

Accelerating Endowment Building



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

-Talmud, Ta'anit 23a

Tamra L. Dollin * April 2024 * JCamp180 Endowment Accelerator

Life & Legacy
ASSURE JEWISH TOMORROWS



**What are you hoping
to learn today?**

Endowment + Legacy



"Your legacy is every life you've touched."

-Maya Angelou



5 Tips to Endowment Success!

- ***Identify*** top 20 prospects
- ***Market*** the Opportunity
- ***Share*** stories
- ***Ask!***
- ***Thank*** and ***steward***



A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of blue, located on the left side of the image.

Identify Prospects

Identify Top 20 Prospects

- Board
- Past Presidents
- Donors 10+ years
- Alumni
- Staff
- Volunteers
- Existing Fund Holders



A stylized graphic of a flame or fire, composed of several overlapping, curved shapes in shades of blue, located on the left side of the image.

Marketing

Get the Message Out

- Add to existing materials (magic boxes)
- Ads, Newsletter, News
- Events, parlor meetings
- Legacy Society
- Listing
- Visits
- Website
- Targeted letter



Marketing = Israel's Drip Irrigation



Good Messaging is Consistent

- **Repeat** the message
- Use a **variety** of channels
- **Change** the message



Use Your Website



Charles E Smith Jewish
Day School, Rockville, MD

← Click button to make gift

← Listing of Donors

← Testimonials

← Clicks to learn more

Good Messaging is Donor Centric



Organization Centric

“We did this. We did that. We were amazing.
Oh, by the way, thanks.”



Donor CENTRIC

“With your help, all these amazing things happened.
Without your help, they wouldn't have.”



Use Your Newsletter

- Regularly **vary** the content
- Include **clear** contact information
- Send **News** when you have it!



HILLEL ACADEMY

Tampa Bay's Premier Jewish Community Day School
TK 4 through 8th Grade

Hillel Academy Plans for the Future

In August 2014, the Tampa Orlando Florida Jewish Foundation (TOF) was selected to participate in a two-year program funded by the Harold Grinspoon Foundation. The program's goal is to prioritize permanently matched grants as the primary gifts for the benefit of community agencies.

While all Jewish organizations across the Tampa Bay region will benefit from the heightened visibility of legacy giving, these organizations including Hillel Academy are participating in an intensive training and partnership with TOF.

This partnership gives the participating organizations the opportunity to each be granted \$12,000 by TOF if they meet their goal of obtaining \$1 million of total in both of the two years of the program.

Our school has already received 5 legacy gifts totaling over \$575,000 in bequest funds. This is a meaningful way for individuals and families to make a gift to Hillel Academy with no monetary commitment needed today.

What better way to ensure a solid future for our community's Day School? We thank those who have participated in Life

A Legacy to Date and we look forward to talking with many of you in the near future.

I wish everyone a joyful summer and the staff and faculty will see you again when school begins in August!

Any Where
Head of School, Hillel Academy

Gradeschools Adellek Shubert and Susan Permen with their grandchildren, David Ben, Malika Shubert, Dana Permen, Abby Permen and Julia Permen. Photo By: Sam Permen. Gabe Permen, Jake Permen and Gil Permen.

Hillel Academy Welcomes New Staff Members

Introducing Lydia Abrams

In January 2015 Hillel Academy's Head of School was pleased to announce that Lydia Abrams, a licensed clinical social worker, joined the staff as the new school guidance counselor. Mrs. Abrams has been in the social work field for almost twenty years and has extensive experience working with children, adults and

of Advancement. Mrs. Kelly will be supporting the school's partnership with the TOF Foundation Life & Legacy Program, the Hillel Academy Annual Fund, Gift of Gold and other fundraising activities.

Mrs. Kelly was previously with the University of South Florida as Assistant Director of a multi-million dollar university-wide capital campaign. While at USF, she also served in positions of Assistant Director of Engagement for the College of Education and Assistant Director of Planned Giving.

Mrs. Kelly is a Tampa native and is active in the Tampa Bay community. She currently serves on the Board of Trustees for the David A. Straz Jr. Center for the Performing Arts and the St. Joseph's Hospital Foundation. Mrs. Kelly holds a Juris Doctor degree from Stetson University College of Law and a Bachelor of Science degree from Northwestern University.

