I found a fruitful world, because my ancestors planted it for me. Likewise, I am planting for future generations.
- Taanit 23a

Sustaining Your Legacy Program

Arlene D. Schiff – November 2018
The Harold Grinspoon Foundation
LIFE & LEGACY is a 4-year partnership program of the Harold Grinspoon Foundation (HGF) that assists communities across North America, to promote after-lifetime giving to benefit local Jewish day schools, synagogues, social service organizations and other Jewish entities.
Building Jewish Legacies Across North America

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 Counties, NJ
Greater Denver, CO
Dayton, OH
Nevada
New Mexico
Northeastern NY
Pittsburgh, PA
Rochester, NY

Cohort 7
Baltimore, MD
Broward County, FL
Calgary, AB
Rockland County, NY
San Antonio, TX

Small Feds
Arkansas
Augusta, GA
Chattanooga, TN
Fort Worth, TX
Peoria, IL
Springfield, IL
St Joseph’s Valley, IN

September, 2018
More than half a billion dollars in future gifts!

- Participating Communities: 52
- Partnering Organizations: 565
- Communities: 20,683
- Hillels: 12
- Partnering Organizations: 565
- HGF’s Investment: $11.4 M
- Reporting: Over 5.75 years
- Legacy Commitments: 47% Legal Formally
- Estimated Value: $757 M
- Already Realized: $71 M

Based on information provided on the 6.30.2018 report.
What do you think needs to take place to sustain your legacy initiative in perpetuity?
Steps to Sustainability

• **Integrate into board** activities

• **Stay motivated**

• **Continue conversations and formalization** of commitments

• **Marketing** in perpetuity

• **Stewardship** part of organizational calendar

• **Integrated into all fundraising** activities

• **Continue transition to a culture of philanthropy**
Integrate into Board Activities
Committee of the Board

- Legacy team evolves from a “special project” to a standing committee of the board
- Appropriate succession plan in place so new people come on as others transfer off
- Chair of committee ideal role for past president
- Legacy committee report on board meeting agenda at least quarterly
  - keep board informed as to new gifts secured, total number of commitments, estimated future value, gifts realized
Endowments, in the past a luxury, are now an essential element of any nonprofit's long-term financial stability strategy.

Financial advisers have suggested that any nonprofit organization that is not receiving 20% of its operating funds from an endowment by 2030 will be in fiscal crisis.

A $1 million operating budget need to generate $200,000 per year:
- 5% spending policy = $4M endowment growing at 9%
- 3% spending policy = $6.6M endowment growing at 7%

In order to reach this goal, you need to take advantage of the transfer of wealth by continuing to have legacy conversations and secure additional legacy commitments over the next 10 years.
Case for Endowments

Endowment 2% of Budget

- Membership Dues/Tuition: 70%
- Program and Other Fees: 23%
- Endowment: 2%
- Annual Fundraising: 5%

Endowment 20% of Budget

- Membership Dues/Tuition: 57%
- Program and Other Fees: 18%
- Endowment: 20%
- Annual Fundraising: 5%
• Continue to **strive for 100%** board participation

• **Establish expectation** that every board member will make a legacy commitment sometime during his/her term

• When past or current board member legacy gifts are realized, **honor the individual at next board meeting**
What 2 things can you do to further integrate your legacy initiative into board activities?
Stay Motivated

IF NOT NOW WHEN?
Team Motivation

What makes a successful team?

