



CHARITABLE GIVING

The Jewish Community that Could

Jewish Community Foundation helps secure the future of Jewish organizations in San Diego with nationally-recognized program

BY NATALIE JACOBS

“Reading about planned giving techniques can be very technical and not at all engaging,” says Marjory Kaplan, interim CEO for the Jewish Community Foundation. That doesn’t mean it’s not important. In 2003, Kaplan and her JCF colleagues Merle Brodie and Gail Littman, z”l, were determined to get people in the San Diego Jewish community talking about planned giving, endowments and charitable legacies. Kaplan had been JCF CEO for 10 years at that point and she was “very eager to do more endowments and planned giving with the Jewish community,” she says.

But how to make it less boring? “I think it was Merle who said ‘why don’t we do something like incentive grants that would reward our Jewish organizations for when they did move forward and create some bequests for their organizations.’

“It was a big light bulb that went off,” Kaplan recalls with excitement.

The three took a year to plan the program, which they called the Endowment Leadership Institute (ELI), and in 2004 the first 12 Jewish organizations had signed on. Another eight were quickly added, bringing the total of the first group to 20 Jewish organizations.

The idea was simple but revolutionary: JCF would provide annual grants of \$12,000 for three years to the Institute organizations. Their call was to Create a Jewish Legacy. The organizations (synagogues, day schools and local Jewish agencies) would meet all together with JCF three times a year to learn about endowments – what it means to leave money for an organization in a will or trust, and how to have those conversations with donors. They would create goals and then work together sharing advice and stories along the way.

Up until then, it was not common for Jewish organizations to get together, especially to share information about fundraising. When JCF broke down that wall of separation, they were surprised by the results.

“Most engaged donors in our community,” Kaplan says, “if they want to leave money to the Jewish community, it’s for more than one organization because our lives are rich and complex.”

So a conversation with one donor could quickly turn into two or three or even four endowments to different organizations – in town but also across the U.S. and internationally.

“When you have endowment conversations with philanthropists and with donors, it’s an intimate conversation,” says Jane Scher, who was committee chair of the ELI program when it launched (Scher is currently JCF’s Board Chair). “[It’s] about the things that they care most about in the world. It becomes a conversation about their shul, the school their kids go to, feeding the homeless in the former Jewish Soviet Union. Israel. It just encompasses a whole big vision about what the family is trying to do.”

To date, the program has amassed more

than 1,000 individuals and families across San Diego who have pledged endowments to 65 organizations across the Jewish and secular community. More than \$40 million has been “realized” – meaning the money has been received by organizations either since someone who made an endowment passed away, or through current endowment funds (those that go into effect while the donor is still alive).

“We thought if we could raise \$7 million for our community over a two-year period we would be doing good,” Scher says of the initial goals for the program.

Today, Sharleen Wollach, director of philanthropy operations at JCF, says they calculate \$200 million in pledged endowments.

“I’m a native San Diegan,” Green says. “I’ve seen a lot of growth in the Jewish community. But I still think we’re a small Jewish community compared to many around the country. To me, this is probably the most important financial initiative for the continuity of our Jewish organizations.”

“We had no idea how successful we would be and the effect that we would have,” Scher says. “Really what we wanted to do was to find a way to be of extreme service to all the organizations to help them to plan, to be strategic, to be visionary about their future.”

“The biggest challenge,” says Orin Green, who is the current committee chair of the ELI program, “was, if you’re Harvard or Yale or Rady Children’s Hospital, you have a team of people that work in the planned giving department and they solicit endowments and bequests. Jewish organizations pretty much run month-to-month, or maybe once in a while run a building campaign, but [they’re] constantly looking for money. But to become sustainable like those big organizations you have to have an endowment.”

In 2014, the Endowment Leadership Institute got a reboot. There are currently 17 organizations involved, some returning from 2004 and others brand new. Instead of incentive grants, JCF

is now offering resources such as marketing materials like logos and information sheets, along with one-on-one coaching, education workshops, donor consultations and more, at an estimated value of \$18,000 per organization.

“Most of our organizations don’t have anybody who just deals – I don’t know if any of them do – [have someone] that just deals with legacy building, it’s not affordable at the size of the organizations we have,” Green, who is a financial advisor by day, says.

The Jewish Community Foundation is now working to be those planned giving departments for the organizations involved in the Endowment Leadership Institute.

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After the initial launch of ELI, JCF was contacted by a group of philanthropists from New York, including Harold Grinspoon. Grinspoon and his Foundation worked with Gail Littman, who was spearheading the program for JCF at the time, with an idea to spin-off San Diego’s ELI into a national program. Under the name Life and Legacy, the Grinspoon Foundation wanted to introduce the program to 49 communities across the United States. Littman was working to make this happen when she passed away suddenly three years ago.

“We took a breath after Gail passed away,” Kaplan remembers. “Because, although it was very much a staff and board program, Gail was the one who ran with it and did an absolutely amazing job of getting everyone to work together and everyone to honor each other’s work and reach out to donors.”

Eventually, the Grinspoon Foundation was able to carry on with their national version of the program, and Sharleen Wollach has led the charge at JCF for their reinvigorated program.

“We encourage people to think of the community that has nurtured them and provided for them all these years as, a child, as somebody who is just as important as your own children,” Wollach says. “We call that making a statement. What will your legacy be?”

The Jewish Community Foundation started documenting these statements in written and video form, to serve as a reminder to the donor’s families and the greater community about the importance of Jewish giving. They call this “The Book of Life,” and video testimonials can be found on their website, jcsandiego.org. ☆

**Look out for the Jewish Community Foundation’s ad in our December issue, with the names of 1,000+ individuals and families who have promised a gift to a Jewish organization in their lifetime. Email sharleen@jcsandiego.org to make sure you’re on the list.*