Fundraising for Youth Programs in Jewish Community Centers

May 1994

Dr. Marvin Ciporen
JCC Association of North America

Dr. Gary A. Tobin
Maurice and Marilyn Cohen Center for Modern Jewish Studies, Brandeis University

Joseph Harris, MSW
JCC Association of North America

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INTRODUCTION

Traditionally, Centers have derived almost all of their revenues from contributions by local Jewish Federations and United Ways, membership and program fees, government contracts, and donations from members of their Boards of Trustees. In recent years these income streams have not kept pace with the growing demands for services and scholarships, especially for youth programming.

Spurred on by the recommendations of the Century Two Committee (which conducted a two year study of the Center Movement), the JCC Association has created a standing Board Committee on Revenue Enhancement and has developed a major Youth Development Project in cooperation with the Maurice and Marilyn Cohen Center for Modern Jewish Studies at Brandeis University. Aided by a generous grant from the DeWitt Wallace-Reader’s Digest Fund, the Youth Development Project has been conducting training institutes and providing consultations for Center staff and lay leaders in an ongoing effort to strengthen Centers’ capacities to secure the funds needed to deal effectively with current and future challenges and opportunities.

This manual, along with a similar one on planning for youth programs and a series of reports of findings from the Youth Development Project, is designed to provide the Center Movement with a resource for continuing Board and Staff development. This volume is designed to be a “hands-on” guide to the underlying principles and techniques for securing funds needed to conduct, enhance and/or enlarge youth programs in JCCs of all sizes. Much of the material in this manual has been successfully utilized in training programs over the past year and a half and incorporates changes suggested by questions and feedback from participants in those institutes.

A fundamental premise of this manual is that fundraising is everyone’s business. Our research has repeatedly emphasized that the creation and implementation of a successful revenue enhancement program in a JCC requires an active partnership between members of the Board of Directors and all professional staff members. Therefore, this manual should be read and discussed by all key staff members and by the Board of Trustees. The JCC’s Revenue Enhancement Committee may decide to use sections of it for more detailed training programs.

Although this manual refers to situations and structures which are particular to Jewish Community Centers and YM-YWHAs, the principles and techniques it describes can be equally helpful to our colleagues in other youth serving institutions who share the Center Movement’s commitment to positive youth development.

We wish to thank all of the participants in our seminars and institutes and our colleagues at the JCC Association and Brandeis University whose insights and comments have strengthened this volume.

We want especially to note our deep appreciation to the Trustees and staff of the DeWitt-Wallace Reader’s Digest Fund whose generosity and encouragement have made the JCC Association’s Youth Development Project possible.

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1 We will use the terms “Board of Trustees” and “Board of Directors” interchangeably to signify the group of lay volunteers charged with the governance of JCCs and other nonprofit organizations. We will also call the individuals on these committees Trustees and Directors.
N OVERVIEW OF JEWISH PHILANTHROPY

A number of factors affect giving, including religious identity, volunteerism, and connections to Israel. Building Jewish identity and connections to Jewish organizations like the JCC increase the likelihood of giving and the amount given. Building stronger youth programs will require both strengthening the prospective donor’s ties to the JCC and demonstrating to him or her the role of the JCC in building Jewish community. The following data demonstrate the need for the JCC to be a major identity-building institution that can attract donors for youth programs.

The following findings are taken from a number of market research reports concerning Jewish fundraising. The most important findings are reported with implications for the Jewish Community Center.

A. Qualitative Data

- Most Jews believe that assimilation, loss of Jewish identity, and lack of Jewish education are the most important problems facing American Jewry today. Some believe assimilation to be a consequence primarily of a lack of Jewish education; some believe it results from the dissolution of generational ties to old-world Judaism; some believe the cause is intermarriage. But most people see assimilation as a major threat to contemporary American Jewry. JCCs, to a significant extent, can combat this process by fundraising for youth development programs which are a powerful means of nourishing and strengthening Jewish identity.

- A commitment to helping other Jews is the primary reason for contributing. A general desire to support the Jewish community, belief in Jewish continuity, wanting to help others, supporting the needy, and other general expressions of a desire to help those in need, were all discussed by the participants as key motivators for contributions to Jewish philanthropies. Giving, whether at a consistent or an increased level, is tied to the perception that something good is being accomplished through the contribution. While recognition, face-to-face solicitations, and other techniques may be utilized to build upon a general commitment or to help develop these feelings in individuals, they cannot substitute for the genuine reasons for which people give. Technique can not substitute for substance. Donors must be shown how they are helping others when they contribute to youth programs at the JCC.