- Clear goals
- Effective communication
- Positive atmosphere
- Mutual trust
- Adequate resources
- Effective leadership
- Commitment
- Shared vision
What 2 things can you do to improve your legacy committee experience?
Continue Conversations
Charitable dollars donated by bequests have **grown 30 percent** since 2013

**Baby Boomers** are currently the greatest economic force in giving. As they move into retirement, this generation is **expected to donate more than $6 Trillion**

We are seeing a changing attitude toward generational wealth, such as people **choosing to give a higher proportion of their wealth away** instead of passing it along to the next generation

*The future of philanthropy – Fidelity Charitable 2016*
PROOF THAT PLANNED GIFTS increase annual giving revenue

Dr. Russell James
The foremost researcher on the subject

Dr. James’ review of a 20+ year national longitudinal study thanks to the National Institute on Aging (the study has been federally funded since 1992)

Average annual gift PRIOR to making a planned gift: $4,210

Average annual gift AFTER making a planned gift: $7,381

GIVING INCREASED +75%
• As annual donors become **loyal donors** – consistently give for 5 or more years- make sure added to prospect list and legacy conversation takes place.

• Through marketing, stewardship and conversations you should **secure a few new legacy commitments each year**

• **#1 reason people don’t give is because they weren’t asked!**
Increase the height of your ladder
Continue Conversations

• Continue to have a **core group** of individuals focused on securing legacy commitments – **committee plus support from those who have made commitments**

• **Review your current prospect list** and establish a plan for having conversations
  • Each legacy committee member holds **one conversation per month**
  • **Committee meets quarterly** to review progress
Here are the six Ditch the Pitch Habits:

1. **Think Input Before Output**
   In a conversation with a donor, let everything you say or do be informed by what you hear and observe.

2. **Size Up the Scene**
   As you listen and observe, take stock of your potential donor’s character and situation to understand what this particular donor’s reasons for giving may be.

3. **Create a Series of “Yeses”**
   A conversation only moves forward if both parties continually agree to let it move forward. Always find something to say “yes” to as you speak with your donor, avoiding the words “no” and “but.”

4. **Explore and Heighten**
   As you engage your potential donor, look for ways to take the conversation to a higher level. Explore to find what your donor really cares about and then heighten by discussing why these things are important.

5. **Focus the Conversation on Your Donor**
   Resist the temptation to talk about your organization. Instead, have a conversation that is mostly about the donor.

6. **Don’t Rush the Story**
   Your donor won’t be ready to hear your ideas as fast as you come up with them. Let the story emerge through your conversation, at a pace your donor can accept.
Integration

- **Open** warmly and connect with donor
- **Ask** for the current gift first (annual, endowment, capital, specialty)
- **Thank** them for their commitment
- **Move into legacy ask**
- **Thank again,** no matter the outcome
Thank the donor for his/her legacy commitment through personal letters, calls and stewardship.

Ask him/her to formalize the commitment.

Make it easy – legacy commitment form.

Encourage gently.
What 2 things can you do to make sure legacy conversations continue?
Marketing
Remember Camp ABC with a gift in your will, trust, retirement plan or life insurance policy.

Stationery, Envelopes, Email signature lines with link, Newsletters, Email blasts, Pop-up on tables, Front page on website… EVERYWHERE
Get Creative

Together, we’re making a difference for the future of our Jewish community!

More than 40 people have signed a Letter of Intent making a commitment to leave an after-lifetime gift to one or more of the Foundation’s Create a Jewish Legacy partner organizations and you can do it too! Join us on November 6, 2023 at the 4th Annual Fundraising Bash at Life Community Celebration & Signing Event to honor and thank our Create a Jewish Legacy supporters. RSVP today!

To create your Jewish Legacy contact:

Marilyn Arenson, Director of Development
Jewish Community Foundation Orange County
8241 El Camino Real, Suite 230, Irvine, CA 92618
Ph: 949-495-2440 | mailto:marilyn@jcfoc.org | www.jcfoc.org

Till the end of the road...
Congregation Or Atid
1 day ago
Your Life and Legacy team is excited to talk to you about Living Giving! Your gift - big or small - can make a difference. Please join us on Wednesday, the 14th, at 7:00 pm for some noshing at the home of Lisa and Leon Roday while we learn more about this amazing program. Please call the office to RSVP.

