

Thank you for applying to participate in the third cohort of the Jewish United Fund's **Create a Jewish Legacy** initiative. The program is a results-oriented, two-year endowment-building program that promotes legacy giving to *local* Jewish day schools, synagogues, social service organizations and other Jewish entities.

**We will have a Create a Jewish Legacy informational meeting at the Jewish United Fund on Thursday, February 8, at 9:00 a.m. To RSVP, please email Tamar Wolf, Program Manager of Create a Jewish Legacy, at [TamarWolf@juf.org](mailto:TamarWolf@juf.org) by Tuesday, January 30.**

Through training, support and monetary incentives, Create a Jewish Legacy motivates Jewish organizations to focus on endowment-building, steward donors and integrate legacy giving into their philanthropic culture. In doing so, we all achieve our shared goal of a vibrant Jewish life in Chicago today and for future generations. The program has proven successful in its first and second cohorts, helping 30 partner organizations raise over \$29 million from more than 1,080 commitments.

JUF's Create a Jewish Legacy staff provides training, consulting and marketing assistance along with a \$20,000 incentive grant over a two-year period: one half payable upon reaching defined measurable goals at the end of Year 1; and one half payable upon successful completion of the two-year program. We hope the incentive grant will encourage your organization to prioritize legacy giving and integrate it into the philanthropic culture of your organization.

**The following goals must be met to receive the incentive grants:** secure a minimum of 18 signed Declarations of Intent per year, use the Create a Jewish Legacy community-wide Declaration of Intent, have organizational representation at each training, update the Create a Jewish Legacy web database quarterly, and establish a board-approved written endowment policy stating that legacy gifts will be directed to the endowment.

Decisions about whether gifts meet program criteria, on achievement of goals and other program issues will be made by Create a Jewish Legacy staff and lay leaders.

Participation in this initiative requires attendance at group and individual sessions by a legacy team made up of three to five individuals, including the Executive Director/Rabbi/Head of School, Development Director (if applicable) and a minimum of two lay leaders. Additionally, team members should prepare to actively participate in soliciting and following up with prospects and donors.

Gifts secured through the program must be used by participants to build their endowment funds so that they will have the resources to thrive in the future. The Board of Directors will need to adopt a policy stating that **all gifts secured through the Create a Jewish Legacy program will be used for an endowment.**

All decisions on who shall participate in the program will be made by the Steering Committee. Applicants understand that the Steering Committee will use its best efforts to make fair decisions while realizing that a maximum of seven organizations will be accepted into the program based on available resources. Local offices of national organizations and organizations that have previously participated in JUF's Create a Jewish Legacy program are not eligible to apply. JUF will offer community classes once each year for organizations not in the program.

**Applications are due by 5:00 p.m. on March 15, 2018, through any of the methods listed below:**

**Email:** [TamarWolf@juf.org](mailto:TamarWolf@juf.org)

**Fax:** 312-855-3284

**Mail:** Tamar Wolf

Jewish United Fund/Jewish Federation of Metropolitan Chicago  
Suite 3071  
30 South Wells Street  
Chicago, IL 60606

Please feel free to contact Tamar Wolf at 312-357-4963 or [TamarWolf@juf.org](mailto:TamarWolf@juf.org) with any questions.

*Create a Jewish Legacy is made possible by a grant from the Crown Family.*



Acceptance as a Create a Jewish Legacy partner will be based on the following set of criteria:

- Stability of organization and senior professionals
- Active and committed lay leadership
- Fiscal responsibility
- Fundraising capacity of organization
- Giving capacity of members/friends/donors
- Board willingness to give a legacy gift and participate in legacy efforts
- Create a Jewish Legacy lay leadership and professional team in place
- Commitment by legacy team to attend all Create a Jewish Legacy trainings and team meetings
- Agreement to establish an endowment policy directing legacy gifts into the endowment
- Agreement to follow Create a Jewish Legacy marketing guidelines and to use the Create a Jewish Legacy community-wide Declaration of Intent
- Commitment to incorporate legacy giving into the organization's culture and marketing presence
- Timely submission of completed application



### **What is Create a Jewish Legacy?**

Create a Jewish Legacy is a two-year program to help local Jewish organizations obtain legacy gifts, which include bequests, endowment gifts and other planned gifts, to contribute to their endowment funds. This program includes training classes, marketing assistance, best practices and incentive grants for participants who meet their goals. Create a Jewish Legacy is made possible by a grant from the Crown Family.

### **Who is eligible to participate?**

Local Jewish organizations such as synagogues, day schools and agencies are encouraged to apply. Agencies and day schools that are already part of the Jewish Federation's endowment program can also participate. A maximum of seven organizations will be chosen through an application process with decisions made by a steering committee of community leaders. Local offices of national organizations and organizations that have previously participated in JUF's Create a Jewish Legacy program are not eligible to apply. JUF will offer community classes once each year for organizations not in the program.

