



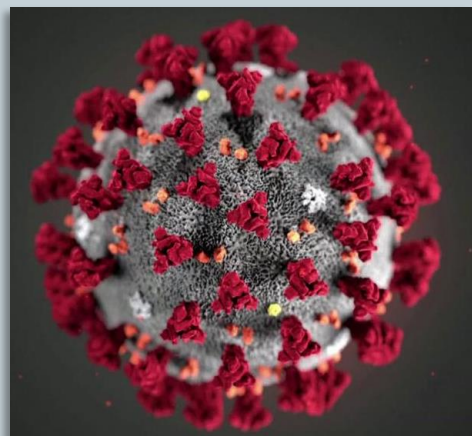
I found a fruitful world, because
my ancestors planted it for
me. Likewise, I am planting for
future generations.

- *Taanit 23a*

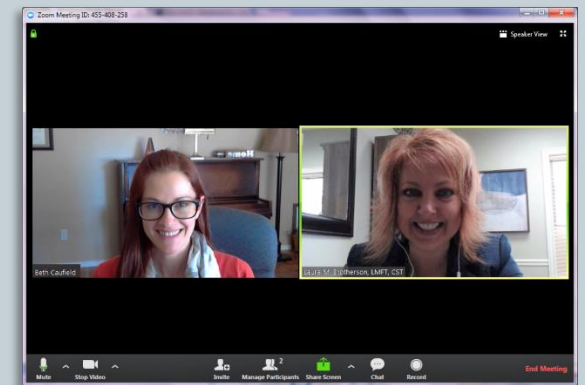
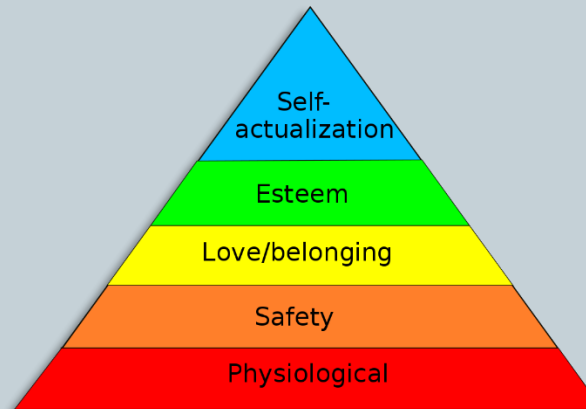
COVID-19 & Legacy...The Work Goes On

LIFE & LEGACY Team – July 2020
The Harold Grinspoon Foundation

The world has changed.



YOU have changed.



Your organization has changed.



Virtual Camp 2020

We are excited to continue to bring a taste of camp to our families this summer through our virtual camp programs. This programming provides campers an opportunity to connect, create and further friendships and participate in joyful Judaism wherever they may be. These virtual programs will be offered at no-cost to families. We understand that nothing can replace the magic of camp along the shores of Monterey, but we hope that you will join us this summer! We encourage families to consider [making a donation](#) to support our virtual summer program leaders.



**Edah (Age Group)
Connections**
Wednesday, July 8: 3-4pm PDT -
Edah Games & Connections (by
Edah)

Wednesday, July 22: 3-4pm PDT
- Battle of the Edot - Yom Sport



Cooking and Culture
Tuesdays 3-3:30pm PDT July 7,
14, 21, 28

[Click Here to Register](#)

Art



**Havdallah & Rikkud/Dancing
in Onesies**
July 11 9:00pm PDT

[Click Here to Register](#)

Erin Handelsman's Ramah Bat



Galim Tikvah Time
Wednesdays, July 8 and 22
3-4pm PDT

[Click Here to Register](#)

Vocational Education



Legacy work continues...



We know WHY

Two ways to respond to death:

Avoidance

(deny, ignore, procrastinate)



Consider lasting social impact (legacy)



Dr. Russell James, Michael Rosen; Legacy Fundraising: The Best of Times or the Worst of Times? 4/2020



Emotional Well Being Counters Avoidance Response

Autonomy (sense of control)

Take care of my family

- Write/Update a will
- Organize house and papers
- Share my story

Take care of myself

- Get enough sleep
- Stay hydrated
- Exercise
- Eat right
- Reward yourself (not food)

Connectedness (relationships)

- Reach out to friends
- Continue to support causes I care about
- Get involved

Competence (effectiveness)

- Learn Zoom technology
- Participate in virtual class/event
- Navigate a website/research

Interest in Estate Planning

Google searches reveal that interest in estate planning, over all demographics, is at an all-time high