Read Less

J V USN
SEPTEMBER 14TH
7:00 PM
AT THE HOME OF LISA AND LEON RODAY
YOUR LIFE AND LEGACY TEAM IS INVITING YOU TO LEARN HOW YOU CAN ENSURE YOUR CHARITABLE DREAMS FOR THE FUTURE BECOME A REALITY.
PLEASE JOIN US FOR SOME NOSSHING AND LEARN HOW YOU CAN BE A MEGOREM.
What 2 things can you do in the coming year to further market your legacy giving initiative?
Stewardship integrated into annual calendar
Stewardship

- Reception before “community” gathering
- Shabbat Dinner
- Invitation to event not open to general community
- Legacy Shabbats
- Annual meetings – light candles
- Galas or other special events
- Thank you note
- Phone call
- Cards – Birthday, Holiday, Anniversary of Legacy Commitment
- Personalized letter specifically for legacy donors
- Impact Reports
- Gifts
- Newsletters or newspaper
- Website
- Poster, digital display or donor wall
- Annual report or programs
- Annual meeting or other gatherings
- Thank you note
- Phone call
- Cards – Birthday, Holiday, Anniversary of Legacy Commitment
- Personalized letter specifically for legacy donors
- Impact Reports
- Gifts
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- Gifts
- Newsletters or newspaper
- Website
- Poster, digital display or donor wall
- Annual report or programs
- Annual meeting or other gatherings
Video is the #1 communication tool in the world — Lynne Wester, Donor Relations Guru

- [https://www.minimatters.com/thank-video-promote-donor-retention/](https://www.minimatters.com/thank-video-promote-donor-retention/)
- [https://www.youtube.com/watch?v=TNJggU-C214](https://www.youtube.com/watch?v=TNJggU-C214)
- [https://www.youtube.com/watch?v=54ZJ9LAjhF4](https://www.youtube.com/watch?v=54ZJ9LAjhF4)
We asked our students: “What do you love most about RMBA?”

Impact
2013 Highlighted Accomplishments

6 New Initiatives Launched
1. Day School Collaboration Network
2. Family Learning Initiative
3. Coalition of Family Engagement Schools
4. L'ORE
5. In-Service Parent Leadership Network
6. Early Childhood Center

$68M in federal and state funds were directed to Jewish day schools to improve the education of HPSR students.

150 New experiences and dynamic options for Jewish learning through 40 courses at institutions in part of our Westminster Jewish Teen Learning Initiative (WJTL).

"I have learned more than I ever imagined... not only about Judaism, but about life." - Camp, 6-year-old participant in the new innovative Jewish summer learning initiative designed for elementary school aged children.

1,000+ students are expected to attend three Jewish Future Conferences. Sessions included "Jewish vs. Innovation - A False Dichotomy," "Languages of the Heart," "The Role of Bar/ Bat Mitzvah in American Talmud, and Where Torah is it Anyway?"

100+ day school leadership teams learned to use new techniques, such as Design Thinking and Adaptive Leadership to develop innovative solutions to challenges in their day schools.

100 organizations across the United States were awarded grants through the J-LINC initiative in 2013. The recipient models were asked bringing the total to 13.

44 early childhood centers have been matched with innovative educational ideas through our J-LINC initiative, providing families and children age five years and younger with new kinds of Jewish educational opportunities.

Young Pioneers Awards were presented at the annual event to 10 innovative educators and 4 new Jewish award recipients.

FUNDING FROM THE FOUNDATION

2016

General Operating Costs $134,083
Funded Adathis clergy, staff, and maintenance team of Jewish education student leadership and afterschool programs.

Education Costs $55,714
Provided security and restricted funds, reducing the increase of membership dues.

Scholarships $44,005
Supported Assisted Living, Camp Chajek, and Jewish Education Programs.

