthur Pava
  - Albert Goldberg
- Events (see above – as mentioned in Marketing Plan )
- Physical recognitions, such as plaques, LOJE decorative ketubah
- Annual Report
- Newsletters
- Immediate Thank You:
  - Personal call as soon as receive knowledge of gift from Federation President and JEF Chair, other appropriate Board Members and/or Federation/Endowment Director
  - Thank you letter sent within 48 hours
  - Include permission to publish name(s) asking how to list their name(s)
  - Personal thank you note from Federation Executive Director and President of Board
- Ongoing Appreciation:
  - List on recognition wall (TBD) and all printed materials
  - Recognize at JFWM and JEF Annual Meeting
  - Thank you letter each year with an update
  - Birthday or special occasion cards (Jewish holidays)
  - Send notice to Board and ask them to thank if appropriate
  - Personal visits from time to time, especially with the elderly
- After the Donor's Lifetime:
  - Remember them once a year in a meaningful way (Annual Meeting)

## 5. SETTING GOALS

- 2008-2009: 40 conversations and 15 commitments
- 2009-2010: 50 conversations and 20 commitments
- **Totals** = 90 conversations and 35 commitments

## 6. MANAGEMENT AND COMMUNICATION

- Legacy Team:
  - Staff: Pearl-Anne Margalit (lead) and Scott Kaplan
  - Lay: Elliot Bloom, Susan Firestone, Sue Kline
  - Additional Lay Support: Steve Dane, Ann Pava, Ruth Weiss, Paul Bloom, Sharon Cohen, Ken Abrahams, Ronda Parish, Fay Smith
- Team Lead Responsibilities:
  - Marketing: Scott and Susan
  - Recognition and Stewardship: Scott (and Elliot)
  - Cultivation and Conversations: Elliot, Susan, Pearl-Anne, Scott
  - Identification and Screening of prospects: Pearl-Anne (and CJL Team)
  - Research and Support: David Feder and Michelle Lancto

## 7. TIMELINE WITH TASKS AND PERSONS RESPONSIBLE

### September 2008:

- Update risk analysis by age, giving levels, longevity, capacity (Scott/Pearl-Anne)
- Develop top prospects assignments for Fall (Scott/Pearl-Anne)
- Based upon risk analysis, determine priority order for conversations and sequencing (Susan/Elliot)
- Determine marketing plan for JFWM ad placement in Jewish Ledger and other materials (Scott/Pearl-Anne/Susan)
- Plan for GA and LOJE Conference pre and post trip conversations (Susan, Pearl-Anne, Elliot Fay, Ann, Ruth)
- 9/24/08: Annual Meeting announcement of CJL and Federation plans (Sue Kline, Steve Dane with Pearl-Anne and Scott)

### October 2008:

- Dedicate time at October Board meetings of JFWM and JEF to discuss Legacy Plan (Steve and Sue)
  - Introduce concept of PACE commitments from Board Members (Susan, Elliot, Scott and Pearl-Anne)
  - Mechanism for Follow up
  - Written poll of Board with options (letter):
    - Willing to talk
    - Have made provision
    - Can't do it now
    - Not interested
- Need for additional support in reaching out to others within the community
- Reach out to JFWM and JEF lay leadership and CLT for support of this plan (Sue K. and Steve D.) and PACE/LOJE committee.
- Develop 12-24 month calendar with target goals for number of conversations and

commitments (Pearl-Anne, Scott, Sue and Elliot)

- Break down 5-10 prospects for each CJL team member (Susan, Elliot, Sue, Pearl-Anne, Scott, Steve Ann, Ruth, Sharon, Ken, Ronda, Fay)
- Create Monthly update for Federation and JEF Boards on progress/plans for CJL (Pearl-Anne/Scott)
- Send out endowment mailing highlighting various giving vehicles (bequest, CGA, IRA, etc.)

**November 2008:**

- Israel Mission: GA and LOJE Conferences – Execute campaign conversations
- Begin to get signed commitments from key Board Members (JFWM and JEF) for PACE
- Begin conversations with Boards and Campaign Leadership Team to get PACE commitments (Legacy Team)

**December 2008:**

- By 12/31/08: Have 20 conversation with 8 commitments focused on Board level (50% of goal for 1<sup>st</sup> year) – Legacy Team

**January – March 2009:**

- By 3/31/09: 12 new conversations (4 per month) for a total of 32 conversations with 4 additional commitments for a total of 12 commitments (80% of goal for 1<sup>st</sup> year)
- Florida event and/or parlor meeting(s)

**April – June 2009:**

- By 6/30/09: 12 new conversations (4 per month) for a total of 44 conversations with 3 additional commitments for a total of 15 commitments (100% of goal for 1<sup>st</sup> year)
- **June** – Event and or/parlor meetings

**July/August 2009:**

- Re-assess goals for 1<sup>st</sup> year and refine 2<sup>nd</sup> year goals (Legacy Team)
- Summer Event (Berkshires)

**September 2009 – June 2010:**

- Additional 50 conversations and 20 commitments broken into 12-15 conversations and 5 commitments per quarter (Legacy Team)