

## **How Jewish Community Groups Are Collaborating on Planned-Gift Fundraising**

By Eden Stiffman

As a longtime board member of the Union for Reform Judaism, the national umbrella organization for Reform congregations, Don Leibowitz was familiar with the steep declines in synagogue membership in many places around the country.

At home in central New Jersey, he felt the weight of that trend in his role as a member of the Jewish Community Foundation of Greater Mercer's board and of Congregation Beth Chaim. Not enough new people were joining the synagogue to replace those who left, and a financial plan to ensure a strong future for local Jewish institutions was simply not in place. Maintaining old ways of doing things would not be sustainable in the long run.

"I could see that this was a real shortcoming with the organizations in our community that I had familiarity with," Mr. Leibowitz says. "There was really an absence of focus on how to take advantage of the wealth that was in the Jewish community and the interest in seeing continuity of the institutions and the programs."

His community and 42 others may have found a solution. The Harold Grinspoon Foundation runs a five-year-old program to help Jewish communities across the country promote planned giving among 465 organizations, including Jewish day schools, synagogues, and social-service charities.

Called Life & Legacy, the program includes coaching, training, and incentive grants to ensure that legacy giving becomes a normal part of Jewish philanthropic culture. It appears to be working.

### **Seeking Gifts Together**

Here's how it works: The Grinspoon fund partners with Jewish federations and community foundations in a city or region over a four-year period to help start a communitywide legacy-giving program. Participating organizations set a goal for the number of planned-gift commitments they'll strive to secure individually and collectively.

The foundation pays about a third of the program costs — a maximum of \$100,000 per community for each of the four years. The annual budget for most programs falls between \$200,000 and \$300,000; the federations and community foundations must come up with the rest. The Grinspoon grants pay for training sessions during the four-year effort, and organizations get incentive grants if they reach their minimum goal for securing planned-gift commitments.

During the first two years of the program, the target is 18, a spiritual number in Judaism. Each community also has a collective goal of 18 times the number of participating organizations — a locale with 10 groups in the program will aim to get 180 commitments.

The investment from participating federations and community foundations generally covers marketing, staff travel to attend conferences, a donor thank-you event, and the salary of a part-time employee, who coordinates the local organizations and serves as liaison to the Grinspoon fund.

Participating organizations also form teams of volunteers to assist the paid staff member, who is often a rabbi or executive director. The volunteer team writes a legacy plan that outlines how the groups will carry out the first few years of the program and which donors they'll approach first. The blueprint is subject to the Grinspoon foundation's approval.

To Mr. Leibowitz, who participates in the program as a fundraiser for Beth Chaim, it quickly became clear that the program had even more to offer. Not only do the community organizations go through training together, they meet informally to share advice and discuss challenges, hold joint donor thank-you events, and share lists of 20 key prospects, often longtime donors. In situations where a donor appears on at least three lists, the local federation may get involved to find out how the individual wants to be approached and avoid him or her being inundated by solicitations.

During meetings with donors and prospects, the groups are encouraged to promote each other's causes. For example, a fundraiser from one might have the conversation with prospective donors and say, "I hope you'll consider leaving a legacy gift to the other groups, too." To make it even easier, pledge forms contain a list of all participating groups, and on average donors select three organizations to receive a planned gift.

"It allows people to break out of what can be a narrow view focused on their own organization" that might preclude "seeing how it fits into the larger Jewish community," said Mr. Leibowitz.

This "community ask" approach is easier for donors and reduces competition among organizations that are often speaking to the same people, said Judi Corsaro, CEO of the Charleston Jewish Federation, which is helping 10 organizations participate. "The donor doesn't have to take 15 meetings from 15 organizations."

Winnie Sandler Grinspoon, president of the namesake foundation, describes the program as teaching communities to shift their mind-set. "Our hope is that, over the four years, the culture of philanthropy has changed — legacy giving is celebrated, and it becomes a normative activity," she said. "It's benefiting the community and not just a singular organization."

All together, participating organizations have received 15,721 planned-gift commitments with an estimated value of more than half a billion dollars since Life & Legacy launched five years ago. More than \$54 million in cash gifts has already been realized, most of it from individuals who, after a legacy-giving conversation, decided to give to a participating

organization's endowment instead of or in addition to making an after-lifetime commitment.

### **The Inspiration**

The idea for Life & Legacy came from a program run by the Jewish Community Foundation San Diego. Harold Grinspoon, a real-estate entrepreneur and the founder of the Grinspoon foundation, heard about the program's regional success and convinced the San Diego group's endowment director to help launch it nationally, starting in Western Massachusetts, where the Grinspoon fund is based.

"Many of us had planned giving on our to-do list but it never got to the top of the list," said Arlene Schiff, director of Life & Legacy and a former Jewish-federation executive. "When a \$5,000 or \$10,000 [grant] check is dangled in front of you, somehow you're more motivated to make time for this task."

It also motivates donors, she says, when organizations can say, "If you make this promise of a gift to the future, our organization will get \$5,000 today" thanks to the incentive dollars from the Grinspoon fund, which many organizations put into their endowments.

Those kinds of incentives may be the nudge communities need to take planned giving seriously, said Ms. Schiff. "We have this transfer of wealth, this window that we all need to take advantage of. It won't last forever."

Many organization leaders say the program has transformed fundraising in their communities and planted the seeds for long-term sustainability. "When we look back 20 years from now at what was the turning point, the defining moment that really made the difference," said Ms. Corsaro of the Charleston federation, "I really think this will be it."

See an [example](#) of a collaborative letter of intent.