Total Foundation Funding in 2016: $286,890

20% Capital Improvements $21,699
7% Outreach $20,550
5% Miscellaneous $7,829
3% Scholarships $44,005
3% Education $55,714
3% General Operating Costs $134,083

Sponsored Yad Sima Tora, Adath's Outreach Campaign, New All-inclusive School for Students with Special Needs, and Made Adathis beautiful through art and landscaping.
Impact

We hear that word a lot. At JFL, we use the word often. But, what does it really mean? The Merriam-Webster Dictionary defines "impact" in two ways:
1. to hit, strike, or strike against
2. to have a direct effect or impact on

It is in the second definition of the word that best describes what JFL does—on a daily basis. We have a DIRECT EFFECT on our Jewish community. And, we do so, at interest-free loan rates. The interest-free loans available through JFL positively impact the individuals, families, organizations, and small businesses that come to us for assistance. The impact of our loans is felt immediately when someone can receive their water service or avoid eviction because they left our office with a check in hand. The impact of our loans last indefinitely when an individual is able to pursue their educational dreams, a family can grow through IVF or adoption, and a Jewish institution can make building improvements needed to better serve the local community.

The 2017-2018 fiscal year was Jewish Free Loans’ largest and most impactful yet. We distributed $1.1 million in interest-free loans—a 25% increase over last year—and we are poised to continue that growth and momentum in the coming year. It is with great pride—and gratitude to JFL’s friends and supporters—that we share with you the 2017-2018 Year in Review: Impact Report.

513 ACTIVE LOANS
$1,473,127 INTEREST-FREE FUNDS CURRENTLY ON LOAN
$4.6M INTEREST-FREE LOANS MADE IN THE LAST TWENTY YEARS

LOCAL LOANS. INTERNATIONAL IMPACT.
JFL Phoenix is proud to be the new home of the International Association of Jewish Free Loans (IAJFL)—a membership/networking group of more than 45 agencies serving communities around the globe.

DONATION DOLLARS IMPACTING COMMUNITY
116 INTEREST-FREE LOANS TOTALING $637,963

1. NEW HEADQUARTERS FOR THE INTERNATIONAL ASSOCIATION OF JEWISH-FREE LOANS
2. IMPACT BEYOND LOANS
3. FINANCIAL LITERACY WORKSHOPS CONDUCTED IN 2017-2018
4. NAMED LOAN FUNDS PROVIDING INTEREST-FREE LOANS

Borrower Demographics

AVERAGE AGE 43
AVERAGE LOAN $5,500

LOAN TYPE

ECONOMIC CRISIS / EMERGENCY
19%
HOUSING EXPENSES
10%
MEDICAL/DENTAL
9%
WOMEN & CHILDREN IN CRISIS
8%
EDUCATION
8%
JEWISH CONTINUITY
8%
GENERAL (CAR EXPENSES, JCC, SYNAGOGUE, ETC.)
8%
BUSINESS
5%

IMPACT BEYOND LOANS

1. NEW HEADQUARTERS FOR THE INTERNATIONAL ASSOCIATION OF JEWISH-FREE LOANS
2. IMPACT BEYOND LOANS
3. FINANCIAL LITERACY WORKSHOPS CONDUCTED IN 2017-2018
4. NAMED LOAN FUNDS PROVIDING INTEREST-FREE LOANS

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8%
GENERAL (CAR EXPENSES, JCC, SYNAGOGUE, ETC.)
8%
BUSINESS
5%
Impact Report

Greater Miami Jewish Federation
Federation Five

Friday, September 7 | 27 Elul

L'Shanah Tovah Tikatevu 5779!

1. How kids rising on limbs
   From Year to Year

On behalf of the Officers, Board of Directors, and Staff of the Greater Miami Jewish Federation, we extend our sincere wishes to you for a sweet New Year. May you and your loved ones be granted a year of health, happiness, and peace. L'Shanah Tovah Tikatenu! Please take a moment to watch this special video.