- Some Jews indicated that they do not like personal solicitation under any circumstances. They said that they prefer to be solicited by telephone or through the mail. It is difficult to assess whether or not these feelings are a reaction to the solicitation process as these individuals experienced it in the past, or to other reasons. Many individuals may contribute to the JCC through direct marketing, through mail, or by telephone.

- The community’s capacity to give is very high. Current donors could increase their level of giving; a broadened donor base could be built. If properly motivated, many donors would contribute to youth development programs.
B. Quantitative Data

Income Affects Giving

Income appears to affect giving to Jewish philanthropies less in households whose yearly incomes are under $60,000 than in households whose yearly incomes are $60,000 and over. Between 41% and 47% of households with yearly incomes under $60,000 are charitable to Jewish philanthropies. The percentage rises to 56% for households with a yearly income of $60,000 to $125,000 and then jumps to 74% for households with a yearly income over $125,000. Another factor determining giving is a significantly higher percentage of households earning over $125,000 is the expectation in secular America that the very wealthy will take an active role in philanthropies.

Figure 1

Contributions to Jewish Philanthropies By Income

![Bar Chart]

Source: 1990 National Jewish Population Study
Volunteerism and Giving

The amount of time volunteered for non-Jewish causes seems to have little effect on giving to Jewish philanthropies. The rates of giving range from 51% with no volunteer time given to non-Jewish causes, to 47% with 5-9 hours to non-Jewish causes. However, volunteer time given to Jewish causes greatly affects giving to Jewish philanthropies. About 43% of those who do not volunteer time to Jewish causes give to Jewish philanthropies, while between 84% and 89% of those volunteering for Jewish causes give to Jewish philanthropies. The number of hours per month given by those who do volunteer to Jewish causes, on the other hand, does not seem significantly to affect the rate of giving to Jewish philanthropies. The data seem to indicate that involvement, regardless of the amount, in Jewish causes is fundamental to increased giving to Jewish philanthropies. Thus, motivating people to volunteer as coaches, committee members and scout group leaders, for example, can increase their propensity to donate to their Center.

Figure 3

The Effect of Volunteer Time to Jewish Causes on Giving to Jewish Charities

Source: 1990 National Jewish Population Study
RENDS AFFECTING JCCS AND THE NEED FOR A DIVERSIFIED FUNDRAISING PROGRAM

All fundraising decisions are made by people, including those made on behalf of government entities, companies and foundations. All donors are influenced by their view/perception of the people who will be handling their gifts and how, precisely, their gifts will be used to help others. Because most individual donors to JCCs are Jewish, it is especially important for centers to understand Jewish philanthropy.

For several years Jewish Community Centers have been in a paradoxical situation. Changes in family structures, multiple crises affecting the lives of young people, increased participation of women in the paid workforce, the influx of thousands of Jews from the former Soviet Union, and a heightened concern about Jewish identity and continuity have created a growing need for JCC services for youth. At the same time, Centers have had to cope with decreases in the percentage of their funds which they receive from central sources such as the United Way and Jewish Federations. There has been a continuous decline from 40.2% in 1960 to 36.21% in 1970 to 30.8% in 1980. The JCC Association’s 1992 Statistical Report: Budgetary Trends in Jewish Community Centers and YMs-YWHAs revealed that central sources provided 23.3% of Centers’ budgets in 1991, the lowest percentage in 30 years. This situation is not unique to JCCs. Jewish and non-Jewish not-for-profit agencies throughout the continent have been similarly caught in the cross-winds of increased demand for their services and decline in assistance from federated campaigns and government sources.

Meeting the Challenge

Compensating for reductions in traditional forms of support while meeting the community’s growing need for Center services requires a dual strategy of cost containment and revenue enhancement. Utilizing the latest and best business approaches in Center operations will help to ensure that JCCs are operated in the most economical and fiscally responsible manner possible. It will also make Centers more appealing to potential donors: no person (or institution) wants to see dollars wasted.

JCCs must also continually review program and other fees to ensure that they bring in an equitable level of revenue from those who can afford to pay for services and from participants who can receive reimbursements for Center programs. An appropriately structured fee schedule can both help to cover costs of vital programs and services which can not pay for themselves and contribute to Centers’ scholarship funds.