Kelly Shimberg Kelly

Introducing Kasey Shimberg Kelly

Kasey Shimberg Kelly has been hired as Hillel Academy's Director

In addition to working with Hillel Academy, Mrs. Abrams is co-owner of ProTherapyPlus - Carrollwood Grove, and she is an adjunct instructor for the University of South Florida School of Social Work.

Lydia Abrams

IN THIS ISSUE

- NEW ADDITIONS
- TRADITIONS CONTINUE
- TRAVEL EXPERIENCES
- GIVING
- CONGRATULATING

SUMMER 2015

Mission Statement

Hillel Academy is accredited by the Florida Council of Independent Schools (FCIS) and the Florida Education Council (FEC) and is a member of the Jewish Community Day School Network and the National Association of Independent Schools (NAIS). The school is recognized by the U.S. Dept. of Education as a Blue Ribbon School.

Hillel Academy offers morning bus service from North Pasco county and South Tampa.

Hillel Academy | 2020 W. Fletcher Avenue, Tampa, Florida 33612 | 813-963-2242
www.hillelacademytampa.org
 Follow Hillel Academy on Facebook



Share Stories

Share Testimonials

YOUR LIFE YOUR LEGACY

"My grandfather gave unconditionally. He didn't need to know where the money was going. He trusted it would go where it was needed most. Today, organizations that mattered to him during his lifetime will share his legacy. I think it's wonderful that someone can make such a significant gift through careful estate planning."

- ROZLYN DRUCKMAN, granddaughter of Hyman Druckman z"l



Share Impact



Seeing images that demonstrate **IMPACT** is the most persuasive element in deciding to make an endowment gift

Use Social Media

Use Past Photos

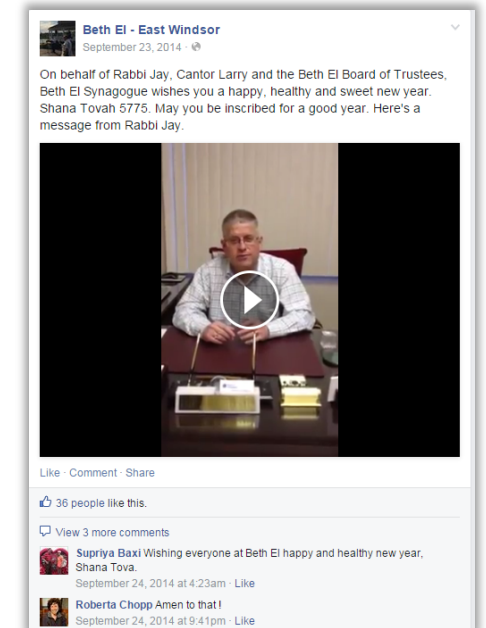


Can you identify any of these confirmands of 1992?



Video

Direct to Website



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Ask!

Motivation

#1 Reason people don't give?

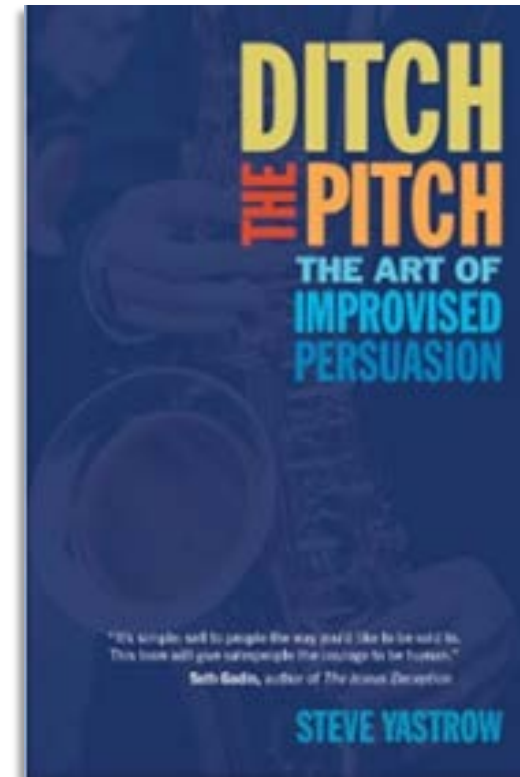
They weren't asked

% of donors who made a legacy gift **because** they were asked

70%

The Endowment Conversation

- **No Script**
- **Values-Based Conversation**
- **Ask!**



Uncover Their Story

Ask Questions and LISTEN:



- *What led you to make your first gift to camp?*
- *What moves you to be such a loyal donor?*
- *What is the most meaningful experience you have had with us?*
- *What is it that we do that you would like to see continue long into the future?*
- *When you think about having a flourishing camp 40 years from now, what do you envision?*

Invite

Will you join me in making an endowment gift to our camp?



Be quiet and wait...



Steward Over Time

Stewardship



Great Stewardship is...
when your donors know that they **MATTER** to you!

Deepen Relationship



Key things to remember

- **Stewardship is critical to your success**
- Donors have choices – Why choose you?
- Donors are **long-term investors**
- **Stay connected and show appreciation**
- Requires resources

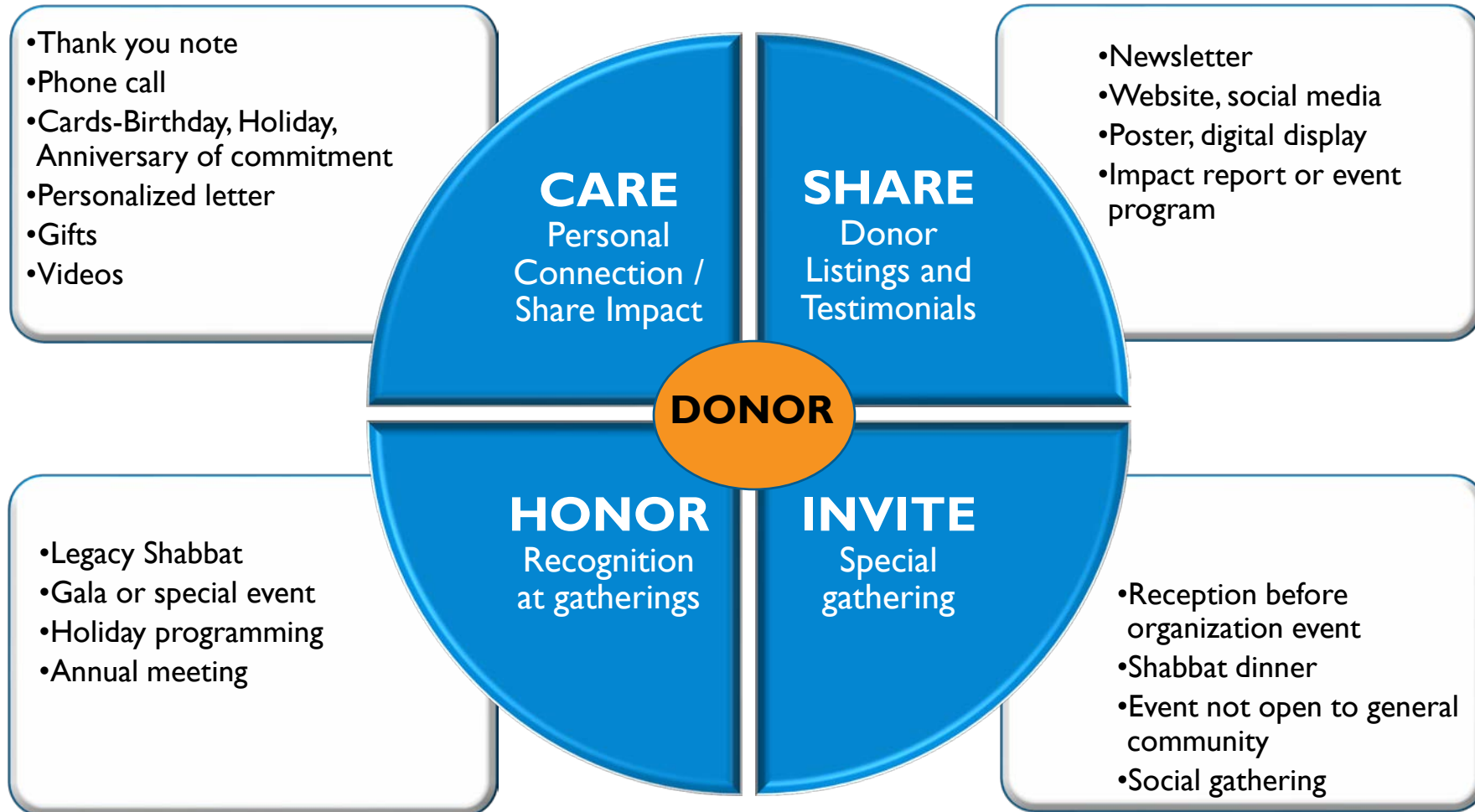


How to Steward?



- CARE
- SHARE
- HONOR
- INVITE

Effective Stewardship



CARE



SHARE



The Story of ONE

*“Thank you for the Incentive Award from the **Sidney and Irene Levin Family Scholarship and Education Fund** you gave me to attend **Herzl Camp** this summer. I was in a cabin with many of my friends and had a great time.”*