2. On Ruth's Hazzanah, we know it is important to take time to remember and reflect upon our own lives and those no longer with us. Joe Feder, Federations Rabbi, Michael "The Jewish Connection for Spiritual Support for Survivors" (a program of our parents) delivered a traditional memorial service, on Sunday, September 18. Community rabbis, cantors and chaplains will be present at various local congregations at scheduled times during the day to help you honor the souls of those who have passed.

3. Federation's International Division recently brought together nearly 76 people for the Passion and Purpose Family Trip. The trip included educational sessions about the agenda funded and programs made possible by donations to the Annual Federation Campaign. The group conducted a Jewish Community Services (JCS) Life & Legacy Program by speaking and sharing with Rabbi Rabbi Nishlheim and local community leaders. They also visited the Miami Jewish Health campus and visited residents. Both JCS and Miami Jewish Health are Federation partner agencies.

4. Yearly donations to the Annual Federation Campaign helped 1,566 campers enjoy camp, Jewish experiences at Camp Bayani this summer in Israel. Hungary. Run by Federation's overseas partner, the American Jewish Joint Distribution Committee (JDC), Gavros brings together Jewish kids from places whose rich heritage once flourished before the Holocaust. For more than a thousand years of Jews, this unique camp is often the youngest first encounter with Judaism. Read more.

5. As the High Holidays approach, it’s important to honor those soldiers, who have served, or are still serving, in the United States military. On Sunday, September 25, a special ceremony will be held at the Miami Beach Convention Center. The ceremony will feature speeches by distinguished military leaders and survivors of the Holocaust.

JewishMiami.org
Donate Now

5/10 Rosh Hashanah
5/16 Fourth Annual Mabors Miami Kever Avot at Local Cemetery
5/18 Yom Kippur
5/24 Sukkot

View the Community Calendar

Shabbat Shalom!
Impact

Benjamin & Bernice Mazin VISUAL ARTS FUND

The Mazin Annual Art Exhibition was conceived and created by Bernice and Benjamin Mazin in partnership with Jewish Community Center’s Visual Arts Committee. The event is funded by the Mazin Visual Arts Fund, Judy and Dennis Hummel and the Mazin family. It is a regional, juried art exhibition of 2-D and 3-D artwork, open to artists 18+ years old. Each year the Mazin Art Exhibition fosters an appreciation of today’s visual arts and reflects the breadth and artistic vision of local artists.

You, too, can create an endowment to preserve Jewish Louisville’s programs and organizations that matter to you. Contact Jennifer Rivlin at 502-238-2719 or jrivlin@jewishlouisville.org to endow your Jewish values.

Drew Corson Youth Athletic SCHOLARSHIP FUND

Established in the memory of Drew Corson, this endowment fund focuses on youth athletics. In 2017, the Drew Corson Youth Athletic Scholarship Fund assisted Louisville in hosting more than 100 Jewish teens from the KIO BBYO region to participate in the Drew Corson Basketball Tournament.

You, too, can create an endowment to preserve Jewish Louisville’s programs and organizations that matter to you. Contact Jennifer Rivlin at 502-238-2719 or jrivlin@jewishlouisville.org to endow your Jewish values.
Stewardship that is Marketing

Ohev Shalom - A Home For Life!
A group of dedicated individuals have committed to guarantee that our beloved Ohev Shalom continues to live on for future generations.

We’ve planned ahead.
Come join us!
Paula Blum
Michelle and Harold Bolson
Jo-An and David Brody
Michelle Napier and David Cook
Amy Slapko Cooper and Rabbi Mark Cooper
Howard Cooperman
Merric and Tony Echeverria
Herbert Fisher
Bernie Froebel
Heidi and Leonard Gapper
Linda Griffin
Barbara and Jerry Gluskin
Reverend N. and Fran Kay
Katherine and Steve Kay
Safran
Theodore Z. and Janie Marrick
Jennifer and Jason Neuer
Louise Rosegrond and Robert Sandor
Amy Romanow Schachter
Cynthia and Arthur Schachter
June and Michael Schachter
Norma Schachter
Paul Schonberger
Sue Schlossman
Susan Statler and Stuart Statler
Sue and R. S. Schiller
Amy and Richard Shiller
Sally and Todd Shechter
Linda Weiner
Anonymous (14)

Create Your Jewish Legacy
Thank you to the following legacy donors who have already submitted a letter of intent to CHSL, ensuring the continuity of Cincinnati Hebrew Day School’s important mission.