Charitable gifts within estate planning are at an all-time high



“Begin with the end in mind” -- Stephen Covey

- 1) Destination is clear
- 2) Where you are now in relation to your destination
- 3) Ensure that steps will lead to your destination

Begin with the
end in mind



“Begin with the end in mind” -- Stephen Covey

- 1) **Destination = continuing to secure legacy commitments, formalize gifts and sustain your initiative**
- 2) **Now = unsure, uncomfortable about moving forward**
- 3) **Steps = despite COVID-19, how do we continue to move forward to reach goals and further integrate legacy giving into our culture**



Let's talk about HOW

- **Stewardship**...how do we show we care?
- **Marketing**...should we continue? What's our message?
- **New Conversations**...OK to have?
- **Endowments**...to preserve and to grow
- **Culture of Philanthropy**...changing fast!

Note:
“PHYSICAL Distance” –
NOT Social Distance



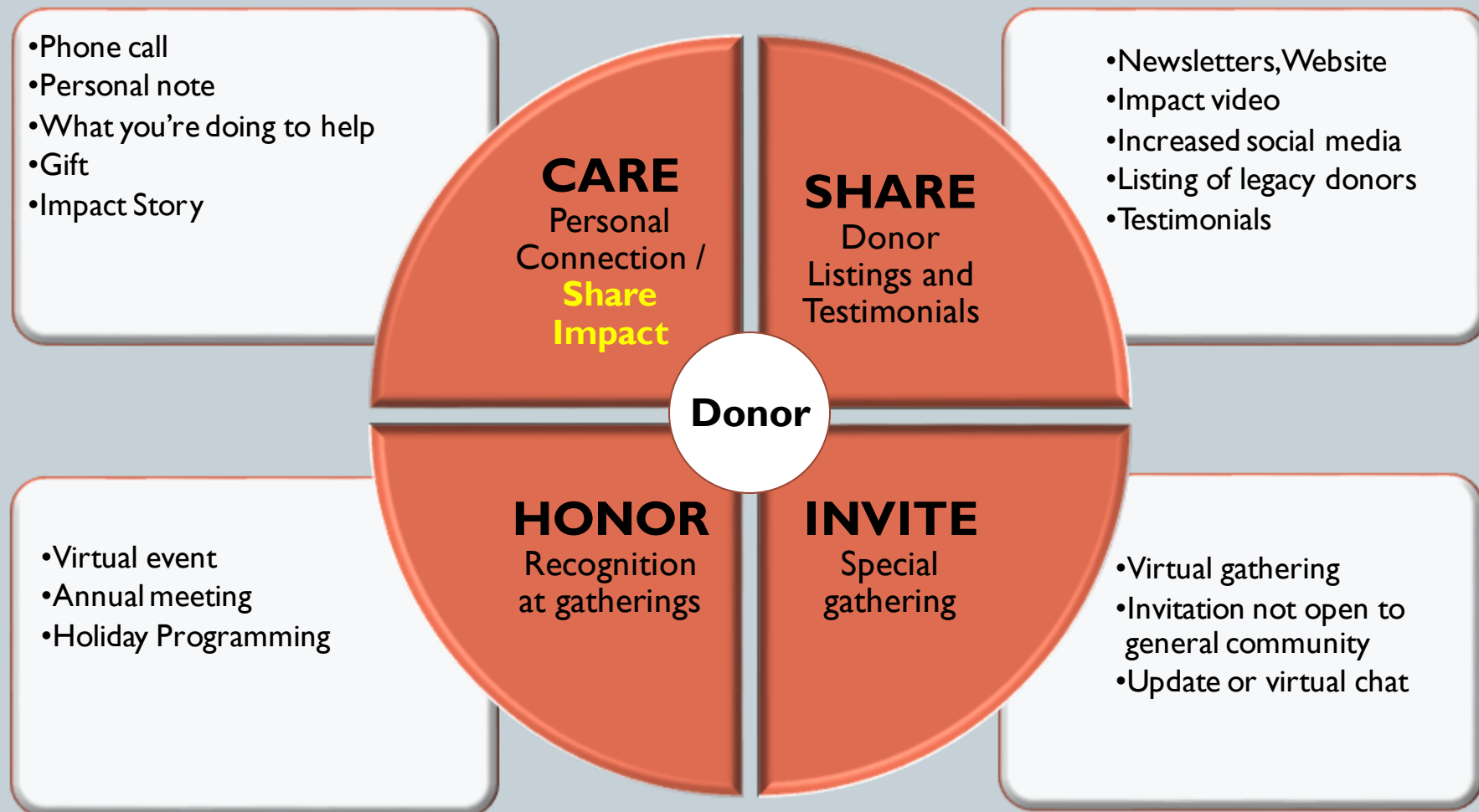


**Great Stewardship
is...**

when your donors
know that they
MATTER to you!