### **What are the benefits of participating?**

- A comprehensive educational curriculum with topics such as having legacy conversations, marketing, stewardship and best practices.
- Participants are eligible for a \$10,000 (per year) incentive grant for reaching program goals.
- Increased legacy gifts to build the organization's endowment.

### **What are the requirements to participate in the program?**

- Stability of organization and senior professionals
- Active and committed lay leadership
- Fiscal responsibility
- Fundraising capacity of organization
- Giving capacity of members/friends/donors
- Board willingness to give a legacy gift and participate in legacy efforts
- Create a Jewish Legacy lay leadership and professional team in place
- Commitment of legacy team to attend all Create a Jewish Legacy trainings and team meetings
- Agreement to establish an endowment policy directing legacy gifts into the endowment
- Agreement to follow Create a Jewish Legacy marketing guidelines and use the Create a Jewish Legacy community-wide Declaration of Intent
- Commitment to incorporate legacy giving into the organization's culture and marketing presence
- Submit the application by March 15, 2018

## Training Schedule for Year 1\*

The training schedule below will be mandatory for each participating organization. At least two people from each organization's Create a Jewish Legacy team are required to attend. Most meetings will take place at JUF's Lillian and Larry Goodman Conference Center. The training schedule for Year 2 will be released well in advance of the dates.

July 19, 2018	Writing Your Legacy Plan & Prospecting	9–11 a.m.
October 9, 2018	Making the Ask	9–11 a.m.
December 11, 2018	Marketing Your Legacy Program & Stewardship	9–11 a.m.
February 7, 2019	Giving Vehicles	9–11 a.m.
April 11, 2019	TBD	9–11 a.m.
July 16, 2019	End of Year Celebration	

*\*Subject to change*

## Why the Jewish United Fund?

JUF has grown its endowment fund to over \$1 billion and has already helped numerous Jewish organizations create and build their own endowment funds. Through generous funders, JUF has the opportunity to help Chicago Jewish organizations grow their own endowments and secure legacy gifts.

## What are the benefits to JUF?

The entire Jewish community benefits from a campaign centered on legacy giving. The added leadership and marketing of this effort will help raise awareness of the importance of endowments and of securing legacy gifts from both current and new donors.

## What is the role of JUF?

JUF manages the program through a dedicated staff person and a lay steering committee. The staff will organize training classes, related events, and provide coaching to participants in order to ensure success. Decisions on whether a gift meets program criteria is made by Create a Jewish Legacy staff and lay leaders.

## Will JUF make solicitations for participants?

No. JUF will help with training, prospecting and supporting each partner organization's team. Volunteers and staff are expected to have conversations with their most loyal donors. Participating organizations' donor information will not be shared or added to JUF's database.

## Do gifts secured in the program need to go into the participating organization's endowment?

Yes. Gifts secured through the program are to be used by participants to build their endowment funds so they will have the resources to thrive in the future. The Board of Directors will need to adopt a policy stating that all gifts secured through the Create a Jewish Legacy program will be used for an endowment.

## Who do I contact for more information?

For all inquiries, contact Tamar Wolf, Program Manager of Create a Jewish Legacy, at 312-357-4963 or by email at [TamarWolf@juf.org](mailto:TamarWolf@juf.org).



*Applications are due by 5:00 p.m. on March 15, 2018. Please attach additional pages if needed.*

If you cannot fill out and save this PDF with Adobe Acrobat, **CLICK HERE** to download the Microsoft Word version.

NAME OF ORGANIZATION: \_\_\_\_\_ YEAR ESTABLISHED: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_ WEBSITE: \_\_\_\_\_

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ACCREDITATION INFORMATION AND/OR AFFILIATION: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

.....  
CONTACT PERSON/TITLE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_

.....  
BOARD PRESIDENT: \_\_\_\_\_

RABBI: \_\_\_\_\_

EXECUTIVE DIRECTOR/CEO: \_\_\_\_\_

HEAD OF SCHOOL: \_\_\_\_\_

TREASURER/CFO: \_\_\_\_\_

DEVELOPMENT DIRECTOR: \_\_\_\_\_

NUMBER OF MEMBERS: \_\_\_\_\_

NUMBER OF DONORS (OUTSIDE OF PAYING DUES OR TUITION): \_\_\_\_\_

NUMBER OF CLIENTS: \_\_\_\_\_

NUMBER OF STUDENTS: \_\_\_\_\_

## *General Organization Information*

**1. Mission statement and organizational goals:** \_\_\_\_\_

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**2. Summary of organization's history:** \_\_\_\_\_