In addition, Centers must increase the amount of contributed income which they raise on their own by taking the following steps:

1. Establish JCC Finance and Revenue Enhancement Committees.

2. Build in realistic fundraising goals during the budget development process.

3. Develop an agency-wide fundraising plan.

4. Have the Revenue Enhancement Committee regularly evaluate the Center’s progress in each area.
THE ROLE OF STAFF IN FUNDRAISING

In describing the role of staff in fundraising we will distinguish between the primary roles of Executive Directors, Development Professionals, program staff, and Controllers in securing contributed income for youth programs. In JCCs which do not have a fundraising specialist on staff, responsibility for various fundraising tasks should be divided between the Executive and program staff. Centers may also choose to call upon the expertise of outside consultants for assistance with their fundraising activities.

Fundraising for Programs Starts with a Plan

Before a Center can seek funding to develop a new project or enhance an existing one, it must have not only a good plan for the program, but also data demonstrating the need for it. Formal needs assessment and evaluation are invaluable in providing documentation to support the credibility of fundraising proposals, and thus, of the Center itself. Data verifying the need for the proposed program can come from the following sources:

- research based on newspaper accounts, government and private agency studies, and census materials;
- focus groups conducted with current or potential users of Center services; and
- interviews with local planners, leaders of other agencies, rabbis and other clergy, politicians and their staffs, academicians and other experts.

In formulating a plan for a program, the Center must determine that the projected program will help to advance its mission. Further, it must develop a strong evaluation process according to which may be judged the extent to which goals are accomplished.

These information-gathering practices are necessary components in oral and written presentations to potential funders, who require careful documentation of requests.

Securing the necessary funds will require a team effort by the Executive Director, Development Professional, Program staff, and lay leaders.

The Role of the Executive Director

The Executive Director plays two crucial roles. First, s/he is the final word on whether a new program should be launched and existing programs enhanced. Second, s/he is actively involved in the fundraising efforts. The Executive determines the extent to which the Development Professional is involved in securing additional dollars for a project and/or in determining whether an outside consultant should be brought in to help. To secure funding the Executive Director

- works closely with the Development Committee to identify potential funders;
- has the primary responsibility for securing needed background information on potential individual donors prior to a solicitation visit, if there is no Development Professional on staff;
- frequently accompanies a lay leader on the actual solicitation and sometimes is the only person making the request; and
- is always present during face-to-face meetings with foundations, government agencies and corporate donors.

As discussed in section VII, either the Executive Director or the President of the JCC signs direct mail pieces and written correspondence with institutional funders.

3The Youth Development Project's forthcoming manual on strategic planning will provide detailed descriptions of the various elements and techniques involved in conducting a needs assessment and evaluation.
gestions to them about the type of people who might be of assistance.

- Work with the Development Professional to let donors hear from someone they helped. “Dear benefactor, your scholarship helped my son become proud of being Jewish and enabled him to make so many new friends in the three months since we came from the Ukraine.”—will certainly make a donor feel that what he or she did was wonderful.

- One of the most crucial things that a staff person can do to help in fundraising is consistently to provide the best programs and services possible. Donors have many options and will give their money where they feel important quality work is being done.

In addition to providing this kind of indirect support, program staff will occasionally be more directly involved in the fundraising process. Elected officials, foundation program officers and government agency personnel often want to speak to key staff members involved in the programs which they are considering funding. Prior to such meetings, the entire JCC team should, of course, exchange information and strategize about the meeting with the funder.

Moreover, program staff should take the lead in many small fundraising activities such as securing sponsorships for youth teams or working with parents to organize a bake sale. In Centers which do not have a Development Professional, more of the job of writing grants and identifying potential institutional funding sources will have to be assumed by senior program staff members.

**The Role of Controllers, Administrators and Business Managers**

JCC chief financial officers are in an excellent position to help identify potential institutional supporters. They should train the finance department staff to review how members, donors and Trustees make payments, e.g. does someone pay for benefit tickets with a family foundation check? In addition, and on a regular basis, they should review their own contacts in professional organizations: do they know key CFOs in foundations and/or businesses which make grants?

The preparation of a budget for a grant proposal should always involve the CFO. S/he can ensure that the budget accurately reflects all program expenses, such as the actual overhead costs and the value of the space used. Even if the grantor will not give the JCC all the funds necessary to cover those items, full and accurate budgeting will strengthen the Center's proposal by showing a greater contribution on its own part. The CFO also can help determine whether staff’s budget projections are realistic. Too low an estimate is almost as bad as one which is too high. A program is not credible if it does not have the financial resources to achieve its objectives.

