

CBI Case Statement

“As others planted for me, so I am planting for the generations who come after me.” These words are the response of an old man to a youth who asked why he was planting a carob sapling whose fruit would take seventy years to appear.

Our heritage has been carefully and lovingly preserved by those who came before us. We today partake of the fruit of their labors as we avail ourselves of the blessings our Congregation Beth Israel provides for us. It is incumbent upon us to secure a vibrant Jewish future for the generations who will follow us.

Throughout its long and distinguished history, Congregation Beth Israel has served as a gathering place, a place to worship, to be inspired and to seek answers through study and a commitment to a just and better world. We have inherited the spiritual and social foundations created by preceding generations. Our legacy, indeed our responsibility, is to take what we know and pass it on to our children and grandchildren.

We are a Congregation that has seen its members, over more than fourteen decades, carry out a commitment to sustain synagogue life. We must continue this commitment because the synagogue is the dominant force in shaping Jewish identity and sustaining our people.

Congregation Beth Israel is deeply engaged in this sacred work through numerous programs of youth, family and adult education, caring community support, social action, outreach to mixed married families, and Pre-School as well as Day School Education. To maintain and strengthen these needed programs we must make provisions for our future.

Membership dues alone are not sufficient to support our current and anticipated needs. This is so because Congregation Beth Israel accepts any Jewish family seeking synagogue affiliation regardless of ability to meet our dues schedule. This is as it should be in our effort to sustain Jewish life, learning and communal experience for our children and grandchildren.

We invite your participation to help build an Endowment Fund through a bequest to Congregation Beth Israel. This will ensure that our synagogue remains a cornerstone of Jewish life in San Diego and the nation. We have formed the Dor L’Dor (Generation To Generation) Society to recognize your participation and the strength you will lend to our future.

We ask you to consider making a bequest in your will to Congregation Beth Israel. Such a gift involves little sacrifice in the present, but guarantees our Jewish future through maintaining vibrant synagogue life. Please help us plant for generations to come.

CBI Target Groups:

Individuals/Families having a connection with your organization:

1. Board Members
2. Former Board Members
3. Past Presidents
4. Committee Members
5. Volunteers
6. Men's Club Members
7. Women of Beth Israel members
8. Century Club Members
9. Yasher Koach Members
10. Endowment Committee

Individuals/Families demonstrating certain giving patterns and history

1. Closest and most loyal families
2. Consistent givers over ten plus years
3. Capital Campaign donors

Individuals/Families with personal characteristics favoring bequests

1. Seniors
2. People over 65
3. Grandparents of Day School students

Who will we go to first to build momentum, testimonies and leadership?

- Executive Committee
- Board Members
- Past Presidents
- Closest Families
- Century Club Members

CBI Marketing Plan

How will you educate and approach each Target Group?

Personal One-on-One Conversations

1. Targeted 10 families to start conversations
2. Key volunteers
3. Executive Committee (calls from Jeff and Barbara)
4. Board
5. Past Presidents (call each one after Feb. meeting)
6. Committee Chairs
7. Capital Campaign donors

8. Century Club members

Group Presentations

1. Presentation to Board four times a year (Gail Litman visit, present plan, etc.)
2. Presentation to Endowment Committee
3. Presentation to Men's Club
4. Presentation to WBI
5. Presentation to Yasher Koach
6. Presentation to Past Presidents in Feb.
7. Presentation to Century Club members
8. Presentation to Day School Parents
9. Presentation to Day School Grand Parents
10. Presentation to Religious School Parents

Special Mailings

1. Letter, Case Statement with Brochures from JCF in Spring 05
2. Mailing to Century Club members Spring 05
3. Letter and Brochure on Gift Annuities in Fall 05

Incorporation into CBI Materials

1. Put a response vehicle in Newsletter
2. Put periodic articles in Newsletter re Dor l'Dor members
3. Use JCF ads
4. List Dor l'Dor Society members in Newsletter in quarterly
5. List Dor l'Dor Society members in Rosh Hashannah booklet, bold members of Century Club who are members of Dor l'Dor

What vehicles/Tools will we need to Communicate our Case?

1. Use Case statement as insert in JCF Leave a Legacy brochure
2. Create presentation for group presentations (power point)
3. Put Case Statement in Newsletter
4. Make sure website has a link to JCF "Leave a Jewish Legacy"

How will coordinate with JCF marketing of Leave a Jewish Legacy?

