

LIFE &  
LEGACY®  
FOR JCAMP 180



As my ancestors planted  
for me, so do I plant for  
my children

- *Taanit 23a*

## Why Legacy? Why Now?

Harold Grinspoon Foundation – October 2020

# Cohort I

Camp Avoda  
Camp Ben Frankel  
Camp Daisy & Harry Stein  
Camp Mt Chai  
Camp Northland  
Camp Ruach  
Ramah Galim



# Who's in the zoom room?



# Who's in the zoom room?



**Dena Morris Kaufman**  
Legacy Community Consultant



**Julia Riseman**  
Director of LIFE & LEGACY for JCamp 180

and

**JCamp 180 Mentors**



**Tammy L. Dollin**  
Legacy Community Consultant



**Arlene D. Schiff**  
National Director, LIFE & LEGACY



**Kate Garvey**  
Executive Administrative Assistant

# LIFE & LEGACY<sup>®</sup>

FOR JCAMP 180



## LIFE & LEGACY:

- 4 – year partnership program
- promotes after-lifetime giving to benefit local Jewish day schools, synagogues, social service organizations and other Jewish entities in order to build endowments

## LIFE & LEGACY for JCamp 180:

- 4-year program
- assists camps to promote after-lifetime giving to build endowments.



# LIFE & LEGACY

FOR JCAMP 180



Through **training, support and monetary incentives** we will motivate you to

- **secure legacy gifts**
- **steward donors**
- **integrate legacy giving into your culture in a sustainable way**

# Why Now?

**Endowments**, in the past a luxury, are **now an essential element of any non-profit's long-term financial stability strategy** as a result of:

- Dramatic fluctuations in investment returns
- Lowest interest rates in decades
- Diminishing government grants
- Fewer financial resources and higher demands for services

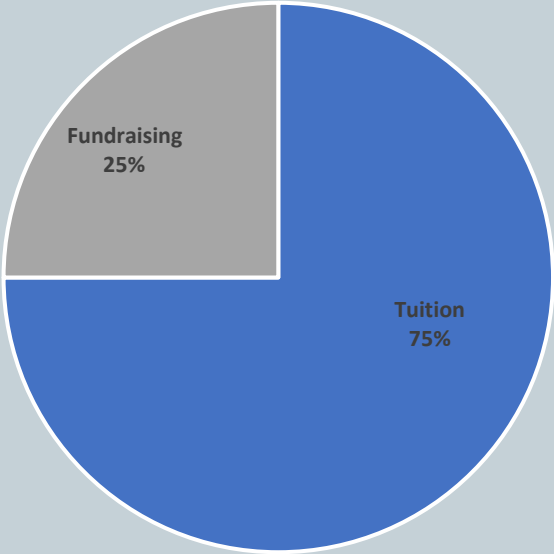
# Why Now?

Philanthropic advisors state: If **20% of your operating budget** is not **coming from your endowment by 2030** then your camp will be in fiscal crisis

