

San Diego Jewish Academy LEGACY PROGRAM

Introduction

San Diego Jewish Academy (SDJA) is one of the country's premier Jewish day schools, and the largest, most prestigious day school in the community. It challenges its students to achieve their full academic potential and become individuals of strong moral and ethical character, while inspiring them to make Judaism a vital and relevant aspect of their lives.

SDJA provides an education beyond academics. Every student is given the opportunity to participate and/or lead in Jewish campus life, sports, performing arts and school government. Low student/teacher ratios and individual attention from teachers maximize student success. SDJA educates the "whole child" by focusing on Jewish values. In doing so, the school builds future leaders who are respectful, thoughtful and caring.

SDJA began as a neighborhood school on the property of Congregation Tifereth Israel in San Carlos in 1979. As the Jewish population of San Diego and the enrollment began to increase and relocate further northwest, a second campus was added at Congregation Beth El in La Jolla in 1983. Long after outgrowing its rented facilities at Congregation Beth El, and spurred by major gifts from two families, SDJA's Board of Trustees embarked on a capital campaign in 1998 to build a spectacular 40-acre campus in Carmel Valley, complete with five academic buildings, a learning center, and athletic fields. The new campus opened in September 2000, with capacity for over 1,000 students, a high school (grades 9-12), extracurricular sports teams, advanced placement courses, a performing arts program, and state-of-the-art science facilities. This year SDJA is proud to be celebrating its 25th Anniversary and looks to a future that is bright and financially secure.

Promise

Through your generous gift or bequest to the SDJA Legacy Campaign you ensure the future of San Diego Jewish Academy, an outstanding educational institution that benefits our children and the entire Jewish community of San Diego.

Purpose

Creating an Endowment or leaving a Bequest or Planned Gift to the SDJA ensures that the school will continue to:

- challenge students to achieve their highest academic potential and become individuals of strong moral and ethical character
- educate Jewish children, who help to carry the teachings and values of our Jewish heritage forward to a time we will not see.
- inspire children to make Judaism a vital and relevant aspect of their lives

- provide an education beyond academics, including intramural sports, fine arts and performing arts
- attract new Jewish families to the community who require a quality Jewish day school
- provide a center of Jewish learning where parents, grandparents, and the general community expand their Jewish knowledge
- ensure Jewish continuity through one of the most effective and proven means of instilling strong Jewish identity in young people

For information about creating or participating in an endowment fund or leaving a bequest or planned gift to the San Diego Jewish Academy, please contact Meg Goldstein at (858) 704-3706 or via e-mail mgoldstein@sdja.com

Goals

Within the next 5 years the Academy intends to have raised \$10 million in endowment funds. Our Legacy Campaign was really launched by the generosity of the Chortek Family's million dollar Endowment. In addition to the Chortek gift we have endowment gifts and pledges from ten other donors representing \$802,751.

To ensure our goals are met, the following schedule of activities will be undertaken on an ongoing basis:

- 1 school wide mailing to disseminate the JCF "Create a Jewish Legacy" brochure and/or raise awareness of our Legacy Campaign.
- 1 letter appeal in conjunction with Grandparents and Special Friends Day, with the aim to realize 12 bequests per year and prospects to receive personal stewardship/solicitation
- 2 group presentations (excluding Board presentations) per year also with the aim of realizing 12 planned gifts/bequests per year (as stated above)
- 2 prospect personal/solicitation visits per month with the aim of realizing 5 outright endowment gifts per year

Over the course of three years we hope to realize the following cumulative results:

Year 1: 12 Legacy Gifts
 Year 2: 34 Legacy Gifts
 Year 3: 46 Legacy Gifts

Legacy Circle

The Legacy Circle represents those donors whose generosity and foresight will ensure that the San Diego Jewish Academy will always flourish and grow - teaching, nurturing and inspiring the next generation of Jewish leaders. The Legacy Circle recognizes those loyal and committed SDJA donors who create or participate in an outright endowment for the school or who designate a charitable gift through a bequest or planned gift to the school.

Targeted Donors

The Academy is blessed with both visionary and committed leadership and a base of loyal donors. The groups specifically targeted for inclusion in the Legacy Circle will be:

Board of Directors
Past Presidents
Past Board Members
Current Grandparents
Past Parents
Prior Donors to the SDJA Capital Campaign
Staff

Distinct approaches will be employed to reach members of these groups. In the case of high potential outright endowments (those projected to realize gifts of \$100,000 and above) a personal relationship and ask will be entered upon by the school's most seasoned leadership and solicitors. A formalized process of Stewardship (see attached) for, past leaders, prior mega donors and prospective high potential donors has been adopted to support this effort.

In order to raise consciousness and acquire bequests a series of follow up calls will be made by members of the Bequest Committee twice a year after special programs take place at the school to which "Grandparents and Special Friends" are invited. Additionally one mail appeal will be undertaken on an annual basis.