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**3. Summary of organization's demographics** (*e.g., age ranges, various constituencies, students, empty-nesters, families with young children*): \_\_\_\_\_

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## *Fundraising*

4. Describe your organization's current fundraising activities and goals including annual campaigns, capital campaigns, endowment campaigns and special events: \_\_\_\_\_

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A. What is your current annual fundraising goal? Please list the total dollar amount: \_\_\_\_\_

B. How much did you raise last year? Please address the following: the total dollar amount, number of donors, and the number and percentage of board members that contributed to your campaign: \_\_\_\_\_

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C. Please list and describe your organization's fundraising activities including special events, galas, mailings, face-to-face conversations, marketing efforts, etc.: \_\_\_\_\_

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D. Are you currently raising funds for another campaign? If so, please describe the campaign(s): \_\_\_\_\_

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5. At what donation level do you consider a donor to be a "major donor"? \_\_\_\_\_

A. According to your definition above, how many major donors does your organization have? \_\_\_\_\_

B. Do you have a donor recognition structure in place?  Yes  No

C. If so, please describe how you recognize major gifts: \_\_\_\_\_

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**6. Does your organization currently have an endowment? If so, please describe it in detail, including who manages the funds, what are its assets, how much it provides annually, and its spending policy.**

**A.** Does your organization currently have an endowment?  Yes  No

**B.** Does your organization currently have an endowment campaign? If so, who are the lay leaders and staff running the campaign? \_\_\_\_\_

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**C.** What is the current balance of your endowment? \_\_\_\_\_

**D.** How many individual donors have contributed to the endowment fund this year? \_\_\_\_\_

**E.** How were the endowment funds raised? For example: Special events, galas, mailings, face-to-face conversations, marketing efforts, etc. Please list and describe the activities: \_\_\_\_\_

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**F.** Do you have an endowment spending policy? If so, what is your organization's endowment spending policy?

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**G.** How are your endowment assets managed? \_\_\_\_\_

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**H.** Do you have an investment oversight committee?  Yes  No

Name of the committee chair: \_\_\_\_\_

Frequency of meetings: \_\_\_\_\_

**I.** Does your organization currently have a program to raise legacy gifts (e.g., bequests, gifts from life insurance plans or retirement accounts, etc.)? If so, please describe it in detail, including where legacy gifts are directed once realized (i.e., into the endowment or annual fund): \_\_\_\_\_

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**J.** Do you have a recognition program for bequests and endowment gifts? If so, please describe it in detail:

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**7.** Has your organization been promised bequests or other legacy gifts? If so, please list the dollars expected and the number of donors: \_\_\_\_\_

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**8.** Has your organization received bequests or other planned gifts in the last five years? If so, how many, what was the dollar value, and how were these gifts used? \_\_\_\_\_

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## *Recordkeeping*

9. Who is/will be responsible for the recordkeeping and administration of donor information, including bequests or endowment gifts? \_\_\_\_\_

\_\_\_\_\_

A. Do you have a system in place for documenting legacy gifts (e.g., copies of bequests, letters of intent, etc.)?

If so, please explain: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

B. Do you use donor software to track all contacts and all donations for your donors? If so, which program?

\_\_\_\_\_

C. Name and title of person responsible for recordkeeping: \_\_\_\_\_

\_\_\_\_\_

10. Which member of your legacy team will be responsible for submitting quarterly reports in the required format? \_\_\_\_\_

\_\_\_\_\_

## *Create a Jewish Legacy Program*

11. Please list the three to five staff and lay leaders who will make up your legacy team. List their titles, roles and contact information as well. *Applications will not be considered without this information and an affirmative response to question 12.* \_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12. Have the individuals listed agreed to their potential involvement in this program?  Yes  No

13. Are the members of your legacy team willing to:

A. Commit to a legacy gift within the next two years?  Yes  No

B. Make a presentation at a board meeting asking board members to commit to a legacy gift within the next two years?  Yes  No

C. Actively participate in legacy conversations with donors?  Yes  No

D. Keep the board apprised of Create a Jewish Legacy process and efforts to secure legacy commitments?  
 Yes  No

E. Commit to attending Create a Jewish Legacy training sessions?  Yes  No

F. Commit to preparing and implementing a Legacy Plan?  Yes  No

14. Has your organization's President/Board Chair, Rabbi, Executive Director/CEO, Head of School and Development Director (all that apply) been apprised of your application and potential involvement in this program?  Yes  No

15. Has your organization's Board been apprised of your application and potential involvement in this program?  Yes  No

16. Does your organization agree that all gifts secured through the program will be used to build an endowment fund?  Yes  No

