

Inspire of Culture of Philanthropy



PRIZMAH CONFERENCE
Atlanta, Georgia **March 2019**

ABOUT CESJDS

- JK - 12 pluralistic Jewish Day School
- 950 students
- 250 faculty/staff
- Located in suburban Washington, DC
- Lower School and Upper School campuses
- Five person development staff (two are part time)
- \$1.72 million Annual Campaign
- \$33 million endowment

ABOUT Heather Jacobsohn



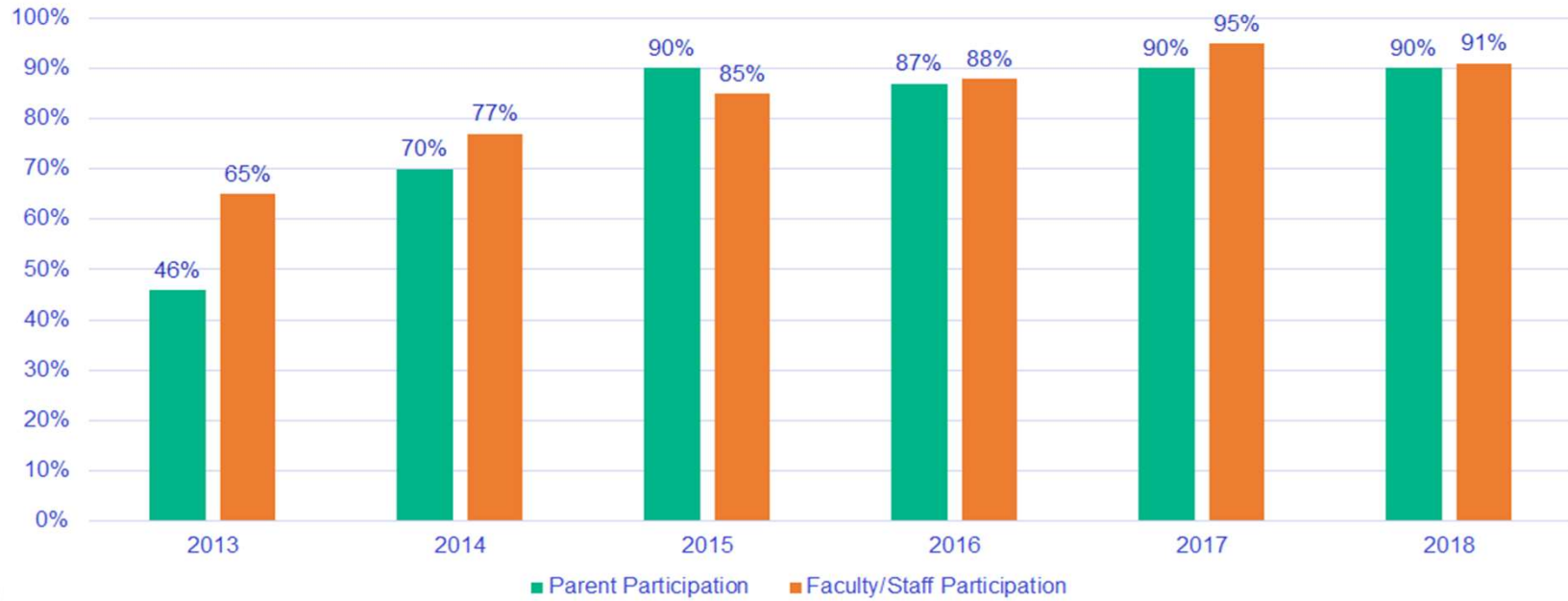
- Director of Annual Giving at CESJDS
- Previously worked for AIPAC and the Conference of Presidents of Major American Jewish Organizations
- Lived in Moscow for 2 ½ years and was fortunate to do tons of travel and volunteering
- Spend most of my non working hours wrangling my 3 and 5 year old, aspiring to exercise, and dreaming of eating at Instagram worthy restaurants

ABOUT Sharon Metro



- Director of Development at CESJDS
- Served as Director of Planned Giving for B'nai B'rith International for 16 years after practicing law and prior to joining the Jewish day school world of development
- Love my job mostly because of the fantastic humans with whom I work
- Happiest when I'm outside on a beautiful sunny day between 65 and 75 degrees

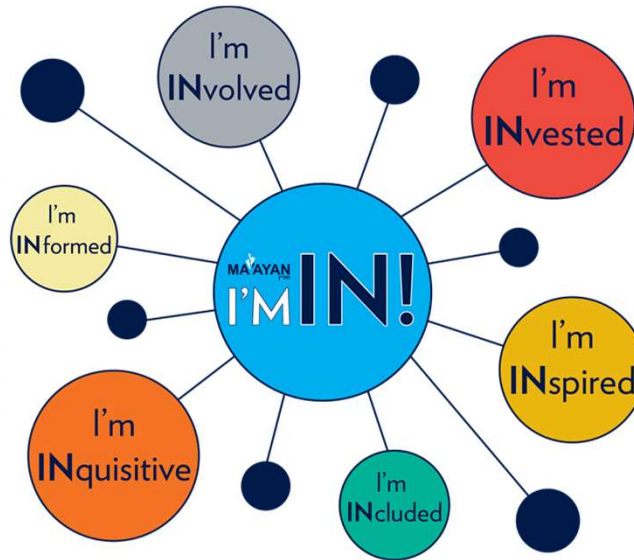
PARENT & FACULTY/STAFF PARTICIPATION



HOW DID WE GET THERE?