**Continue to
implement your
stewardship plan
with modifications
if necessary**

Effective Stewardship





- More people are answering the phone!
- Call your legacy donors and ask how they are doing
- Send personal, handwritten notes via mail
- Identify ways to connect (social media, individual outreach via Zoom, share story) and WHY to connect
- Send donors a short thank you video





- **List** legacy donors in e-newsletters, on website, in print newsletters if still processing
- **Share** donor testimonials on social media, on website, in e-newsletters
- **Share** what your organization is doing **NOW** that is making a difference in people's lives in all your marketing materials that are going to legacy donors and others



- Include a **message of gratitude** to legacy donors at any virtual events or gatherings, for providing for our future.
- **Dedicate event** or learning opportunity to legacy donors



Events with high risk donors will take the longest to return.
In the meantime...



- Host virtual event
 - Wine & Whine
 - Concert or lecture
 - Game show/trivia
 - Dress up and BYODinner
- Livestream chat with clergy or senior staff on how the organization is pivoting and continuing to meet needs
- Small group coffees hosted by VIP and moderator

You may need to **market a little differently** than you have been. Educate about endowments. Give hope for the future. It will work!

- **Integrate your messaging**
- **Use the tagline** to share the legacy message in your newsletter, social media and emails
- **Feature** legacy **prominently** on website
- **Share** testimonials of legacy donors (print, Facebook, email, website)
- **Tell** stories which demonstrate **impact** your camp is having on your campers/families lives



You can light the
candle for future
generations.

*Leave an eternal legacy to the Jewish community.
Remember Chabad of Bradenton & LWR in your will.*

Integrate legacy messaging in all existing marketing materials – ***even in your crisis campaign ads and letters!***

‘We’re here for ***your children/grandchildren*** today.
Your legacy gift ensures that we’re here for ***others***
tomorrow’



To **integrate** legacy giving into other campaign materials


Here's how you can help:

1. Cash Gift now for xxx
2. Other way to help – volunteer, Amazon Smile etc.
3. **Consider leaving a legacy with a gift in will, trust, retirement account or life insurance policy**



Recommended tag line:

Be remembered forever by Camp ABC with a gift in your will, trust, retirement account or life insurance policy



LEGACY SOCIETY
For Living Judaism

"Just as they planted trees for me, I am planting trees for my children and grandchildren so they will be able to eat the fruit of these trees"
-Honi, the circle maker

Jewish camping is the strongest stimulus to building Jewish identity in youth. Camp's mission is to increase the self-esteem of our campers, strengthen their Jewish identity, and create a stronger Jewish community.

The Legacy Society for Living Judaism was formed to secure the future of Camp Newman. Through the inclusion of camp in the estate planning of its members, the long-term success of camp's mission will be achieved for generations to come.

To make Camp Newman part of your estate plan, and ensure the long-term success of the camp, let us know by completing a Letter of Intent. We recommend speaking with your financial advisor to discuss what is optimal to meet your needs.

To discuss your planned gift to camp, contact Tracy Klapow, Development Operations Director, at tklapow@urj.org

For information,
contact:
[Tracey Klapow](#)
Development Operations
Director
(415) 392-7080 x13

Important Documents

[Why Legacy? \(PDF 479.62 KB\)](#)

Here is our Statement about why Legacy is critical to the future of Camp.

[Legacy Society Members \(PDF 226.33 KB\)](#)

Here is a list of our members

[Letter of Intent \(PDF 292.09 KB\)](#)

Signing a Letter of Intent expresses your promise to include Camp in your estate plan.

Rabbi Jason Gwasdoff



We have a challenge – to find what will help our people to continue on...camp will inspire children to want to be Jewish, to dig deeper into their Jewish identity"



1902 Legacy Society
We're Working on Supporting Our Future, So We Can Continue Doing What We Do Today, Even Better, Tomorrow.

Membership in the 1902 Society is open to all those who include Surprise Lake Camp in their estate plans. We hope you will tell us when you have done so because we would very much like the opportunity to say "thank you" for your generosity.