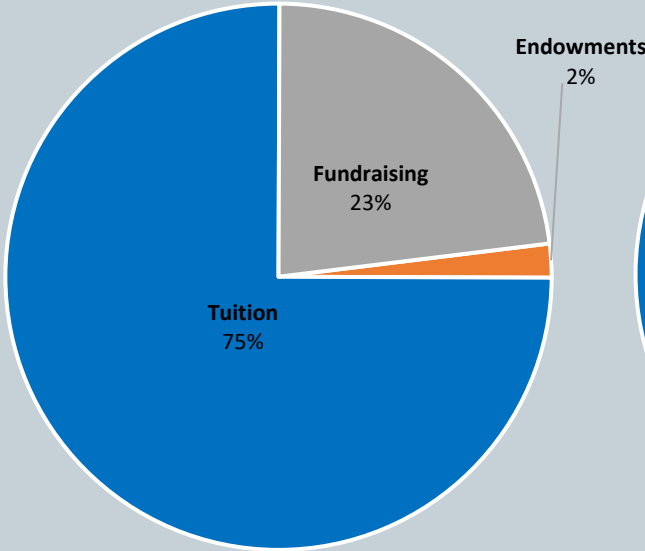




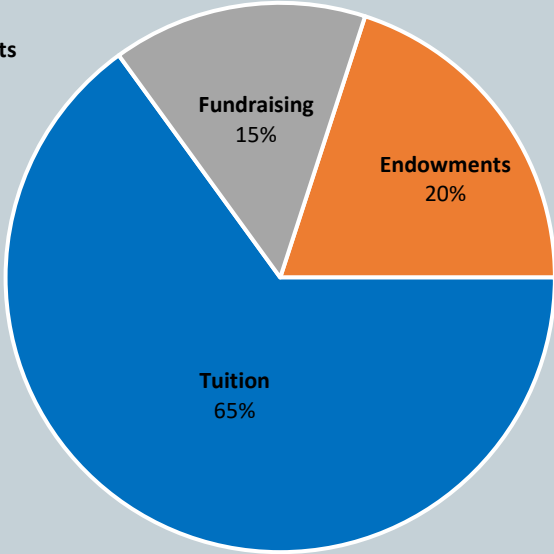
# Endowment Impact



No endowment



Small endowment



20% of operating budget coming from endowment

# Why Now?

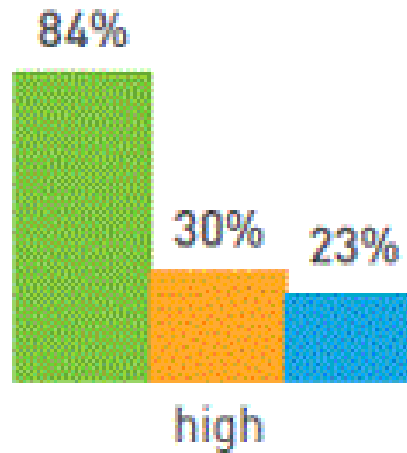
- The \$59 trillion transfer of wealth is underway
- If we don't ask, we will miss an opportunity
- To maintain the vibrant Jewish community we all value
- To secure the future for the next generation

*“We must be the change we wish to see in the world.” Gandhi*



# Why Now?

## Connect to Give Study



■ have a will or estate planning document

■ have a provision for any charity or cause

■ have a provision for a Jewish cause

Jim Gerstein and J. Shawn Landres. 2013. *Connected to Give: Jewish Legacies*. Los Angeles: Jumpstart

# Legacy Giving Motivators

- A **commitment** to being Jewish
- A desire to live up to the **values instilled** by parents and grandparents
- To **give** back
- To make a **difference**
- To be a part of something **larger** than ourselves
- To be **recognized**
- To feel **united** with others of similar commitment & **values**
- To **commemorate** loved ones
- To **share** their good fortune
- To **support** your organization and its mission because they value what you offer to the community



# Why Now?



Having this knowledge, the question HGF sought to answer is:

**“Can Jewish communities and camps be motivated to become proactive in encouraging widespread legacy giving?”**

With the implementation of LIFE & LEGACY the answer is now

**YES!**

# Securing Jewish Legacies Across North America



★ 4 Areivim ★ 69 Communities ● 12 Hillel Affiliates

- ★ LIFE & LEGACY: 69 Communities
- ★ Areivim: St Louis, Tucson, San Francisco, Philadelphia
- Hillel: 12 Affiliates

## Cohort 1

Charlotte, NC  
Memphis, TN  
Miami, FL  
New Haven, CT  
Orange County, CA  
Portland, OR  
Princeton, NJ

## Cohort 2

Chicago, IL  
Greater MetroWest, NJ  
Greater Washington, DC  
Milwaukee, WI  
Omaha, NE  
Sacramento, CA  
Southern NJ

## Cohort 3

Cincinnati, OH  
Delaware  
East Bay, CA  
Houston, TX  
Indianapolis, IN  
Phoenix, AZ  
South Palm Beach, FL  
Tampa, Orlando, Pinellas, FL

## Cohort 4

Central PA  
Charleston, SC  
Heart of New Jersey, NJ  
Minneapolis/St. Paul, MN  
Richmond, VA  
Seattle, WA

## Cohort 5

Central MA  
Durham-Chapel Hill, NC  
Lehigh Valley, PA  
Louisville, KY  
Nashville and Middle TN  
Palm Beach, FL  
Sarasota-Manatee, FL  
Tidewater, VA

## Cohort 6

Atlanta, GA  
Atlantic & Cape May, NJ  
Greater Denver, CO  
Dayton, OH  
Nevada  
New Mexico  
Northeastern NY  
Pittsburgh, PA  
Rochester, NY

## Cohort 7

Baltimore, MD  
Broward County, FL  
Calgary, AB Canada  
Montreal, QC Canada  
Rockland County, NY  
San Antonio, TX

## Cohort 8

Ann Arbor, MI  
Columbus, OH  
Ottawa, ON Canada  
Stamford, CT  
Toronto, ON Canada