When a program receives a grant, the CFO should establish separate ledgers or accounts for each funded project and then develop an itemized schedule of accounts so that project costs can be properly charged off to the right items in the approved budget. S/he should also prepare or oversee the development of all financial reports to funders to ensure accuracy and a professional presentation.
Board Members as Sources of Information for Fundraising

Successful fundraising requires timely and accurate information about potential donors. All Trustees should learn to keep their antennae out for potential prospects. Their knowledge about the interests, concerns and other charitable gifts of friends and business associates can help the JCC determine which programs and aspects of the Center would be most appealing to a potential donor. Information about donors’ capacities to give to a cause in which they are interested or about the amount of their previous gifts to other institutions can help ensure that they are asked to contribute on an appropriate level. Board members can help the Center identify decision-makers in foundations and corporations. They may also be in a good position to learn about changes in funding or business priorities which could be advantageous to the JCC.

Board Members as Door-Openers

There are many good causes vying for donors’ attention and dollars. Therefore, getting the attention of an individual donor or an institutional decision maker is frequently one of the most difficult parts of fundraising. Trustees are in an excellent position to help the Center present its case to people capable of making gifts.

Depending upon a Trustee’s relationship with the prospective donor, there are a number of ways in which s/he can help the Center make its request:

- Allowing the Center to use his/her name in a letter;
- Writing and signing a personal letter asking for support;
- Calling to set up an appointment for a team of solicitors;
- But, setting up and participating in a face-to-face meeting with a potential donor is by far the most effective way for a Trustee to assist a solicitation. Even if it is not the Trustee who asks for the gift, her/his presence at the solicitation meeting will add tremendous credibility to the JCC’s case and will make the Trustee’s acquaintance more inclined to give.

When a potential donor or decision maker is not personally known by anyone on the Board, a Trustee can be very helpful in developing a relationship between the prospect and the JCC. A Trustee can use her/his position as a community leader or else a connection s/he might have with the prospect through a professional or other charitable organization to extend an invitation to JCC events as the Trustee’s guest. These are opportunities, not necessarily to secure an immediate gift, but to educate people about the Center’s work. The long-term development of new supporters is an essential element of a successful fundraising plan.

Board Members as Solicitors

No one can be as effective a solicitor as a dedicated Trustee who has made a personal gift. A Board member who is actively involved in the Center is ideally positioned both to convey her/his enthusiasm and to exemplify personal commitment to the Center’s work when inviting a peer to contribute.

Yet, many Trustees are very reluctant to ask others to donate, often because of a fundamental misconception about fundraising. Reluctant solicitors fear that they will be pressuring someone to do something s/he does not want to do—to give away money. Fortunately, the truth is that almost every-
Individual Donations

As previously noted, gifts from individuals are by far the largest source of funds for charitable organizations. They are helpful for all types of youth programs at all stages and cost levels—depending, of course, on the donor’s resources.

In order to secure a gift from an individual you need to keep in mind a number of basic points:

- **People give to people**—so, who asks for a gift is very important.

- **People rarely give if they are not asked.** Almost everyone gives to charity. The question is whether and how much they will give to the JCC. If they are not asked by the Center, they will give their money elsewhere. When questioned about their charitable contributions, one of the major reasons cited by donors for giving a gift is that they were asked!

- **People like to give to make a difference.** Prospective donors need to know that their contributions will make a difference. They should be provided with opportunities to do good things, for example, to offer scholarship assistance to a needy child so that she can have the same wonderful experience their daughter had in your program.

- **Small contributions are very important.** First of all, they add up. Second, people who give a modest initial gift can be cultivated (if they have the ability) to give larger donations in the future.

- **Every gift should be acknowledged.** Make sure that your agency formally thanks all donors. No one wants to feel that her/his gift has been taken for granted.

This manual includes a brief overview of Planned Giving and its key vehicles, its vital importance to non-profit agencies and some basic procedures to follow in establishing and/or improving a Planned Giving program.
Direct Mail

Direct mail appeals by the Jewish Community Center can be effective ways of recruiting members or raising funds. Direct mail works best with multiple mailings throughout the year. Consistent themes and messages should be used to develop a general image of the Jewish Community Center which will help to recruit members and donors. A mix of simple letters combined with more interestingly designed packages should be utilized over time. It is important that the Jewish Community Center create direct mail campaigns that do not resemble the normal, so-called “junk mail” that comes from most Jewish organizations. These usually are pastel colored papers stapled into an ineffective direct mailer ad, or multiple pieces such as those included in bulk rate mailings with many documents. A direct mail campaign needs state of the art design and copy.

Direct mail solicitations are the most effective with younger individuals under the age of 40, and older individuals over the age of 65. Multiple mailings to the same household for the purpose of membership may produce surprising results. Direct mail solicitations for fundraising may be used for the annual campaign, special projects, or particular programs. It is sometimes necessary to construct different letters and return cards depending on the status of the donor, including how often they make donations and the amounts. For high end donors, personalized letters are necessary, with a specific amount requested.