*Sincerely, Ben Borenstein
(standing in the center)*

Acknowledge, Recognize Donors



Investor Report

Kayitz 2023
BY THE NUMBERS

101
\$224,077
spent on food and food services

430+
campers served

160+
college-age staff worked at camp

3,607 nights
sleeping in tents on *masa'ot* (excursions)

30 states
US campers came from

IT STARTS WITH JOY
שמחה

"The girls' strong, independent, and spiritual character has been formed by Rockies, and I know they will take Rockies with them forever."
2023 CAMPER PARENT

donate now!

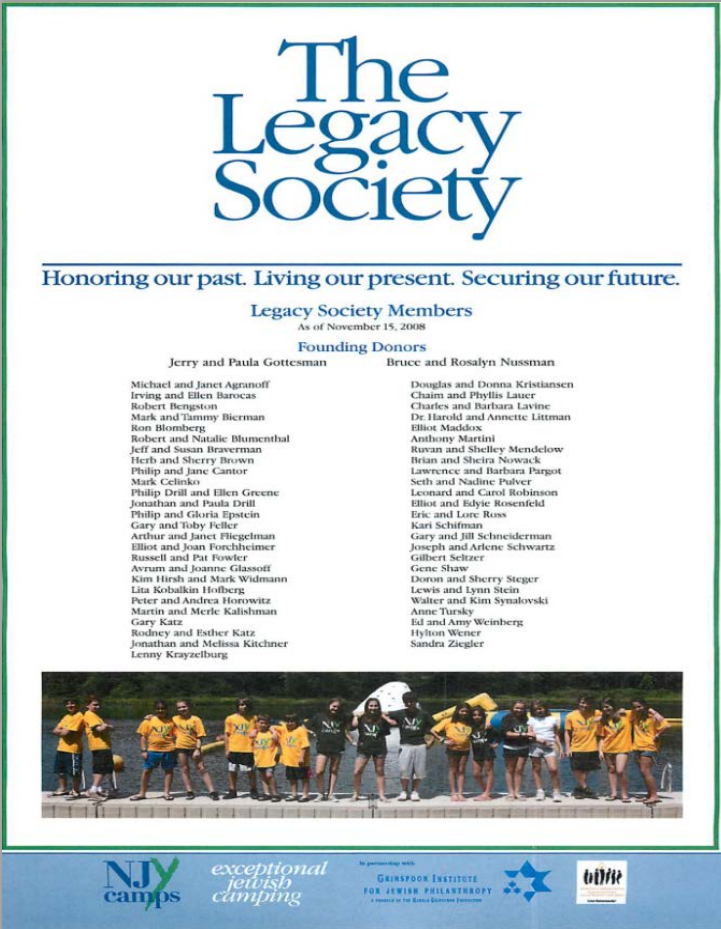
Ramah in the Rockies
אחגור אברהם

300 S Dahlia Street, Suite 205 | Denver, CO 80246
www.ramahoutdoors.org
(303) 261-8214
info@ramahoutdoors.org

Ramah in the Rockies is a Colorado 501(c)3 public charity.
Tax ID #20-4078988

our core values
JOY שמחה | CONNECTIONS
GROWTH צמיחה אישית | RESPECT

Listings




The Legacy Society

Honoring our past. Living our present. Securing our future.