Letting us know of your intentions does not create any obligation on your part, but it does help us to be better aware of your particular interests and will allow us to keep you informed of developments at SLC which may be relevant to your planned gift. Recognition of your gift may also inspire generosity in others.

Members of the 1902 Society are very special to us, and we have developed several ways to recognize these dedicated people and to keep them fully informed of camp's ongoing plans and successes.

Click Here
1902 Society
"Just as my parents planted for me, so I plant for my children."
To Join Today!

Once you have completed the form, you may save it and email it to us. It's that easy!

Why I/We Joined The 1902 Society

Video Testimonials

1902 Society Testimonials - Surprise Lake Camp



What will your legacy be? By including Camp Ramah in Wisconsin in your will, trust, retirement account, life insurance policy or estate plan you will forever be remembered as a devoted supporter of Ramah!

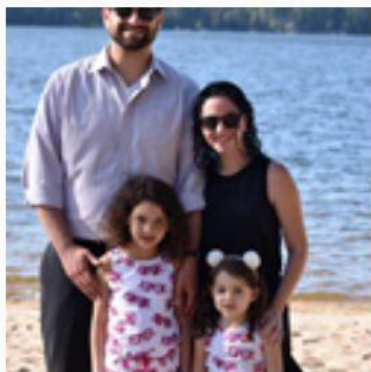
Please consider joining the Legacy Society today by completing a [Declaration of Intent](#). Legacy Society members are invited to make an entry in the online [Legacy Book](#), describing the role Ramah plays in their family. As you read the Legacy Book entries one theme emerges - the promise of one generation to the next ensuring the vibrancy of Camp Ramah in Wisconsin.

Legacy gifts may also be made through Retirement Plan Assets, Life Insurance, a Charitable Gift Annuity or Donor Advised Fund. Please consult your attorney or tax advisor for professional guidance in this area.

Camp Ramah in Wisconsin is proud to be a participating organization in Create a Jewish Legacy, a program of the Jewish Federation of Metropolitan Chicago, and an audit partner in It's Your Legacy, a program of the Jewish Federation of Greater St. Paul and the Minneapolis Jewish Federation, in partnership with the Harold Grinspoon Foundation.



Contact us



Rabbi Jeremy and Jessica
Fine



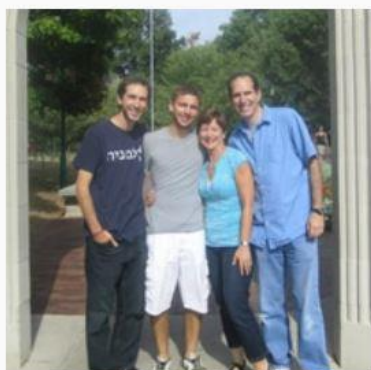
Lynnsie Balk Kantor



Phyllis and Rabbi Barry
Cytron



Linda and Michael
Hoffenberg



Reuben and Tami



Lisa and Steven Tenzer



Mayer Stiebel



Sarah Small

LEGACY CIRCLE and DONOR PROFILE

Temple Sinai Legacy Circle

Donor Profile

We are: Three generations of Morrisons: Barbara and Bob, Lindsey and Brett, Rachel, Joshua and Anja.

We joined Temple Sinai in: 1976 (Barbara and Bob), 2005 (Lindsey and Brett).

Our favorite Temple Sinai moment is:

Other than personal family simchas, those times when our congregants came together to help other congregants in need, whether they knew them or not.

We want our legacy to be: L'dor v'dor, from generation to generation. It is most gratifying that our children are carrying on our tradition of volunteering for Temple Sinai.

We made a legacy gift because: synagogue life has always been important to us. The best way to perpetuate Judaism is through community, learning and praying together, and being there to support one another in happy as well as sad times.

Temple Sinai is: a community of people, which we are very proud to be a part of.



"I was inspired to make my LIFE & LEGACY commitment because the Omaha Jewish community of the past was thriving and generous, the community we enjoy today is thriving and generous, and I wanted to ensure the same for our children and grandchildren."

~ Debbie Denenberg ~

Mayer Stiebel



Mayer (top left) and Stiebel in 1947

It has been my privilege to witness Ramah's success in the eight week, 24/7 immersion of kids in a total Jewish world. I have included Ramah in my estate plan so this vital experience can be perpetuated.

Lynnsie Balk Kantor



The problem is this: you find your spiritual home while growing up.

You find the best place and time there – it's Friday night, down by the lake, with everyone you love. All the cares of the week fall away as you watch the sun set and feel the song rise.