Direct mail campaigns must be coordinated with other fundraising efforts within the community. It is especially important to coordinate such efforts with the United Way and the Federation’s other campaigns so that the mail solicitations do not cancel one another by being too close together.

Telemarketing

JCCs may also engage in annual or semi-annual telemarketing campaigns. Some individuals are more likely to respond to mail, and some are more likely to respond to telephone solicitations. There is some evidence that carefully coordinated direct mail and telemarketing campaigns are actually mutually reinforcing and increase the response rate for both. A script needs to be developed for telemarketing. Scripts should be short and make the case quickly and effectively, discussing organization, the special nature of the request, and special programs within the JCC to be funded.

Telemarketing campaigns may use either volunteers or professional telemarketing firms. If volunteers are used, they must be carefully trained. A poorly trained telemarketing volunteer can do more harm than good in terms of the overall image of the Jewish Community Center. A well-trained volunteer can raise additional funds, and also project an important positive image for the JCC.

Professional firms are sometimes more effective in soliciting both a higher total number of gifts and larger gift amounts. The cost of employing these firms is high compared to the cost-free use of volunteers. The availability of volunteers versus the cost of the telemarketing firms must be carefully weighed.

Telemarketing campaigns can be used to recruit new members (by promoting special rates), or to solicit memberships among former members. Different scripts must be devised, depending on the sub-market and considering age, marital status, and whether or not the individual has been a member of the Jewish Community Center in the past. Special membership categories can be developed for an amount that is lower than a full membership or a traditional membership. The special memberships can be an especially effective marketing tool.
What is Planned Giving?

Planned Giving, as its name implies, involves a thoughtful approach to making a contribution that is not based on an immediate impulse. Gifts are usually made from accumulated assets, not from current income.

In the past few years, Planned Giving has become a very hot topic and an increasingly popular method of fundraising. Changes in the tax laws have made it one of the few outstanding ways in which individuals can save on taxes as part of a financial plan.

Planned Giving has also gained in popularity because, unlike other forms of fundraising, it is donor centered. In Planned Giving a Center works to help individual donors meet fiscal objectives which may not be primarily philanthropic. The JCC does not merely solicit a donation to the Center. It brings vehicles which can help donors to enhance their current and future financial well-being. Consequently, Planned Giving provides an opportunity to reach donors who have not contributed, or typically have only made very small donations to the JCC, in addition to providing another vehicle for securing gifts from current or past supporters. As a donor-centered approach to fundraising, Planned Giving has the added appeal of being very flexible so that gifts can easily be tailored to accommodate a donor’s desire to aid more than one charitable institution at the same time.

Institutions increasingly rely on Planned Giving to provide long-term security. Thus, funds secured through planned gifts are usually placed in endowments or used for major capital projects. But a good Planned Giving program can also have important current benefits for the Center. Vehicles such as Charitable Lead Trusts and Deferred Gift Annuities can provide the JCC with current income. And funds in Trusts can be borrowed against (as long as the JCC can continue to provide the contracted annuity payments) to secure dollars for major capital projects.

Despite all of the financial benefits for the donor, a JCC must never lose sight of the importance of charitable intent. It remains a crucial part of the process of planned giving, both in the eyes of the tax codes and as a means of motivating people to make certain decisions which will benefit the JCC.

The Key Vehicles Used in Planned Giving for Youth Programs

Trusts

One of the most widely used Planned Giving vehicles is the trust. All trusts are arrangements whereby a person (called the donor) relinquishes legal control of some assets to another party (called the trustee). The donor must give up total control over the assets contributed to a trust in order to gain the tax benefits of this transaction. The Trustee is then responsible for managing those resources for the beneficiaries designated by the donor.

The Charitable Remainder Trust

A charitable remainder trust is a form of charitable trust in which the income of the trust is first paid to the donor and/or the donor’s beneficiary(ies) (such as a spouse and/or children) until either the death of the beneficiaries or a period of time up to 20 years. When the trust is terminated, the remaining assets are transferred to the charity.

A charitable remainder trust can enable the donor and her/his spouse to increase their lifetime income from less productive assets and gain significant tax advantages.

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4 A glossary of terms related to Planned Giving and a checklist of factors which might help identify good prospects for Planned Gifts are contained in the Appendix.
with an amount equal to the value of her stock she could use some of her tax refund for the purchase of life insurance, zero coupon bonds or other deferred instruments which would not be subject to estate taxes.