Ghosh and Sharon Barry
Alan and Pauline Gogol
Yehiel and Sarah Fishman
Tami Frenkel
Joni Hoffman
Der and Angela Katz
Huzay and Miriam Kamen
Howard and Marlene Mayerson
Morten Family
Yakov and Yael Perlman
Anonymous

Now Is the Time, Createyourjewishlegacy.org
Contact Rabbis Der (513) 771-7311 or Frenkel (513) 771-7311

Stewardship that is Marketing

CONGREGATION KENESETH ISRAEL
L’Dor Vador Society

Congregation KeneSeth Israel is proud to announce that the following members listed here have made a commitment to leave a legacy gift to the KF Endowment Fund in their wills, trusts, retirement accounts or life insurance policies as participants in the KF L’Dor Vador Society campaign. We extend our deepest appreciation to those who have helped to ensure the future of KF by leaving a legacy, which will continue beyond their lifetimes. We invite the rest of the Congregation to join them as the campaign continues. Please contact Vicki Dunn at 610-435-9704 or vikidunn@khevra for more information.

ROSS BORN
WENDY BORN
LAM CARLS
PAT CARLS
EDWIN DAVIS
RABBI MELODY DAVIS
DAVE EISKOWITZ
LEN GLAZIER
BJRIA GLAZIER
SANDRA GOLDARB
KEN KIRSHNER
SUE KIRSHNER
LINDA MILLER
MIKE MILLER
RABBI ETT PHILLIPS
ROB ROCHMAKER
AMIE STEWART

LACK VALLEY JEWISH FOUNDATION
LIFETE & LEGACY
CONGREGATION KENESETH ISRAEL
L’DOR VADOR SOCIETY
Why We Chose to Create a Jewish Legacy

By Dana Reznik

We feel honored to be part of Temple Judea and the 180° Legacy Society. In order to live a life of meaning and purpose, we believe it is important to leave a legacy that will contribute to the world. The 180° Legacy Society offers an opportunity to create a Jewish Legacy that will benefit our community and future generations.

Please join us in creating a Jewish Legacy that will endure for generations to come.

Create a Jewish Legacy

But change is a journey. One that is ongoing, evolving, and never-ending. It requires a commitment to the values that matter most to us as individuals and as a collective. To find the courage to take the first step, and to continue on that journey, is to create a Jewish Legacy.

What will your legacy be?

If you would like to learn more about how your family can be a part of ensuring Jewish future generations contact Daniela Merz. Director of Development EMD Mailing: 180° Legacy Society 9015 S. Sepulveda Blvd Suite 105 Santa Monica, CA 90405 Phone: (310) 454-4800 Email: Daniela.Merz@TempleJudea.org

Marketing & Stewardship

Creating Your Jewish Legacy

We are proud to announce our esteemed Legacy Dinner on Saturday, April 7, 2018.

You are invited...

180° Legacy Society Shabbat
Saturday, April 7, 2018

The Temple Judea | 9015 S. Sepulveda Blvd | Santa Monica, CA 90405

Join us as we celebrate the 180° Legacy Society and the Legacy Dinner. A special tribute will be made to those who have made a significant impact on our community.

We look forward to seeing you there.

Dana Reznik

Executive Director
What 2 new things can you do in the coming year to steward your current legacy donors?
Integrate into all fundraising appeals
• All fundraising appeals should include, at a minimum, a place for donors to express interest in learning more about your legacy program or legacy society.

