



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

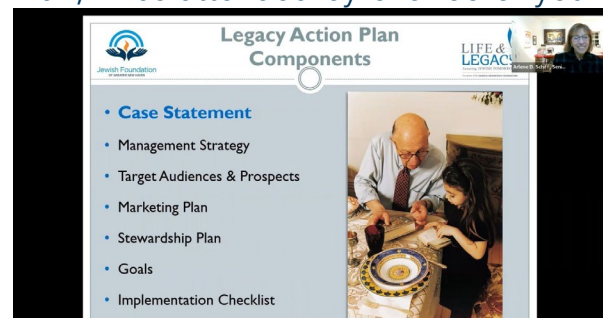
IN THIS ISSUE:

- News and Updates
- Upcoming Workshops
- Dates to Remember
- Legacy Spotlight: Congregation Beth El–Keser Israel

NEWS AND UPDATES

Dear Legacy Teams:

Chag Sameach, Happy Passover! We have had a busy first few months of Create a Jewish Legacy. Our January 12 workshop, “Writing Your Legacy Action Plan,” was attended by over 50 of you. Arlene D. Schiff, Senior Advisor of LIFE & LEGACY® at the Harold Grinspoon Foundation, led us all in a training on writing each organization’s Legacy Action Plan, a critical first step to establishing a successful legacy campaign that will be carried out over the next four years and beyond. The workshop concluded with a charge to each agency to draft its own Legacy Action Plan.



NEWS AND UPDATES *(continued)*

We want to thank all of you for the care you took when drafting such thoughtful and detailed plans. Your deep commitment to your organizations is so apparent! And thank you, also, for taking the time to meet with us at the end of February to review your plan drafts. The best part was being able to speak with each team at length and listening to all of you describe what makes your shul, school, camp, or agency so special and so vital to our community. The final plans will serve as a roadmap going forward for your fundraising, marketing, and stewardship efforts, so the work you put into them will most certainly pay off—in more ways than one!

Let's keep this momentum going with the next two workshops taking place this quarter: "The Legacy Conversation and Integrated Asks" on **April 25**, and "Marketing Your Legacy Program" on **June 6**. More information and Zoom links can be found in the next section of this newsletter. We hope to see all of you there.

The Grinspoon Foundation's annual LIFE & LEGACY Leadership Conference will take place May 7–9 in Springfield, Massachusetts, and the Jewish Foundation will be there! This year's conference celebrates 10 years of LIFE & LEGACY and includes sessions on adaptive leadership (with Hugh Dougherty from Harvard's Kennedy School), getting boards on board, best practices, finding new legacy donors, social media, working with volunteers, and having legacy conversations with younger donors. Legacy Team Members are very welcome to come for some or all of the conference; registration is free and we would be happy to pay for one night's accommodations at the Marriott Springfield Downtown. Please let us know if you are thinking about attending!

LIFE & LEGACY Leadership Conference

May 7–9, 2023 | Springfield, Mass.

For more information and to register, visit

<https://events.bizzabo.com/2023LegacyGathering/home>.

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. To schedule a meeting, call or email Tamara at (203) 387-2424, ext. 325, or tschechter@jewishnewhaven.org.

Warmly,



Tamara Schechter
Create a Jewish Legacy Manager



Lisa Stanger
Executive Director

UPCOMING WORKSHOPS

THE LEGACY CONVERSATION AND INTEGRATED ASKS

Tuesday, April 25, 2023, at 7:00 pm EDT on Zoom

Presented by Ron Krit, National Director, LIFE & LEGACY, the Harold Grinspoon Foundation

[Click Here to Join via Zoom](#)

This workshop focuses on the art of guiding a donor conversation to uncover the emotional connection that a legacy prospect has for one or more communal organizations and then asking the prospect to join in ensuring the future of the local Jewish community. This session includes role-plays so participants leave with the confidence they need to begin having conversations. Though securing a legacy commitment differs in many ways from transactional annual campaign conversations, many teams are in fact running multiple campaigns at once. Therefore, the workshop also covers how to integrate the ask for multiple purposes.

MARKETING YOUR LEGACY PROGRAM

Tuesday, June 6, 2023, at 7:00 pm EDT on Zoom

Presented by Arlene D. Schiff, Senior Advisor, LIFE & LEGACY, the Harold Grinspoon Foundation

[Click Here to Join via Zoom](#)

Marketing is a necessary component of any legacy program, both for generational awareness of an organization's legacy initiative and for securing legacy commitments. This workshop begins with each team examining how they already communicate with their donors and provides examples as to ways to integrate legacy marketing into existing marketing efforts. Harold Grinspoon Foundation marketing templates and marketing examples from other communities are shared. Additionally, information is provided as to how organizations can create their own legacy marketing that is effective and donor-centered.

All Legacy Team members are strongly encouraged to attend both workshops this quarter. Please RSVP to Tamara Schechter, Create a Jewish Legacy Manager, at (203) 387-2424, ext. 325, or tschechter@jewishnewhaven.org.

DATES TO REMEMBER

APRIL 15, 2023	First quarter report due to Tamara Schechter
APRIL 25, 2023	Year 1 Workshop: "The Legacy Conversation and Integrated Asks" (virtual)
MAY 7–9, 2023	LIFE & LEGACY Leadership Conference, Springfield, Mass. (in person, optional)
JUNE 6, 2023	Year 1 Workshop: "Marketing Your Legacy Program" (virtual)
JUNE 20, 2023	Grinspoon Foundation National Webinar: "Conversation with an Estate Planner" (optional)
JUNE 2023	Mid-year team meetings with the Jewish Foundation (virtual, to be scheduled individually)

LOOKING FOR IDEAS & TEMPLATES FOR MARKETING AND STEWARDSHIP?

The Grinspoon Foundation website has lots of resources available to use. See below or contact Tamara Schechter.

- 1 Visit www.jewishlifelegacy.com
- 2 Click the Resources Tab
- 3 Username: Resources
Password: hgfllegacy

LEGACY SPOTLIGHT

Mark and Cyd Oppenheimer Created a Jewish Legacy for Their Synagogue, Congregation Beth–El Keser Israel

"This is the only shul to which Cyd and I have ever belonged. We joined in time for the baby-naming of our eldest daughter over 16 years ago, and it has been our Jewish home—and,



really, a home in so many more ways—ever since. It gives us a great feeling of pride to leave something in our will for BEKI (it was also so much easier to do the paperwork than I thought), and I hope others will do it, too. I think it's especially meaningful for members in their 20s, 30s, and 40s, people who don't typically think of having an "estate," to do this. When we're gone, the shul will be here for our children."

—Mark Oppenheimer