## Small Feds

Arkansas  
Augusta, GA  
Chattanooga, TN  
Fort Worth, TX  
Peoria, IL  
Springfield, IL  
St Joseph's Valley, IN  
Halifax, Canada  
Flint, MI  
Northwest Indiana  
Orange County, NY  
Southern Maine  
Utah

# LIFE & LEGACY® NATIONAL STATISTICS

June 30, 2020

## Total Participants

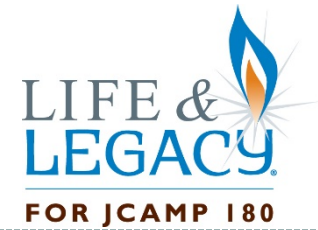


## Reporting Communities



Based on information provided on the 6.30.20 report

# JCamp 180 Legacy Camps



## 46 Day and Overnight Camps Since 2010

Organization Name	Legacy	Organization Name	Legacy
Camp Ramah Darom	Cohort 1	Camp Ramah in the Berkshires	Cohort 3
Tamarack Camps	Cohort 1	Habonim Dror Camp Tavor	Cohort 3
NJ Y Camps	Cohort 1	Capital Camps & Retreat Center	Cohort 4
URJ Eisner and Crane Lake Camps	Cohort 1	Camp Nageela Midwest	Cohort 4
Camp Ramah in Wisconsin	Cohort 1	Camp Bauercrest	Cohort 4
Camp Tawonga	Cohort 2	Camp Shomria	Cohort 4
Shalom Institute	Cohort 2	Camp Shomria - Canada	Cohort 4
Herzl Camp	Cohort 2	Camp JORI	Cohort 4
Surprise Lake Camp	Cohort 2	Kinder Ring	Cohort 4
Camp Yavneh	Cohort 2	Young Judaea Camp Tel Yehudah	Cohort 4
JCC Camp Seneca Lake	Cohort 2	Camp Young Judaea - Texas	Cohort 4
B'nai B'rith Camp	Cohort 2	Habonim Dror Camp Gilboa	Cohort 4
URJ Camp Newman	Cohort 2	Camp Solomon Schechter	Cohort 5
URJ Greene Family Camp	Cohort 2	Habonim Dror Camp Miriam	Cohort 5
Young Judaea Camp Judaea	Cohort 2	B'nai B'rith Beber Camp	Cohort 5
URJ Henry S. Jacobs Camp	Cohort 2	Steve & Shari Sadek Family Camp	
Habonim Dror Camp Galil	Cohort 2	Interlaken, JCC	Cohort 5
Camp Ramah in the Poconos	Cohort 3	Habonim Dror Camp Moshava	Cohort 6
URJ Olin-Sang-Ruby Union Institute	Cohort 3	Camp Jaycee	Cohort 6
Camp Moshava of Wild Rose, WI	Cohort 3	Berkshire Hills Eisenberg Camp	Cohort 7
Camp Poyntelle Lewis Village	Cohort 3	B'nai B'rith Perlman Camp	Cohort 7
Wilshire Boulevard Temple Camps	Cohort 3	Camp Havaya (was JRF)	Cohort 7
URJ Camp Coleman	Cohort 3	Pinemere Camp	Cohort 8
		Camp Young Judaea Midwest	Cohort 8



# JCamp 180

## Legacy Commitments

- 56 camps
- 3,700 commitments
- \$92.5 million in estimated future gifts



# Legacy Giving Myths



The Legacy Conversation is about the donor's death.

**NO!**



The Legacy Conversation is **offering the donor an opportunity to do something significant during their lifetime.**

# Legacy Giving Myths

- Only form of legacy gift is a cash endowment
  - **Legacy gifts fund endowments, majority not with current cash**
  - **Legacy commitments made with gifts of life insurance, retirement funds, bequests and other assets**
- Legacy gifts = taking away inheritance
  - **Majority estate is left to family members**
  - **Legacy commitments only a percentage of an estate**
- No will = no legacy gift
  - **Portion of retirement funds, life insurance policies or other legacy giving vehicles**

# Organizational Myths



- Legacy giving hurts annual campaign
  - **Donors tend to increase their annual giving after making a legacy commitment**
- Because we need money NOW, can't focus on the future
  - **An annual incentive grant allows you to benefit both now and later**
- We don't have time
  - **Already spending time on donor relations, and you should be, then have the time**

# Organizational Myths



- We can't run a legacy program because we don't have experienced planned giving staff
  - **We and others in your community are available to assist you and your donors**
- We can't run a legacy program because our lay leaders are not financial advisors
  - **Initial conversations will focus on the why not the how**
  - **When it's time to get into the details of how, you will be prepared**
- Effective legacy giving marketing be passive
  - **No, three-fold – (1) general education; (2) targeted communication; (3) one-on-one conversations**