17. Does your organization agree to write an endowment policy stating that all legacy gifts will be directed to the endowment?  Yes  No

18. Does your organization agree to use Create a Jewish Legacy marketing guidelines (see page 15) and a community-wide Declaration of Intent (see example, page 16)?  Yes  No

19. Please attach a list of your current board members.

20. Has your organization participated in the Harold Grinspoon Foundation's JCamp180 or Life & Legacy program?  Yes  No



## *Signatures*

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*PRINTED NAME OF INDIVIDUAL SUBMITTING APPLICATION*

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*DATE*

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*SIGNATURE*

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*PRINTED NAME OF PRESIDENT/BOARD CHAIR*

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*DATE*

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*SIGNATURE*

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*PRINTED NAME OF RABBI (IF APPLICABLE)*

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*DATE*

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*SIGNATURE*

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*PRINTED NAME OF EXECUTIVE DIRECTOR/CEO/HEAD OF SCHOOL*

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*DATE*

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*SIGNATURE*

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*PRINTED NAME OF DEVELOPMENT DIRECTOR*

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*DATE*

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*SIGNATURE*



The Jewish United Fund/Jewish Federation of Metropolitan Chicago (“JFMC”) appreciates your participation in the Create a Jewish Legacy (“CJL”) program. Upon signing the CJL application and signing the CJL partner agreement, you are required to follow the development and marketing guidelines below.

- **Mention CJL in your organization’s annual report.** We are flexible as to how you do that. Here are a few suggestions:
  - Include the CJL logo
  - Include a line that says, “[Organization] is proud to be part of JUF’s Create a Jewish Legacy program, designed to train and support Chicago’s Jewish day schools, agencies and synagogues in the area of legacy giving.”
  - Add an asterisk or another symbol next to CJL donors and indicate that they are donors through this program
- **Include the JFMC/Create a Jewish Legacy logo on any printed or electronic materials related to the program** (i.e., stewardship programs, legacy marketing materials, advertisements, legacy email blasts, etc.).
- **When referring to the program, refer to it as “Create a Jewish Legacy, a program of the Jewish United Fund of Metropolitan Chicago” or “JUF’s Create a Jewish Legacy program...”**
- **Include CJL program information on your legacy website.** For instance, include the following: “[Organization] is proud to be part of the Jewish United Fund’s Create a Jewish Legacy program, designed to train and support Chicago’s Jewish day schools, agencies and synagogues in the area of legacy giving.”
- If you are a JFMC affiliate, beneficiary and guarantee agency, you must also comply with all ongoing requirements written in the JFMC’s Resource Development Policy Guidelines.



# Declaration of Intent

It is my/our desire that the following community partner organization(s) benefit from my/our gift:

- Akiba-Schechter Jewish Day School*
- Arie Crown Hebrew Day School*
- Bernard Zell Anshe Emet Day School*
- Beth Emet The Free Synagogue*
- Congregation Beth Shalom*
- Congregation Etz Chaim of DuPage County*
- Ida Crown Jewish Academy*
- Jewish Community Centers of Chicago (JCC Chicago)*
- Jewish Women's Foundation of Metropolitan Chicago*
- Maot Chitim of Greater Chicago*
- SHALVA*
- Sinai Health System*
- Temple Beth-El*
- Temple Chai*
- Temple Sholom of Chicago*
- Jewish United Fund/Jewish Federation of Metropolitan Chicago*
- Other*

\_\_\_\_\_

Please return this Commitment form to the community partner organization named above, or mail to the **Jewish United Fund/ Jewish Federation of Metropolitan Chicago, 30 S. Wells St., Chicago, IL 60606**, to the attention of **Tamar Wolf**.

In keeping with Jewish tradition, I/we wish to share my/our blessing with others. Therefore, I/we make this Declaration of Intent to help provide for the Jewish community of tomorrow.

- I/we intend to Create a Jewish Legacy and will formalize my/or gift within \_\_\_ months.
- I/we have already done so but haven't shared the information with the benefiting Jewish Organizations.

My/Our legacy gift in the approximate amount of \$ \_\_\_\_\_ was completed through (check one):

- Bequest/Will
- Life Insurance
- Retirement Plan Assets (IRA)
- Charitable Remainder Trust
- Real Estate or Business Interest
- Charitable Gift Annuity
- Donor Advised Fund
- Other \_\_\_\_\_

\_\_\_\_\_  
DATE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
NAME(S) FOR FORMAL RECOGNITION

- I/we would like my/our gift to remain anonymous at this time.

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

\_\_\_\_\_  
HOME PHONE

\_\_\_\_\_  
CELL PHONE

\_\_\_\_\_  
EMAIL

- You have my/our permission to share my/our legacy commitment with the designated organizations.