- Professional leadership in favor of promoting full participation
- Class captains
- Prominent messaging at in school events
- Emphasis on participation and gifts of any size
- Making giving “fun”
- Listing names of parents in weekly email and alumni in their monthly email
- Staff Dial-A-Thon last days of campaign
- Personalized emails to new families and those that haven’t made a gift in last years
- faculty/staff campaign launch - signed a banner, raffle for participation, Venmo





POWER of PARTICIPATION

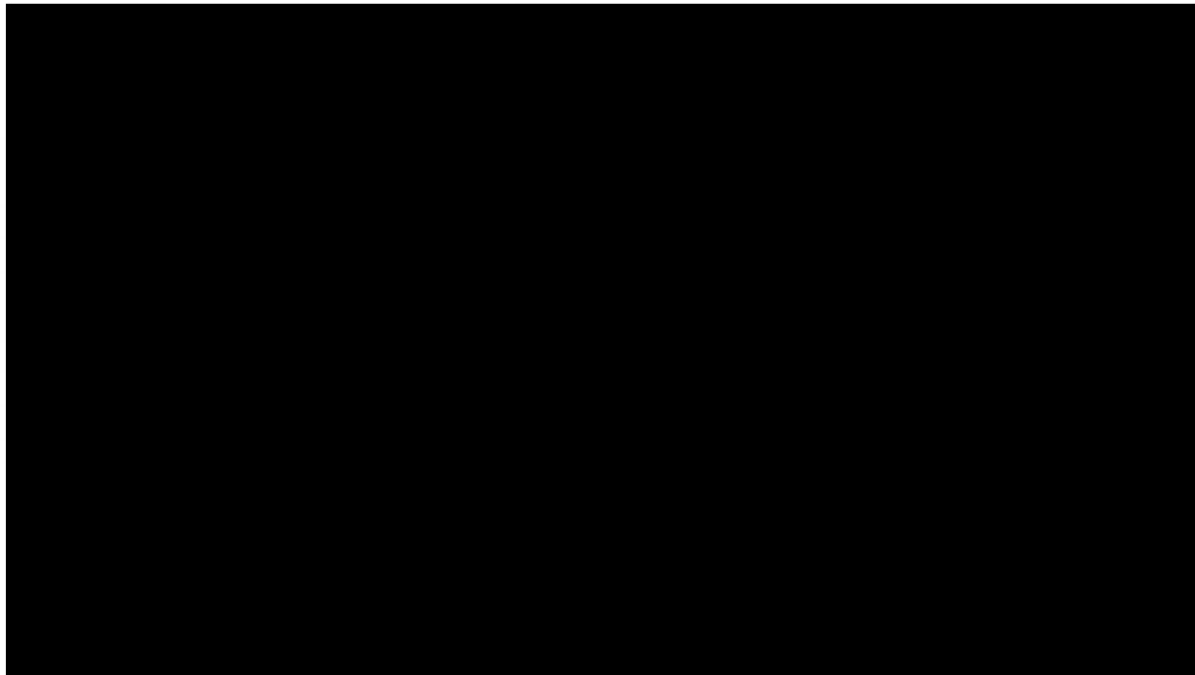


A Day in the Life of the CESJDS Lion



Charles E. Smith Jewish Day School

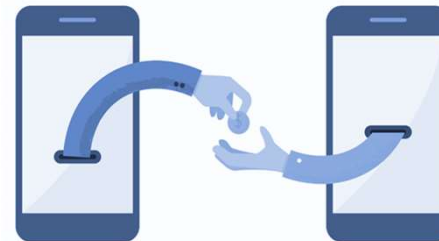
WWW.CESJDS.ORG



A Day in the Life of the CESJDS Lion

MATCHING GIFTS

- “Free” money
- HEP Data Software
- Email and communications regarding matching gifts



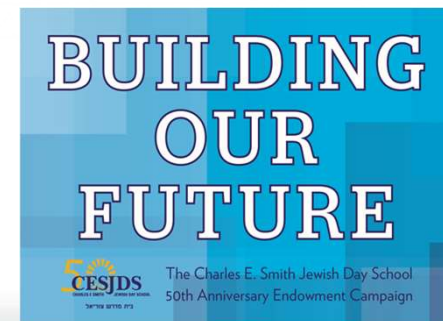
ALUMNI GIVING

- Focus on Participation
- Alumni Advisory Board
- Lion's Den



ENDOWMENT

- Building on a \$15 million existing endowment, we raised an additional \$18 million
- During the campaign we announced each new endowment gift with a community email
- Invite endowment donors to signature campaign events
- Recognition Society - Bonim Society



ENDOWMENT

- Naming opportunities
 - Nancy and Paul Hamburger Jewish Text Department Chair
 - CESJDS Fanaroff Family Hanukkah Musical
 - Silberg Family Yom Ha'atzmaut Celebration
- Double ask during the campaign year
- Ongoing stewardship of endowment donors
 - Use the names as much as possible
 - End of year letters with report and materials and photos
 - Bonim Society list on website and at events
 - Donor Wall
 - 100+ donor list



PLANNED GIVING

- Why planned giving?
- Planned Giving Education Series, link to website, legacy society
 - One off email
 - Included in grandparent and alumni newsletters
- Discuss at Board meetings
- Bonim Society recognition at one of the signature events
- Buckslip in each acknowledgement letter
- Challenge to get 25 gift commitments
- Planned giving part of strategic plan



FUNNEL OF LEADERSHIP

- Grade Captains
- Ma'ayan
- Development
- Board
- Alumni Board of Advisors
- Grandparent Leadership Team
- Planned Giving Committee
- Head of School Cabinet/Endowment Campaign Committee

