

San Diego Provides Model for Creating Lasting Jewish Legacies

In the May 2012 issue of The Charlotte Jewish News we introduced you to the Foundation of the Jewish Community's Create Your Jewish Legacy program. Established by the Jewish Community Foundation of San Diego, the Create A Jewish Legacy model has been introduced successfully to Jewish communities throughout our country. We thank our colleagues in San Diego for allowing us to share this article with you to illustrate how their efforts have mobilized their own Jewish community and helped to create cultures of legacy giving from coast to coast.

By Gail G. Littman and Marjory Kaplan

As seniors gathered at a local Jewish organization to hear about leaving bequests for the community, one eager woman raised her

hand. "What took you so long?" she asked with a grin. "My alma mater has asked me for a bequest. My hospital has asked me for a bequest. And now, finally, you are here asking me for a bequest for my Jewish community. That's the most important bequest of all."

This scene could have taken place almost anywhere.

While the North American Jewish community can legitimately be proud of its record for current giving—annual, emergency and capital campaigns—planned giving efforts have been generally weak.

In most cases, community organizations are insufficiently focused or are not focused at all on planned giving and bequests, and certainly not on legacy gifts for Israel or national programs such as Birthright Israel. With the recession, fundraising staffs have

been reduced, so the prospects of even establishing planned giving resources are remote.

Mobilizing The Community

Recession or not, an enormous transfer of wealth is happening before our eyes. Through a Create A Jewish Legacy initiative, communities can embrace this unique opportunity to help people of all ages create legacies for the organizations that have shaped their lives. These future endowments can free organizations from relying solely on current fundraising efforts, the all-too-typical hand-to-mouth approach that threatens to topple organizations during tough times.

National data tells us that charitable bequests usually grow in a recession. However, a recent article in *The Chronicle of Philanthropy* stated, "For those who think the generational transfer will automatically flood their organizations with resources, it's time to think again. Without putting in the hard work of generating these planned gifts, 90 percent of donor mortality will simply result in lost current giving." (April 11, 2009)

The Jewish Community Foundation of San Diego is prepared to put in the hard work to

help others imagine what it would be like for Jewish organizations of the future to receive increasing endowment income to enrich their annual budgets

The San Diego Model

What has happened in San Diego over the past six years? In 2004, the Jewish Community Foundation implemented the Endowment Legacy Initiative (ELI) with twenty Jewish organizations, synagogues, and day schools. To date, almost 900 people have made arrangements for bequests and other planned gifts approximating \$200 million. In addition, \$31 million has been realized as a result of this initiative.

San Diego donors report that they are being thanked and appreciated more regularly and in more meaningful ways. There is an overall positive impact on annual and capital campaigns. In fact, research shows that legacy donors will give twice as much annually as those who do not have a legacy gift in their wills (E. Krauser, Bequest Giving Study for Campbell & Company, Center on Philanthropy at Indiana University, March 2007).

What's more, the culture around legacies has changed. "If you're Jewish and active in the



San Diego Jewish community then a legacy plan is the next natural and joyous step," says Jane Scher, founding ELI chair in San Diego.

The San Diego model shows that legacy building departs from traditional fundraising terminology. People aren't cards. No one needs to be rushed. The emphasis should be on conversations, not solicitations. These conversations are not with prospects but with loyal and trusted friends of our organizations. These friends need to be consistently and caringly connected to our organizations over time and over generations. ☆

Gail Littman directs the Create a Jewish Legacy program, the Endowment Leadership Institute (ELI) and the Governance Leadership Institute (GLI) at the Jewish Community Foundation of San Diego. Since 1994 Marjory Kaplan has served as chief professional of the Jewish Community Foundation of San Diego, where she holds the Miriam and Jerome Katzin Presidential Chair

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Members of Girl Scout Troop 1240 Support the Levine Children's Hospital

The members of Girl Scout Troop 1240, supported by the Levine JCC, donated her hair to Locks of Love, an organization that makes wigs for children who lose their hair due to medical complications. The troop also collected money to purchase new books for The Levine Children's Hospital ER Waiting Room.

Maeli Zhiss, age 6, donated 10" of hair and inspired other girls in her troop to continue growing their hair for donation in the fall. She is pictured supported by her grandmother, Geri Zhiss, who is also a cancer survivor.



Maeli Zhiss sacrifices her hair for a cause.

Aly Lerner offered her time and expertise to help inspire young

girls to consider hair donation as a way to help others even when you are little.

Aly, a former girl scout herself, is a licensed cosmetologist and a certified cranial prosthetic specialist. Her passion is to empower people. She choose to take her career to help women and girls that lose their hair due to medical treatments. The name of her company is Allurial. In the fall, Aly will be leading a support group for the American cancer society called "Look Good Feel Better" program as a volunteer. ☆

JCC Tributes

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