This choice would reduce some of the immediate personal financial benefit of setting up the trust for Mrs. Schwartz. However, creating the charitable remainder trust and purchasing insurance could be very beneficial for her heirs, who would be able to receive the full $60,000 value of Mrs. Schwartz's stocks without paying any taxes on that inheritance. Moreover, Mrs. Schwartz would not have to feel that she has to choose between her desire to increase her income and her wish to provide as much as possible for her family after she dies.

By setting up the charitable remainder trust which gave the principal to the JCC after the trust ends, Mrs. Schwartz also made a very meaningful and lasting gift to help her community. The JCC will permanently and prominently recognize this generous act.

To summarize, this is what a donor could accomplish through a charitable remainder trust:

- obtaining higher lifetime income from low yielding assets;
- receiving an income tax deduction;
- avoiding income taxes on capital gains;
- making a significant gift which would be permanently recognized to the JCC or to a specific youth program; and
- replacing the asset for her/his heirs in a way which is free of estate taxes.

One can get the most advantage from a charitable remainder trust by funding it with an asset that has appreciated in value such as stocks, real estate, jewelry, works of art and so on. It is particularly useful to contribute an appreciated asset which is yielding little or no current income. With certain assets, such as real estate, a donor may still be able to enjoy the use of the asset after establishing the trust.

The Charitable Lead Trust

A Charitable Lead Trust is a charitable trust in which income from the trust is paid to a charity for a stated period of time (determined by the donor) after which the assets of the trust revert back to the donor or her/his estate. This is an often neglected but wonderful device which is particularly attractive in times when the value of real estate is lower. It is most useful in estate planning and property transfers between generations.

A Charitable Lead Trust is an excellent way for donors to help a charity immediately and over a period of time, and get back all of their capital for themselves and/or their heirs. If the donor's heirs are the final beneficiaries of the charitable lead trust, this device can enable them to receive the assets from the trust at substantially reduced estate and gift tax cost, or perhaps free of estate and gift taxes. This benefit results because in computing the value of the gift to the beneficiaries, the value of the gift to charity for a period of years may be deducted.

Here is an example of how a charitable lead trust can help a family. Dr. Friedman has an excellent practice and numerous investments, including a property which is worth $1,200,000 and produces $100,000 in income every year. Dr. Friedman wants to make a very generous donation to the JCC. She is also concerned about minimizing the estate taxes her children might have to pay. Therefore, she decides to establish a charitable lead trust using the property mentioned above, providing that for ten years the JCC will receive the property's $100,000 income annually. At the end of that time the property will go back to her children. For estate and gift tax purposes
Even though the donors get their annuity payments in the future, the JCC will benefit immediately: the charitable gift portion of the contribution is given to the JCC as soon as the transaction is complete.

**Supporting Foundations**

Supporting foundations are established to provide funds for a designated not-for-profit agency or for one or more of its programs. They are afforded public charity status and tax benefits because of their affiliation with charities.

The JCC could enable families to establish supporting foundations at the Center to make periodic grants to the agency as a whole or for specific youth programs.

Like a private foundation, a supporting foundation exists forever. It can be named for anyone the donors designate. It has its own Board of trustees who make investment and grant decisions. The Board is comprised of people chosen by the donors and members representing the JCC.

Initial and future gifts to the supporting foundation are tax deductible. Income earned by the foundation is also exempt from taxes, enabling it to use all of its resources to help achieve the charitable objectives of the donors.

The JCC would have to decide the minimum gift needed to start a supporting foundation and would then administer the Foundation at no cost as a service to the family foundation.

A supporting foundation is an especially valuable approach for people who would like to remain personally involved with the use of a charitable gift. It is also an excellent way to involve future generations of the family in philanthropic support of the JCC’s activities.

**Gifts of Life Insurance**

As previously noted, life insurance can be used to help provide a donor’s heirs with funds to compensate for assets donated to the JCC through Planned Giving. Moreover, through a life insurance trust, the proceeds of a policy can be used by the JCC to create an annuity for someone the donor loves after s/he is gone. Such trusts can be particularly valuable for families with a seriously disabled child, for example.

Life insurance can also be used to directly benefit the JCC directly. One can donate an existing or a new life insurance policy (whole, universal or variable) with a cash value to the JCC by naming it the owner and beneficiary. The donor would get a current income tax deduction for the cash value of the policy. If there are still periodic payments to be made on the life insurance policy, the donor may decide to make an annual tax deductible contribution to the JCC of an amount equal to the insurance payments.

Life insurance policies offer an inexpensive way to make a much larger gift to support the work of the JCC while securing tax advantages for the donor.

