



## Overview

This program works with synagogues, agencies, and day schools to promote after-lifetime giving to directly benefit their organizations. It is supported in Greater MetroWest by the Jewish Community Foundation (JCF) & Federation. Through **training, marketing, incentive grants, and ongoing support**, partners are taught ways to develop a prospect list, secure legacy gifts, steward their donors, and integrate legacy giving into the philanthropic culture of their organization and of our community. Since legacy gifts are only realized after a donor passes away, Create a Jewish Legacy gives people the beautiful opportunity to do something significant to secure the organizations they care about without diminishing the funds available to them during their lifetimes. Twenty-three local partners were chosen through competitive application processes. As of May 2019 our community partners have secured **1,013** legacy gifts with an estimated future value over **\$29 million**.

## Basic Requirements for Organizations Wishing to Participate in the Program

- \* Obtain your board's approval to apply, and its commitment to follow through, before submitting your application
- \* Name a Legacy Team of at least five members including one paid staff member from your organization
- \* Commit to attending three or four training sessions in the first year of the program (all or most team members)
- \* Have a method of managing donor information, conversations, commitments and gifts
- \* Commit to placing the gifts you receive with the Jewish Community Foundation of Greater MetroWest (JCF)
- \* Agree to develop a Legacy and Stewardship Plan (with guidance and support from JCF) and to meet its goals
- \* Submit Excel-based reports to JCF according to a quarterly schedule
- \* Commit to having these important legacy conversations with your members, donors and other supporters!

## Obligations of the Jewish Community Foundation (JCF) to the Selected Organizations

- \* Offer high quality group training sessions and periodic individual team meetings
- \* Assist each partner to develop a Legacy Plan and set defined, measurable goals
- \* Provide marketing to the broader community about CJL and marketing templates to the individual partners
- \* Recognize, celebrate and thank all CJL donors (with their consent) on behalf of the GMW community
- \* Provide planned giving expertise as requested and as appropriate
- \* Celebrate your success at the end of each of the first four years, at a minimum

## Benefits to the Organizations of Participating in *Create a Jewish Legacy*

- \* Training and a comprehensive set of tools and support on topics such as identifying potential legacy donors, having important conversations, obtaining legacy commitments, marketing, and stewarding donors

- \* Marketing materials and assistance
- \* Incentive grant from the JCF if goals are reached by the end of the first program year (pending JCF Board approval)
- \* Increased ability to plan for the future based on the legacy commitments you obtain
- \* The satisfaction of being pro-active to ensure a vibrant future for your organization and for our community

**Create a Jewish Legacy Participating Organizations** (as of February 2019)

Adath Shalom, Morris Plains  
 Bnai Keshet, Montclair  
 Congregation Agudath Israel, Caldwell  
 Congregation Beth Israel, Scotch Plains  
 Congregation B'nai Israel, Millburn  
 Congregation Ohr Shalom-Summit JCC, Summit  
 JCC of Central NJ, Scotch Plains  
 Jewish Community Housing Corporation (JCHC), West Orange (inactive)  
 Jewish Educational Center, Elizabeth (inactive)  
 Jewish Family Service of Central NJ  
 Jewish Family Service of MetroWest NJ  
 Jewish Service for the Developmentally Disabled of MetroWest  
 Morristown Jewish Center Beit Yisrael, Morristown  
 Mt. Freedom Jewish Center, Randolph  
 Oheb Shalom Congregation, South Orange  
 Temple B'nai Or, Morristown  
 Temple Beth Ahm Yisrael, Springfield  
 Temple Beth O'r Beth Torah, Clark  
 Temple Beth Shalom, Livingston  
 Temple Beth-El Mekor Chayim, Cranford  
 Temple Emanu-El, Westfield  
 Temple Sinai, Summit  
 YM-YWHA of Union County

*Create a Jewish Legacy* began as a partnership program with the Harold Grinspoon Foundation. Greater MetroWest is proud to have been the 15<sup>th</sup> community in North America selected to participate. There are now 58 participating communities. At this point in time CJL is fully supported by the Jewish Community Foundation of Greater MetroWest NJ. **For more information contact Karen Secular, Program Manager, [ksecular@jfedgmw.org](mailto:ksecular@jfedgmw.org) or 973-929-2918.**