Maybe it's on Yom Yisrael, when your amazing Israeli counselors create programs, games, opportunities to learn, and of course, fire-writing, tying you to a place you've never been but to which you feel such a connection.

Perhaps it's just being with other Jews, something you can't get at home.

Beth and Dr. Jeff Kopin



Beth and Jeff pictured with two of their three children, Gabi (top) and Brett.

Back in the 1940's there were these incredible visionary leaders who had this crazy idea to buy a plot of land in the Northwoods of Wisconsin far away from our big population centers and start a Jewish camp. They started a Jewish camp that literally revolutionized Jewish education – that's what we're talking about with Ramah. So now it's our turn. It's over 60 years later and it's our generation's turn to see to it that we move the ball forward... To see to it that 30 years from now, 40 years from now, 50 years from now and even beyond, that that vision of the founders of camp had so many years ago is safe and secure. We have to give the gift of Ramah to future generations and legacy giving is one of the ways to do that. – Jeff Kopin

I can't think of anything more amazing than a legacy that we can leave behind to ensure the future of Ramah. Camp Ramah has been a powerful experience for our kids and our family. It was given to us and now we have the opportunity to give back. – Beth Kopin

Testimonial Ideas



“In this crazy time, our synagogue has been wonderful – checking on us, offering services and classes online, and even delivering a Passover meal. We know that if we need it, with one phone call our Temple Chai community would rally for us. We want to be sure that this loving community will be thriving for future generations so we are including Temple Chai in our will.”

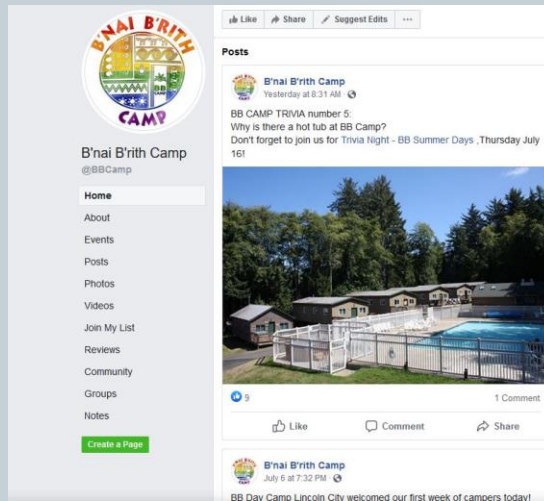
“For us, the COVID crisis has highlighted the important work that non-profits do to care for the most vulnerable and to enrich our lives – we are honored to provide for our favorite charities in our will.”

“During the COVID Crisis, we cleaned our closets, checked on all our loved ones – and then we decided to get all our financial and legal paperwork in order. Including Temple Chai is important to us so that it will be available for future generations”

Video is the **#1 communication tool** in the world.

Create real, short videos to

- **Show impact**
- **Bring joy**
- **Make connection**
- **Build relationship**



**Tell your story using
whatever medium
you are
communicating
with this days**

Yes! Even Now!

- People have time at home to focus
- Thinking about mortality
- Be ready and make it easy



- **Call** legacy prospects to check in
- **Use** technology to connect
- **Be open** to the right time to inquire if donor is interested in having a legacy conversation



Call legacy prospects to check in and strengthen relationship



- How are they?
- How is the family?
- Share what you have been/are doing



Dear (donor first name),

What a whirlwind these last few months have been! I hope you and your family are well and are adapting to our new world. So much is different today. And I am just beginning to appreciate how much of what I value remains the same.

You and I both share a deep connection to (Organization) and to our Jewish community. For me, it is the place my life revolves around, where I have made my friends, the place I turn to when I want to feel grounded and whole, the people who share in my joys and lift me up when I need it. (or replace with other language that describes your connection to the organization)

I am reaching out to you today to help make sure (Organization) will remain vibrant and have the resources to evolve to meet the needs of the next generation. A strong endowment will allow this to happen, and we are building just that – by securing after-lifetime charitable gifts as part of our LIFE & LEGACY® initiative.

Anyone can participate and it requires no money now. When you designate a charitable gift in your will, trust, retirement account or life insurance policy, you make an important statement of belief in the Jewish future.

I would love to talk to you about joining me and the (#) others who have committed to leaving a legacy to (Organization) as well as supporting the other Jewish organizations in our community that you value. I will be calling you in the next few days to schedule a conversation.