Moreover, gifts of life insurance are an excellent way for people with modest resources to make a major contribution to the community. In addition, people with more insurance than they now need may wish to consider the advantages of donating the policy to the JCC.

A number of life insurance companies have begun offering special low rates for policies which will be given to a charity. The companies, by eliminating brokers’ fees and many overhead costs for these policies, make them even more affordable ways to contribute to the JCC. These policies are
How to Develop an Effective Planned Giving Program

1. Centers should begin a Planned Giving program with the right atmosphere. Trustees and the Executive Director should understand that a successful Planned Giving program requires time, patience, persistence, and a willingness to allow for some failures. Develop a realistic plan with identifiable goals and objectives as well as an adequate budget for the first year and for the initial three years of the program. In the earlier period, measure results more by the number of potential donors identified and contacts made than by the dollars raised by the program.

2. Put together the right committee; it should include:

- Significant donors who, if they have not made gifts, should be among the earliest targets for Planned Giving. Jewish tradition stresses leading by example.

- Financial people comprising a subcommittee on investments to ensure that the JCC is handling the funds entrusted to it prudently and securing benefits from vehicles like remainder trusts, from which funds are often not realized by the Center for many years after they have been donated.

- People with expertise who can provide advice on legal and financial matters related to Planned Giving vehicles and draw up the necessary documents. These are usually attorneys, CPAs, certified financial planners, and bankers. In addition, the Center may wish to develop an advisory committee exclusively made up of experts to help JCC professional(s) and the Planned Giving Committee with technical advice and assistance.

3. Identify the professional staff resources that the Planned Giving program will need and make certain that the proper staff time is allocated to the program. Initially, a Center can work with a part-time person or a consultant. Planned Giving can also be the responsibility of a Development Professional or Executive Director. But, if this job is assigned to an existing staff member, s/he must be provided with the necessary training, supports and time to devote to this project.

4. Develop policies for the Planned Giving program in response to these questions:

- What kinds of gifts will the Center accept?

- What methods will be used to determine if a contribution should be accepted (note, for example, the potential EPA problems involved with gifts of real estate)?

- Who will be authorized to negotiate the terms of an agreement with the donor?

- Which committee will approve the agreement or contract before it is signed?

- Who will be authorized to sign the agreement on behalf of the JCC?

- Who will serve as the Trustee for the gift — the JCC, Federation, a bank, or another financial entity?

- Which Planned Giving vehicles to be the focus of the Center’s solicitation effort?

- What minimum amounts and other limitations will be placed on gifts?
• Teach all Board members the basics of Planned Giving and the ways of identifying potential donors. The object here is not to make everyone an expert on Planned Giving: this is too technical a subject, and most gifts are best closed by professionals because the discussions often are quite personal. But all Trustees need to know that the JCC has ways to increase people’s current income, help them avoid capital gains taxes, reduce income and estate taxes, and make an important contribution to the Jewish and general Community. The Center can turn property that produces no current income into a source of financial support for the donor. It is even possible to make a significant planned gift to the JCC and provide an equal or greater sum of money to an heir.

8. Establish a marketing and cultivation plan. Identify a manageable number of people with a high potential of making planned gifts. Meet with them personally to discuss ways in which the JCC can help them achieve their financial and charitable goals. Develop a long-term relationship. One Trust often leads to another.

9. Have a meaningful and efficient system of recognizing gifts both as a way of thanking your donors and helping them achieve the immortality that is often part of their motivation. Recognition also has the advantage of demonstrating that Planned Giving has worked for yet another member of the community.
In this chapter we will describe institutional grants, explain how to identify funding sources and describe the basic elements of a grant proposal, record keeping and project management, as well as the role of the JCC Association as a resource.

**Grant Makers**

Although gifts from individuals are sometimes referred to as grants, we will confine our discussion in this section to grants from foundations, corporations and government.

**Foundations**

Basically there are five different kinds of foundations: (1) supporting (which were discussed in the chapter on Planned Giving), (2) family, (3) small foundations without their own full-time staffs, (4) community, and (5) larger staffed foundations.

Foundations differ in the amount of their assets, in the way in which they make funding decisions, in the type of grants they award (such as capital, operating, program, scholarships, matching), in the kinds of activities they support (youth programs, the arts, Jewish welfare funds, research) and the geographic focus of their grant making.

But all foundations develop guidelines to determine their grant-making strategies. Generally, larger and more professionally run foundations have more explicit funding priorities and more formalized application procedures than family foundations.