• Integrate the legacy conversation into all annual, capital or endowment campaign conversations.
Continue Transition to a Culture of Philanthropy

Philanthropy –
“A love of human kind and a voluntary joining of resources and action for the public good”

Four core components:
• Shared responsibility for development
• Integration and alignment of mission
• Focus on fundraising as engagement
• Strong donor relations/stewardship
What is a Culture of Philanthropy?

Every single person in the organization is engaged in securing financial support and agrees that it’s an important priority.

Everyone conveys a positive attitude towards philanthropy by
• Being donor-centric
• Providing opportunities for engagement
• Building relationships
• Sharing excitement for the organization, the mission and the impact the funds will have

-Nanette Fridman, Fridman Strategies
Continue Transition to a Culture of Philanthropy

<table>
<thead>
<tr>
<th>In A Fundraising Culture...</th>
<th>In A Culture of Philanthropy...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philanthropy = gifts by institutions or gifts from wealthy individuals.</td>
<td>Philanthropy = role of everyone.</td>
</tr>
<tr>
<td>Development staff is responsible for revenue generation.</td>
<td>Everyone in the organization shares some responsibility for revenue generation by serving as ambassadors and building relationships with potential donors and constituents.</td>
</tr>
<tr>
<td>It’s all about the money.</td>
<td>It’s all about the relationships.</td>
</tr>
<tr>
<td>Donors = money.</td>
<td>Donors = skills, talents, time, and money.</td>
</tr>
<tr>
<td>Volunteers are contacted only when money is needed.</td>
<td>Donors are contacted regularly in invitations to participate in activities, progress updates, and information about what’s important.</td>
</tr>
<tr>
<td>Fundraising and engagement are siloed and have different contact lists.</td>
<td>There is a list for every person who’s affiliated with the organization in some way (e.g., volunteering, donating, organizing, etc.).</td>
</tr>
<tr>
<td>Fundraising is seen as a one-off of addition.</td>
<td>Fundraising is incorporated into and across every part of the organization.</td>
</tr>
<tr>
<td>Culture is seen as “fuzzy fift.”</td>
<td>Culture is the most important factor in determining an organization’s effectiveness.</td>
</tr>
</tbody>
</table>

The board relinquishes the development committee. The board development committee directs the participation of the entire board in fundraising.

It’s about acquiring donors. It’s about keeping donors.

Mission, program goals, and operations are separate from revenue generation. Mission, program goals, and operations are aligned with revenue generation.

The focus is on short-term tactics like appeals and events. The focus is on the longer-term strategy behind the tactics.

The organization functions with a scarcity mindset. The organization functions with a mindset of abundance.

The organization’s leaders make decisions based on what’s available. The organization’s leaders make decisions based on what the community needs and a shared vision of how to meet that need.

The community isn’t engaged. The community is intentionally engaged and participates as a partner with the organization.

Development staff/directors are relegated to secondary status. Development staff/directors are part of the leadership team and equal partners with other senior staff in participating in planning, strategy, financial, and organizational overviews.

Development goals aren’t part of everyone’s job description. Development goals are part of everyone’s job description.

Board and staff have separate contact. Board and staff have regular opportunities to engage and interact.

The focus is on big gifts. All gifts are important.

Donations come first. Donations come after we engage people in our work.

We win with every donor for any organization. We will listen and refer donors to other organizations that align more closely with their aspirations.

Money is dirty. Money is what we need to do our work.

There are rigid lines between organizational departments, including development. Job responsibilities and departments are more fluid, more collaboration to meet goals.
2 new steps you can take NOW for long-term sustainability
“Don’t judge each day by the harvest you reap but by the SEEDS you plant”

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

- Taanit 23a

Sustaining Your Legacy Program

Arlene D. Schiff – November 2018
Harold Grinspoon Foundation