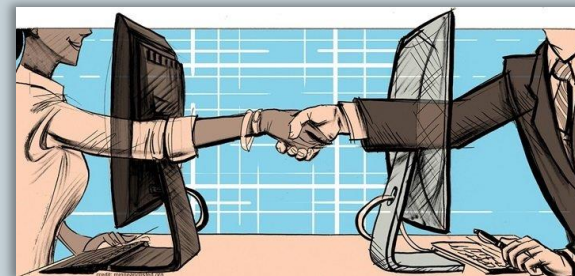
Thank you so much for being part of our (Organization) community.

(Closing language)

(Name of individual emailing)

(Mailing address)

If don't want to just call,
send email first





FOLLOW UP PHONE CALL

- **Check in on them again** and see how they are doing

- **Ask if they have time and would feel comfortable at this time talking about something you think they will want to be a part of.** If say yes, begin the legacy conversation

- **Ask usual questions:**
 - How did you first become associated with camp?
 - Why have you been such a loyal donor/camp family?
 - What is the most meaningful experience you have had through your association with camp?
 - What are your favorite things about the programs and services provided by camp?
 - When you think about our camp 40 years from now, what do you want to see?

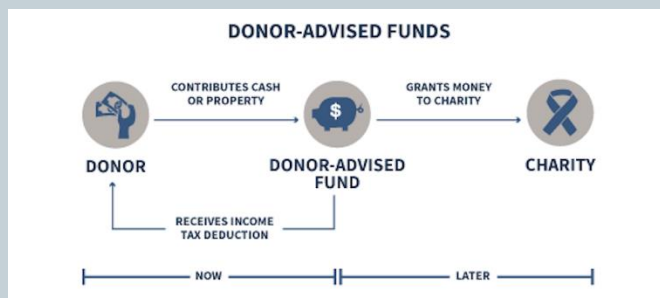




- **Listen** to what they are saying
- **Take cues** to move the conversation forward from them
- Only ask about a legacy commitment if they seem **ready to hear it**
- **Share why you decided to make a legacy gift**
- **Invite them to partner with you:** “Will you join me in making a legacy commitment to.....?”
- **Allow time to respond** – silence is not the enemy here (little harder on phone)
- Move to the next step no matter what their response
- If they say they will consider leaving a legacy – thank them and send your commitment form via email or snail mail.
- **Be sure to thank them whether they may a commitment or not and wish them continued good health**



Encourage donors to legally put their legacy commitment in place



Help further our mission with the

IRA CHARITABLE ROLLOVER

ACT NOW! If you are 70½ or older, avoid taxes on transfers of up to \$100,000 from your IRA





Dear (Donor name),

I never could have predicted this world in which we find ourselves. I hope you and your loved ones are in good health and remain that way. [insert personal reflection like “I hear my dog barking on every zoom call I take.” or “I am sheltering-in-place with my husband and four adult children and haven’t cooked so much in 10 years!”]

At this trying time, we are all in need of what anchors us. I am finding that connecting with those who are important to me, family, friends and checking in with the causes I care about feels good right now.

As a fellow legacy donor, you share my commitment to (Organization). You understand that we are here for people today and are committed to being here in the future as well.

As I looked for concrete actions I could take to help at this challenging time, I decided to sit down and formalize my legacy commitment to (Organization). I feel good knowing that (Organization) will be able to care for others in the future. I invite you to join me by putting in place the legal arrangements for your legacy gift. It is something simple you can do now that will make a big difference in the future.

I have included some information on ways to make your gift, and the attached Gift Confirmation Form lets us know you have done so. Please be in touch with [contact person] if you need assistance with this process.

We are all doing our best to move forward, and I firmly believe that our strength and resilience will carry us through, and there will be better times ahead. Thank you so much for all you do for our Jewish community.

(Closing language)

(Name of individual emailing)

(Mailing address)

Email template re:
legally putting gift in
place if this is
something your camp
has been doing



**What if your board
wants access to
endowment funds
above what is
normally permitted?**

We say:
**Be remembered forever
so we can impact lives of
future generations**

**If we spend the corpus,
how can we keep this
promise?**



- 1) Individual Donors
- 2) Donor Advised Funds
- 3) Crisis Fundraising Campaign
- 4) Use Reserves



A Culture of Philanthropy Embraces Relationship Building



Engaging Those Who Share Your Beliefs & Values



Building a Community of Believers



The Money Follows





I found a fruitful world, because
my ancestors planted it for
me. Likewise, I am planting for
future generations.

- *Taanit 23a*

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