Legacy Society Members
As of November 15, 2008


Founding Donors

Jerry and Paula Gottesman	Bruce and Rosalyn Nussman
Michael and Janet Agronoff	Douglas and Donna Kristiansen
Irving and Ellen Barocas	Chaim and Phyllis Lauer
Robert Bengston	Charles and Barbara Lavine
Mark and Tammy Bierman	Dr. Harold and Annette Littman
Ron Bloomberg	Eliot Maddox
Robert and Natalie Blumenthal	Anthony Martini
Jeff and Susan Braverman	Ruvan and Shelley Mendelow
Herb and Sherry Brown	Brian and Shera Nowack
Philip and Jane Cantor	Lawrence and Barbara Pargot
Mark Celinko	Seth and Nadine Pulver
Philip Drill and Ellen Greene	Leonard and Carol Robinson
Jonathan and Paula Drill	Eliot and Edyie Rosenfeld
Philip and Gloria Epstein	Eric and Lore Russ
Gary and Toby Keller	Karl Schifman
Arthur and Janet Flegelman	Gary and Jill Schneiderman
Eliot and Joan Forchheimer	Joseph and Arlene Schwartz
Russell and Pat Fowler	Gilbert Seltzer
Avrum and Joanne Glassoff	Gene Shaw
Kim Hirsch and Mark Widmann	Doron and Sherry Steger
Lita Kobalicki Holberg	Lewis and Lynn Stein
Peter and Andrea Horowitz	Walter and Kim Synalowski
Martin and Merle Kalishman	Anne Tursky
Gary Katz	Ed and Amy Weinberg
Rodney and Esther Katz	Hilton Wiener
Jonathan and Melissa Kitchner	Sandra Ziegler
Lenny Kravtzeburg	



NJ camps exceptional jewish camping

in partnership with: **GRANDPOOR INSTITUTE FOR JEWISH PHILANTHROPY** A Division of The Jewish Education Foundation



Using the tagline makes it double as marketing



You can join too!

There is room for your name here

Please join us!



CREATE your LEGACY




Since January 2013, over fifty Baron Hirsch families have made a commitment that they will work towards a legacy commitment to benefit Baron Hirsch. Many others have made a significant gift to our congregation's 150th Anniversary Endowment Campaign. Below, we list all of those who have agreed to participate in one of these programs.

If you would like to be a part of this effort to secure our future, please contact one of our leaders today. We would be more than happy to include you in this growing list of legacy supporters.



