



*A quarterly newsletter for the Legacy Teams of Greater New Haven, featuring program news, important dates, and reports spotlighting your success!*

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## NEWS AND UPDATES

Happy New Year and WELCOME, all of you, to Create a Jewish Legacy Greater New Haven! You represent FOURTEEN Jewish synagogues and agencies in the Greater New Haven area. Together, we are a diverse, passionate, and strong cohort that is committed to the Jewish future of Greater New Haven. We are going to do important work together!

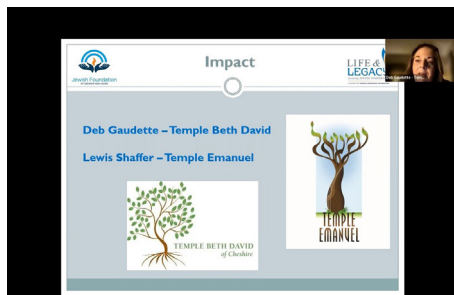


temple beth tikvah  
בית תקוה



## NEWS AND UPDATES (continued)

Our Zoom kickoff meeting and information session, held on November 16, 2022, was a great success. The event was attended by nearly 60 representatives from your organizations. Arlene D. Schiff, Senior Advisor of LIFE & LEGACY® at the Harold Grinspoon Foundation, provided an overview of the national LIFE & LEGACY initiative, including its background and success over the past decade. She also talked about why the right time is now to ask donors for legacy gifts as a way to build a strong, permanent endowment that will sustain each organization, and the Jewish community as a whole, far into the future. I hope you found her presentation enlightening and inspiring, and I hope she answered many of your initial questions about the program. Arlene is our dedicated community consultant. She is a key member of the Create a Jewish Legacy Greater New Haven team, whom you will get to know well through upcoming trainings and consultation meetings.



Speaking of upcoming trainings, you should have already received an invitation for our very first workshop, which is right around the corner! On **Thursday, January 12, at 7:00 pm on Zoom**, Arlene will present on "Writing Your Legacy Action Plan." See the box below for more information and the Zoom link. This will be our first opportunity to gather, albeit virtually, as a group of local Legacy Teams. All Legacy Team members are strongly encouraged to attend.

The Grinspoon Foundation is currently finalizing its 2023 schedule of national workshops. As soon as I have these dates, I will pass them on to all of you. These virtual trainings are not required. They are meant to serve as additional support for new Legacy Team members and as refreshers for seasoned Legacy Team members. This is also an opportunity for teams to connect with peers across North America. Grinspoon Foundation professionals will hold trainings on legacy 101, the legacy conversation, and stewardship (each will be offered several times over the year). There will also be webinars delivered by guest presenters, who will share the latest research and best practices in legacy giving.

Finally, please do not hesitate to reach out any time if you would like to meet in between required team consulting meetings with us. We are at the Teams' disposal and are happy to talk through any questions or concerns, especially as we get started. To schedule a meeting, call or email Tamara at (203) 387-2424, ext. 325, or [tschechter@jewishnewhaven.org](mailto:tschechter@jewishnewhaven.org).

Warmly,

*Tamara Schechter*  
Tamara Schechter  
Create a Jewish Legacy Manager

*Lisa Stanger*  
Lisa Stanger  
Executive Director

## UPCOMING WORKSHOP

### WRITING YOUR LEGACY ACTION PLAN

Thursday, January 12, 2023, at 7:00 pm EST on Zoom

A thoughtful, well-written Legacy Action Plan will ensure that each Legacy Team is working together toward a common goal with expectations and accountability clear from the start. Components include: a case statement, responsibilities of each member of the team, target prospects, marketing plan, stewardship plan, incentive grant goals, and an implementation strategy. Teams will leave with the tools to write their own Legacy Action Plans, which will be submitted to the Jewish Foundation of Greater New Haven and the Harold Grinspoon Foundation for review and editing. An individual follow-up meeting will be scheduled with each team to discuss the edited plans, after which the final Legacy Action Plan will be due for submission.

All Legacy Team members are strongly encouraged to attend. If you cannot attend, please call or email Tamara Schechter, Create a Jewish Legacy Manager, at (203) 387-2424, ext. 325, or [tschechter@jewishnewhaven.org](mailto:tschechter@jewishnewhaven.org), to let us know.

## DATES TO REMEMBER

FEBRUARY 13, 2023	Draft Legacy Action Plans due
FEB. 28–MAR. 2, 2023	Team consultation meetings to review Legacy Action Plans (virtual, each team will be hearing from us to schedule their individual team meeting)
MARCH 27, 2023	Final Legacy Action Plans due

## LEGACY SPOTLIGHT

*Sid and Donna Levine Fund in Memory of Morris Levine and Max Romanoff for the Benefit of the Jewish Historical Society  
Established at the Jewish Foundation*

Donna and Sid Levine recently established a new fund at the Jewish Foundation of Greater New Haven in honor and in memory of their fathers, Morris and Max. The Fund was established to support the important work of the Jewish Historical Society, including maintaining and expanding its extensive archives and providing community educational programs.



*Donna Levine's parents,  
Estelle and Max Romanoff*

"As a third-generation New Havener, I appreciate the Society's remarkable fifty-year history of documenting Jewish stories and lives. My father, Morris Levine, and Donna's father, Max Romanoff, were both World War Two Veterans who worked together at Chepovsky's Food Market on Legion Avenue. When Max was dating Estelle Gold, he took Morris to meet her. Estelle became Donna's mother. Both Morris and Max had a lot of affection for New Haven and its Jewish History. The Fund is named in honor of Morris and Max," said Sid Levine.