

Create a Jewish Legacy

HOW TO BEGIN

(Suggestions, not mandated, to be individualized for each community)

- **Endowment/Foundation Director and Federation CEO agree to promote CJL**
- **Obtain agreement from the Board/s to promote bequest awareness campaign and raise endowment dollars**
- **Appoint community CJL Chair**
- **Endowment/Foundation Director and Chair visit each organization in the community to introduce concept and elicit buy in**
- **Each institution passes board resolution to partner in CJL**
- **Create a CJL advisory committee from across the community comprised of CEO, Institution President and Endowment Chair from each participating organization. The purpose of the advisory committee is to provide oversight and set policy.**
- **Hold a formative meeting with all interested parties identifying next steps in the process, opportunities and responsibilities**
- **Establish a community wide Committee comprised of all the teams. This should include each institution's CJL Chair, Endowment Chair or President, Immediate Past Leader and another Past Leader with good institutional history, each already personally committed to testamentary or in vivo gift.**
- **Written plan – Each institution to craft their own CJL plan, then the overall plan for the community should incorporate all of the individual agency plans**
- **Marketing – concurrent activity**
 - **Press release to announce Chair**
 - **Edit and print brochure**
 - **Articles & ads for Fed News and bulletins of participating orgs**
 - **Mailers and handouts**
- **Provide ongoing training for the institutions and their participants – 4 to 6 times per year**
- **Donor Centric Conversations**
 - **Recruit CJL volunteers as door openers – 5 from each agency, they will receive training in addition to the CJL committee**
 - **Identify and qualify endowment prospects – to include potential donors from current and past leaders, major donors, and historic donors - and identify at least 2 workers for each**
 - **Each organization to create endowment options list**
- **Track Progress and Evaluate**