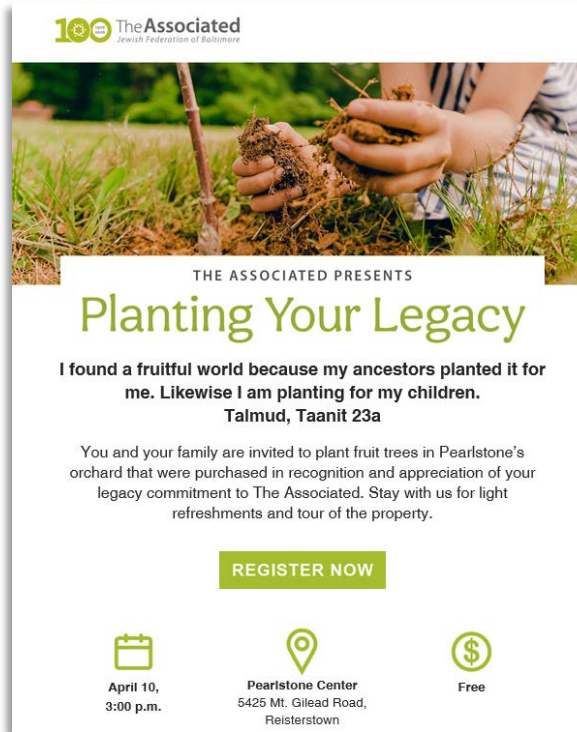
Marvin Ballin	Julie & Adam Groveman	Judy & Larry Moss
Joan & Phillip Baum	Jan & Marc Hanover	Susan Myers
Belz Family Foundation	Jerry Hanover*	Erin Ostrow
Marilyn & Jack Belz	Marcia & Allan Hayden	Cori & Rabbi Brett Ozman
Anise & Ron Belz	Elana & Josh Kahane	Lyda Parker
Julie & Marty Belz	Anat & Cantor Ricky Kampf	Eileen & Marvin* Posner
Lynn* Belz	Jane & Jerome Kaplan	Patricia & Louis Safier
Shelly & Gary Belz	Leora & Naftali Klein	Elaine & Irvin Skopp
Rita Bozina	David Kotler	Shayna & Brad Somer
Joanne & Bobby Cohen	Judy & Morris Kriger	Emily & Alvin Steinberg
Sandy & Harris Cohen	Joyce & Sidney Levine	Jessica & Alex Sukhodolsky
Aileen & Pace Cooper	Nancy & Michael Levinson	Ellen & Ellis Tevin
Nancy & Sheldon Dan	Betsy & Steve Libby	Sarah & Naftali Thomas
Madelyne & Jay Daneman	Ira Lipsey	Wendy & Morris Thomas
Tami & Bob Eiseman	Sue Ann & Bernard Lipsey	Stacey & Scott Vogel
Bilha & Rabbi Shai Finkelstein	Nancy Lipsey	Alyse Wagner
Chany & David Fleischacker	Barbara & Earl Magdovitz	Cathy & Craig Weiss
Natalie & Jerry Frazer	Evelyn & Jerome Makowsky	Sarah & Jon Wogan
Esther* & Jack* Forman	Andie & Sidney Mendelson	Judy & Harold* Wormser
Carmen Graves	Diane & Paul Mendelson	Diane & Larry Wruble
Rayna & Michael Greenberg	Tracey & David Mendelson	Plus 12 anonymous donors
Mimi & Ron* Grossman	Elaine & Fred Miner	* of blessed memory
Jan & Andy Groveman	Jeri & Mitch Moskowitz	

