

Organized Jewish Community Convenes to Further New Movement in Jewish Philanthropy - “Create a Jewish Legacy”

Charities in the secular community have consistently looked to the Jewish community for inspiration and insight into how to successfully raise annual fundraising dollars. While the organized Jewish community has excelled in the annual campaign arena, it has not kept pace with universities, museums, performing arts organizations, hospitals, etc in the building of permanent endowments through lifetime or estate gifts. That is all changing.

Recognizing the danger of relying solely on annual giving for on-going operations and feeling the dramatic impact when their most generous donors die without a planned gift, a number of Jewish Community Foundations across the country have developed programs that systematically empower the local Jewish agencies they served to make planned giving a priority within their comprehensive fund development strategies to build their permanent endowments. These programs operate under the name “Create a Jewish Legacy.”

From May 3 through 5, 2011 100 volunteers and development professionals from Jewish Community Foundations and Jewish Federations from thirty-three communities across the United States and Canada convened in Kansas City to network and learn from one another about the different strategies for designing and implementing *Create A Jewish Legacy* programs. This 2nd North American Jewish Legacy Forum was planned collaboratively between the Jewish Community Foundations of Kansas City, Hartford, Connecticut and Springfield, Massachusetts; the Harold Grinspoon Foundation; and, Jewish Federations of North America. In addition, the Forum was partially underwritten by the Harry Portman Charitable Trust, UMB Bank, n.a., Corporate Trustee.

The Forum’s program featured professional fundraisers from both the Jewish and secular non-profit arenas The curriculum and key-note speakers included:

- [Rabbi Amy Walk Katz](#), Ph.D., of Temple Beth El in Springfield, MA - ***Music and Text: Discovering the Deeper Meaning of Legacy***
- [Jerry Silverman](#), President & CEO, Jewish Federations of North America – ***Dreaming the Possible Dream***
- [Janice Benjamin](#), Vice President of Fund Development, University of Kansas Hospital - ***Deepening and Sustaining Donor Relations***
- [Matthew J. Beem](#), MPA, CFRE, President & COO of Hartsook Companies, Inc./*Fundraising Counsel Worldwide* - ***Making Endowment Fundraising a Priority: A Smart Investment for the Future***
- [June Kim Penrod](#), Assistant Vice President, Crescendo Interactive, Inc. - ***New Trends in e-Marketing for Planned Gifts***

In addition to the formal programming much time was carved out for informal networking. Professionals and volunteers had time to learn first hand about one another's experiences, challenges and best practices.

Attendees returned home empowered with practical information and new ideas in best practices for implementing community-wide initiatives that educate volunteers and non – development professionals from Jewish agencies and synagogues in the art of cultivating planned gifts for the express purpose of building endowments.

Michael Dzik, Executive Director of the Jewish Federation of Greater Chattanooga found the conference incredibly valuable. “Now that I’m back home and have begun to digest all the information from the conference...I am even more appreciative of the wonderful speakers and lots of “tachlis” (nuts and bolts) my colleagues from the field provided. The Kansas City Jewish community and volunteers were so friendly and warm. I truly enjoyed my time and brought home some great information for my community.”

The Jewish Community Foundation of Greater Kansas City was selected to host the Forum because it was one of the first to launch a community-wide endowment building initiative in 2007. To date it has raised \$24 million in current and future permanent endowments. Underwritten by Stanley J. Bushman, the Bushman Community Endowment is a national model being emulated by Jewish communities across North America. Since 2003, more than two dozen other Jewish communities have turned their focus toward permanent endowments, establishing programs branded “Create a Jewish Legacy”. Collectively, these programs have raised an estimated \$400 million in legacy commitments.

For more information about the Jewish Community Foundation of Greater Kansas City, the Bushman Community Endowment initiative or the 2nd Jewish Legacy Forum, please contact Diane M. Azorsky, Assistant Executive Director at 913-327-8121 or dianeaz@jewishkc.org.