# Legacy Prospects Myths



- Only those over 65 are planned giving prospects
  - **A donor of any age can be a legacy donor**
  - **Recent study found that 40-49-year olds have the greatest number of bequests to Jewish causes IF they have a will**
  - **Majority of gifts come from donors age 50-75**
- Only wealthy people are prospects
  - **Legacy most egalitarian form of fundraising**
  - **Best prospects - most loyal donors**
- Donors are going to leave everything to their children
  - **Donors who have demonstrated a commitment to your camp are likely going to want to illustrate that relationship to their children**

# Let's Bust Those Myths!



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Need to get out of the mindset of just focusing on the here and now and **cultivate a culture of planning for the future**



# Training Provided

## Year 1

- How to Write a Legacy Plan
- The Legacy Conversation
- Marketing Your Legacy Program
- Effective Stewardship

## Year 2

- Best Practices/The Integrated Ask
- Being Donor-Centric
- From Letter of Intent to Formalized Gift

## Year 3

- Stories, Stewardship and Formalization
- Individual Team Meetings

## Year 4

- Sustaining Your Legacy Program
- Individual Team Meetings



# Legacy Plan Components



- Case Statement
- Management Plan
- Identify Potential Donor Groups
- Marketing Plan
- Stewardship Plan
- Set Goals
- Implementation Plan



# Stewardship

- Strengthens your **relationship** with your legacy donors
- Keeps them **engaged**
- Makes them feel **appreciated**



# Stewardship



- Thank you note
- Phone call
- Cards- Birthday, Holiday  
Anniversary of legacy commitment
- Personalized letter
- Gifts
- Impact report

**CARE**  
Personal  
Connection /  
Share Impact

**SHARE**  
Donor  
Listings and  
Testimonials

- Newsletter
- Website
- Poster, digital display
- Annual report or event  
program

**Donor**

- Legacy Shabbat
- Gala or other special event
- Holiday programming

**HONOR**  
Recognition  
at gatherings

**INVITE**  
Special  
gathering

- Reception before “camp”  
gathering
- Invitation to event not  
open to general  
community

# Set Goals



- **Make goals ambitious yet achievable.** In the end this is all about planning for the future of your camp so the more work we do now, the brighter that future will be.
- **Commit to obtaining formalized legacy commitments**
  - Year 1: Minimum of 18 - try to reach for 25
  - Year 2: Minimum of 18 - try to reach for 25
  - Years 3 and 4 focused on formalization and stewardship

# Incentive Grants

Incentive grants awarded to those camps who reach their legacy commitment goals, each year of the first two years

**\$5,000** for minimum of 18 legacy commitments

**Additional \$2,500** for 25 legacy commitments

26<sup>th</sup> and above counts towards Year 2



# Ultimate Goal

**Legacy Giving  
Integrated  
into your  
Camp's  
Philanthropic  
Culture**



# Your Responsibilities

- Recruit and maintain a **legacy team**
- Attend **workshop** sessions – virtual for awhile, eventually in person
- Draft a **legacy plan** and meet with your assigned LIFE & LEGACY/JCamp 180 staff to discuss
- Finalize your legacy plan and submit to us
- Have **conversations** with your donors/camp families
- Meet **monthly with your LIFE & LEGACY/JCamp 180 staff** to discuss progress and/or address challenges





# Your Responsibilities

- **Report** your progress on a quarterly basis using an on-line excel spreadsheet
- Provide evidence that your camp has **established an endowment fund, with the money manager of your choice**, in which to place all legacy gifts received through this initiative
- Seek **assistance and support** from us as needed
- **Attain goals** outlined in your Legacy plan
- **Integrate legacy giving into the philanthropic culture of your camp**



# Impact on Your Camp

## Over the next year, you will:

- **Plan and actively work for the future** as you continue to meet today's needs
- **Dedicate professional and volunteer resources** to build your endowment so your camp will be financially stable in the future
- **Work collaboratively** with one another, sharing ideas and resources so all will thrive
- **Engage in meaningful legacy conversations**



# Impact on Your Camp

- **Secure legacy commitments** from loyal donors
- **Learn to recognize, appreciate and steward** so donors stay engaged with your camp over the course of their life
- Begin to **integrate legacy giving into the philanthropic culture of camp**



# Q & A



What questions do you have for us?



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for me, so do I plant for  
my children

- *Taanit 23a*

## Why Legacy? Why Now?

Harold Grinspoon Foundation – October 2020