Marketing

- Video of the Case for Giving
- Brochure of the Case for Giving
- SDJA Website
- Link to the JCF Leave a Jewish Legacy Website
- Legacy Circle Annual Newsletter
- SDJA Newsletters
- SDJA Annual Report
- Letter Appeal
- ELI marketing materials

Recognition and Stewardship

- A thank you/welcome letter is mailed immediately upon a donor agreement to make an endowment gift or leave a bequest or planned gift to the SDJA.
- Names of all Legacy Circle Members (who have given permission) will be recorded on appropriate Endowment signage, per the Board adopted Endowment Policies & Procedures. Existing donors and all those who make gifts/bequests within the next 3 years (prior to August 31, 2007) will be considered Charter Members.
- An informational newsletter will be sent to all Legacy Circle donors, prospects and SDJA Board members. This annual newsletter will have timely planned giving information as well as a listing of all current members of the Society

- A recognition reception is integrated into the Annual General Meeting which is held every Spring and will recognize all Members of the Legacy Circle. In instances where a donor's endowment creates sufficient annual revenue to be included in the recognition events honoring annual giving they will be included in these prestigious giving circles as well and awarded all attendant benefits.
- A Legacy Circle Commemorative Book/Board is being considered to record the personal stories, intent and testimonials of members. All members will be encouraged to sign the *Book of Life* at the Community Foundation.

Education

A Financial Resource Development Task Force Meetings to built consensus around the school's message to donors and its need for ongoing fundraising. Serving on the task force were the school's philanthropic leaders, both from the Capital and Annual Campaign, representation from the Board, including the current, past and incoming Presidents, Parents & Alumni. Integrating a Legacy Campaign into our ongoing fundraising efforts was viewed as critical and will be widely supported by these key leaders. Additionally at its initial Board Retreat the SDJA 2004-2005 Board adopted a set of policies and procedures that will guide and govern this endeavor. The Task Force understands the wonderful opportunity provided SDJA by its participation in the Endowment Leadership Institute and the community wide "*Create a Jewish Legacy*" initiative sponsored by the Jewish Community Foundation.

Management

All the elements of the Legacy Campaign will be managed and coordinated by Meg Goldstein, Director of Development, in conjunction with a Financial Resource Development Steering Committee currently including

Leo Spiegel, President

Renee Sherman, Stewardship Committee Chair

Larry Acheatel, SDJA Executive Director

Deena Libman, SDJA Annual Campaign Coordinator

Janet Clancy, SDJA Marketing Director

Bev Pamensky, "*Create a Jewish Legacy*" Chair

Howard Berkson, Major Gifts Endowment Co-Chair

Marsha Berkson, Major Gifts Endowment Co-Chair

Carlos Michan – Latin Community Chair

*Peter & Elaine Chortek, have agreed to serve as Honorary Endowment Chairs.

All records & gifts will be entered into Raiser's Edge and kept strictly confidential. High potential donor histories and interactions will also be tracked in Raiser's Edge. Management and investment of Endowment Funds will be handled by the Jewish Community Foundation under the advisement of the SDJA Finance Committee.

SDJA STEWARDSHIP COMMITTEE PROPOSAL

The Academy has been blessed by the vision and generosity of many past leaders and major donors. These individuals have ensured the establishment, growth and continued enhancement of the school. In order to keep past leaders connected to the school and reflect our profound appreciation for their involvement as well as to attract new leadership and major donors to the Academy family, we are establishing a Stewardship Committee that will oversee and ensure ongoing and meaningful communication with these individuals.

The audience the committee intends to reach include:

- Past Presidents
- Mega Donors to the Capital Campaigns (those donors who have contributed \$100,000 +)
- Endowment Donors
- Bequest Donors
- Scholarship Circle Annual Donors (\$10,000+)
- Prospective Major Donors

The Development Department will undertake responsibility for ensuring that every member of the above group receives the following touches at the time their gift is made/paid:

- Personal letter of thanks from the Solicitor where applicable.
- Formal letter of thanks from the Department or relevant chairs of the campaign
- Appropriate signage on Donor Walls or Building Kiosks once commitments are 60% paid
- Once signage is completed the donor will be invited to the Annual General Meeting and/or a tour of the campus to be shown the signage.
- Personal letter of thanks from a member of the current Board of Trustees

Members of the Stewardship Committee will take responsibility for individual members of the above group and ensure that each of them is personally invited to a minimum of two of the following events throughout the year: Homecoming; Grandparents & Special Friends Day; Academy on Stage; the Annual Dinner; Open House; Kabbalat Shabbat; Mishpachah B'Yachad lectures; Graduation or Annual General Meeting. Invitations to two of these events should be extended to past donors and leaders on an ongoing, annual basis. They will also continue to receive a special message from the President of the Board twice a year, in addition to copies of the Annual Report sent in a separate mailing to them with a letter from the Executive Director.

The Chair of the Committee (preferably the Past President of the Board) will partner with the Director of Development in assigning prospects. They will be responsible for inviting members to the committee and ensuring that committee members follow up on their respective assignments. It is anticipated that the Stewardship Committee will meet 4 times a year.