HONOR

Verbal 'thank you' is also a **Marketing opportunity**



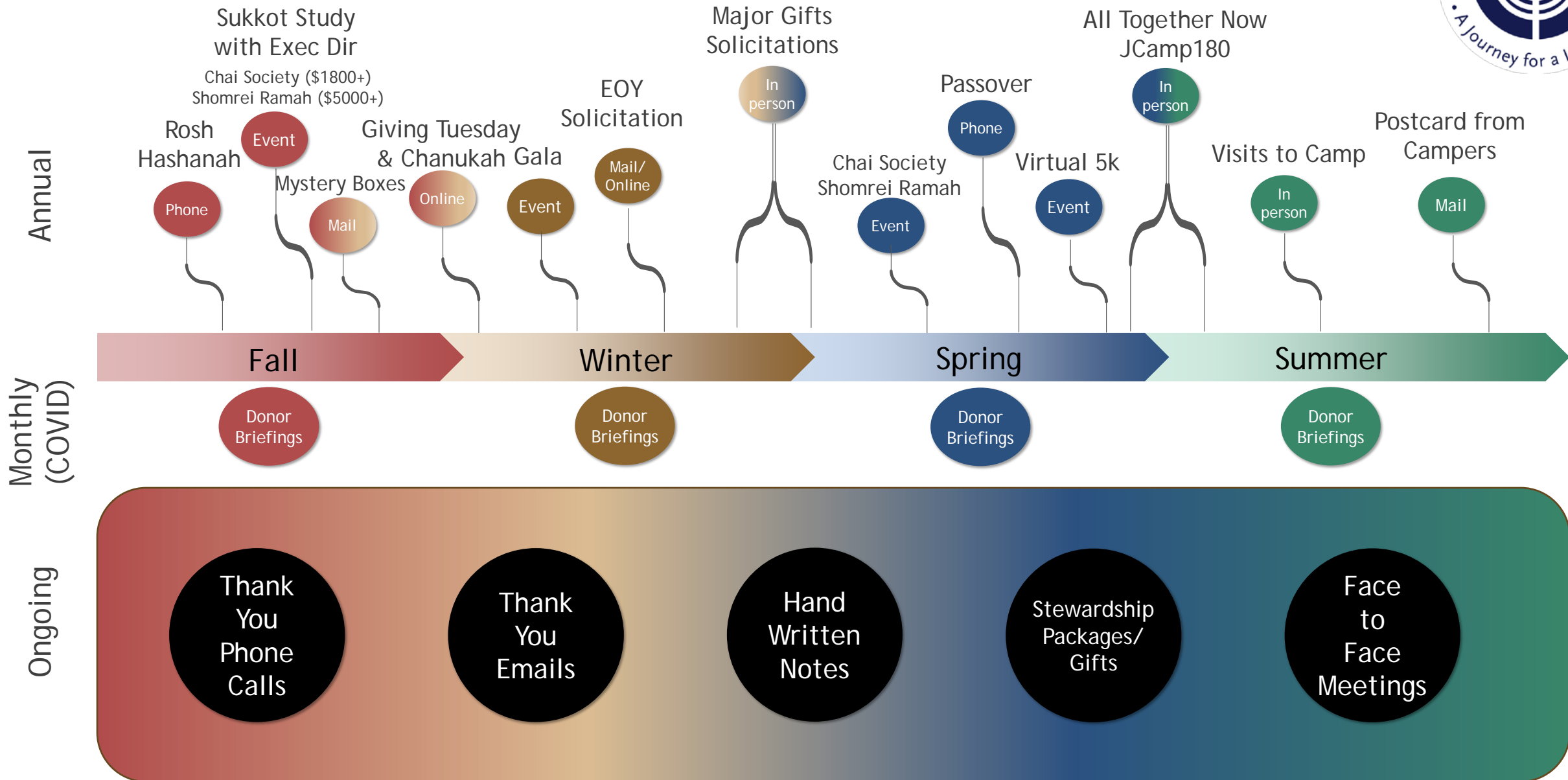
INVITE



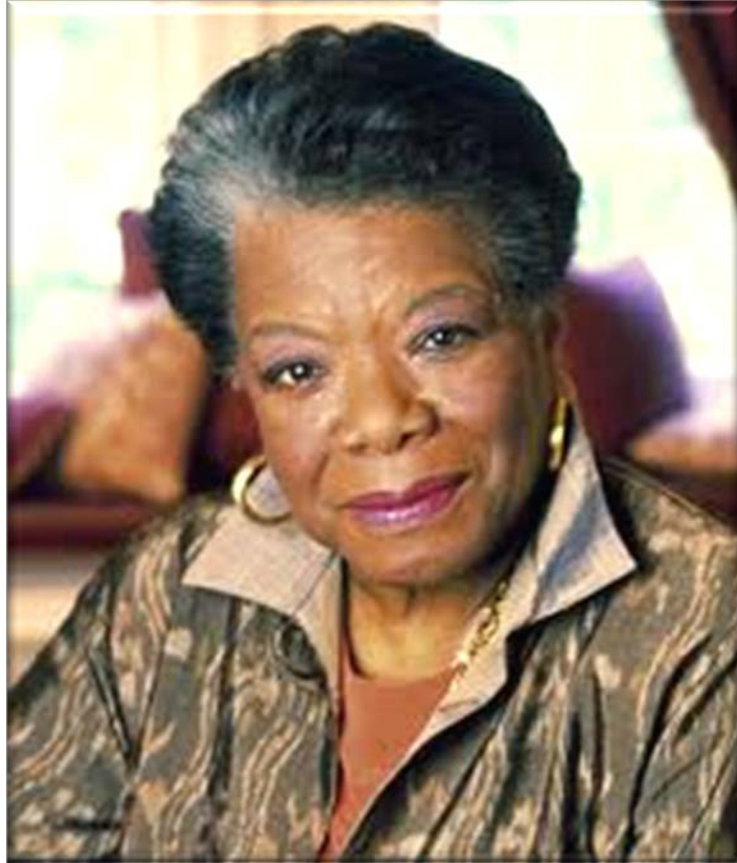
Cocktail reception * Shabbat dinner * Visitor's Day * Special gathering



RAMAH IN CALIFORNIA'S ANNUAL STEWARDSHIP CYCLE



Final Words on Stewardship



I've learned that people will forget what you said, people will forget what you did, but *people will never forget how you made them feel.*

-Maya Angelou

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