- Inform Dor l'Dor Society members about the Book of Life and encourage them to participate
- Use JCF brochure for our mailings
- Use JCF ads in Newsletter

CBI Recognition and Stewardship

Define your "Society"

- We have created the Dor l'Dor Society already and have 12 members

- Membership criteria: Any family who verbally or in writing informs us of a bequest or planned gift included

How will you recognize members of your “society”

- What is your “Welcome Program”?
 1. Thank you letter sent within 48 hours
 2. Include permission to publish name asking how to list their names
 3. Personal call from President of Board and/or Rabbi Citrin
 4. Personal thank you note from Rabbi and President of Board
 5. Gift?
- List on recognition wall
- List names in Newsletter 2-4 times a year
- List names in Rosh Hashanah materials (bold members in Century Club listing)
- Annual event
- Include Dor l’Dor Society members in Century Club events
- Newsletter articles featuring Dor l’Dor members

What’s your Stewardship Plan for society members?

- Once a year event
- Thank you letter once a year with a list of Dor l’Dor Society members
- Include in Century Club events

CBI Setting Goals

Make them realistic—and achievable

Background:

- 1343 members
- 708 members over 65 (may include more than one in a member family)
- 181 Century Club members

2004 Askers: Betty Byrnes, Ann Mound, Stuart Simmons, Amy Corton, Barbara Haworth, Jeff Silberman, Rabbi Citrin.

Increase number of Askers in 2005 to 15 (past presidents, endowment comm. members)

Number of Bequests

Year 1: 18

Year 2: 15

Year 3: 17

Total: 50

Year 1 Goals:

Number of One-on-One Contacts: 24 (2 a month)

Group presentations: 3

Mailings: 2

Newsletter Articles: 3

Year 2 Goals:

Number of One-on-One Contacts: 24 (2 a month)

Group presentations: 3

Mailings: 2

Newsletter Articles: 3

Year 3 Goals:

Number of One-on-One Contacts: 24 (2 a month)

Group presentations: 3

Mailings: 2

Newsletter Articles: 3

CBI Management Plan

Volunteer Leadership: The Vice President of Endowment (presently Amy Corton) is the volunteer primarily responsible for the Leave a Legacy Program and the Planned Giving Program of CBI. The ELI Committee (Betty Byrnes, Amy Corton, Barbara Haworth, Jeff Silberman, Ann Mound and Stuart Simmons) is primarily responsible for defining the Leave a Legacy Program and the Planned Giving program and developing volunteers to work on the goals of the programs. The Endowment Committee (see attached list) acts as an advisory committee to the ELI Committee and the Vice President of Endowment. The Vice President of Endowment reports to the Executive Committee and the Board of Directors regarding the programs.

Staff Leadership: The Executive Director of CBI, Stuart Simmons, is primarily responsible for The Leave a Legacy Program and the Planned Giving Program. Beverly Miller is the staff person specifically assigned to the ELI Committee and the Planned Giving Program. She will keep the data bases and provide assistance to the ELI Committee, the Endowment Committee and the Vice President of Endowment. Rabbi Citrin will act in a leadership role by advising the committees and in cultivating families. The staff will report to the Vice President of Endowment and the Board of Directors regarding their responsibilities.

CBI is looking into hiring a Director of Endowment and Member Relations in the near future. Once that person is hired, they will be primarily responsible for our Leave a Legacy Program and Planned Giving Program.

The volunteer leadership will be responsible for:

- developing the CBI Leave a Legacy Plan,
- prospecting for families to leave estate gifts,
- educational programs for congregants,
- cultivation of families,
- asking for gifts
- thanking families.

The staff will be responsible for:

- all the foregoing responsibilities of the volunteers
- managing the CBI Leave a Legacy Plan
- developing systems to track progress and giving.

Endowment Committee

Brodie, Merle	mebrodie@sbcglobal.net
Byrnes, Betty	gingiesd1@cox.net
Charney, Jack	jcharney@luce.com
Corton, Amy	amycorton@hotmail.com
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Goldberg, Jerry	jhg@hsrg.com
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Levy, Jerry	zitzapper@aya.yale.edu
Littman, Gail	gail@jcfsandiego.org
Lubick, Marsha	marsha.lubick@sharp.com
Mound, Ann	anniem@san.rr.com
Poster, Larry	lsposter@aol.com
Silberman, Jeff	Jeffs@carletonmgmt.com
Simon, Ronald	Ron@risimon.com
Small, Hal	hss@halsmall.com
Weitzen, Eric	eric@weitzenphillips.com
Staff:	
Citrin, Rabbi Paul	pcitrin@cbisd.org
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Miller, Beverly	bmiller@cbisd.org