Foundation grants come in all sizes and shapes. They are usually easier to get for new programs and innovative ideas and are rarely renewed for more than three years. However, small family foundations operate almost like individuals and have greater flexibility and might fund a program or Center for longer periods of time.

Although securing foundation grants is a very competitive process, they are a unique and very valuable source of support.

Unlike any other potential funding source, giving away money is a foundation’s business. Foundations are required by law to give away at least 5% of their assets every year. This is a key point which distinguishes foundation grants, even from small private foundations, from all other kinds of fundraising; the money donated to the foundation is already earmarked for charitable purposes. The question is whether your Center or some other institution will obtain some of these funds.

In approaching foundations, a Center should understand what they will look for in making a grant decision:

- **People**—those who are involved in the project and those who will benefit from it.
- **Opportunities**—for the institutional donor to use its finite resources to have an impact, make a difference and do good.
- **Innovative, creative, meaningful projects which will enhance and/or increase services to a population in need.**
- **The credibility and capacity of an institution to do what it says it will accomplish.**
- **Groups or activities which the foundation is interested in supporting. Funders who are only interested in older adult programs will not (unless there are individuals on your Board who are very close to the decision makers who will ask them for assistance) fund your youth program no matter how wonderful, new, innovative, “sexy,” or important it is. So do your research before applying: “Know Thy Funder.”**

After we discuss seeking funds from corporations and government, we will describe how to identify and research potential institutional funders.
Securing Gifts from Institutions

Government Grants and Contracts

Securing government grants and contracts involves many of the same principles previously noted about securing awards from foundations and corporations. People will be making the funding decisions, and they will be more inclined to support the Center if it is better known to them and can make a strong case for its ability to provide quality services. Government grants vary in size and duration. They also can be very competitive.

Most government contracts and grants will be awarded as a result of a Request For Proposals (RFP) process. It is important for the Center’s name to be on as many mailing lists of relevant government agencies as possible so that it can be informed when various RFPs are issued. Local United Ways, Federations and local officials may publish “grants alerts” with information about upcoming or recently issued RFPs. “Bidders’” conferences are held for local and state prospective grant applicants which someone from the JCC should attend before application is made to the funding agency.

As is the case with requests to foundations and corporations, in applying for a government grant or a contract, it is necessary to make certain that the goals set forth in the proposal are attainable. Even if a Center is able to obtain a grant or contract by exaggerating the amount of service that it could really provide, it will not be refunded and the agency will gain a negative reputation.

When a JCC submits a proposal for a significant government grant or contract the Executive and/or lay leaders should keep its elected representatives apprised of the application. A letter of support from a city, state or federal elected official (depending on to what agency the Center is applying) can help make the difference if a proposal faces competition.

Significant amounts of money are regularly awarded through less competitive means such as discretionary allocations by local government officials, and through what is often referred to as “pork barrel” member bills, or special interest legislation. To secure funding from these sources a JCC should develop and maintain close relations with government officials and their staffs, as well as key people in various agencies.

If a Center receives government funding, it should invite elected officials and staff people from funding agencies to attend activities especially those which will afford an opportunity to make public acknowledgment of the elected official’s and/or agency’s support.

Identifying Institutional Funders

There are a great many directories of foundations and corporations which can help you learn which funders might be interested in supporting your project. The directories will reveal a potential funder’s priorities, restrictions, giving pattern, range of grants, preferred method of contact, review and award schedule, address, phone number, and Trustees. Funding directories are available through local Foundation Center Cooperating Collections and/or at area colleges. A Center can have customized computer searches done, and the JCC Association can help you with some of these. Having identified those organizations which might be receptive to JCC proposals, Centers should call or write for annual reports and giving guidelines.

Asking Board members, key donors and program participants for their employers and contacts is another important way of identifying potential funders. This procedure should be part of a Center’s annual survey of Trustees.

By reading reports and programs of similar agencies you can see what institutions have been supporting programs like those of the JCC. You
2. Supporting materials

- Funders require proof of the Center’s tax exempt status and will usually also ask for a copy of the last two year’s agency budgets and a copy of its most recent audit. They want to know that the Center is fiscally sound. Explain any major problems they may see (one year’s unusually large deficit caused by floods or hurricanes, or the extra scholarships the Center had to give out because of the recession, for example). Unless financial material is requested in the instructions, you can wait to send it until asked by an interested funder.

- Add some selective materials to bolster the case for the Center’s credibility, such as recent favorable articles in the press, letters of commendation, interesting pictures of program participants, results of a survey, evaluations of past programs, and letters of explicit commitment and support from any cooperating agencies noted in the proposal.

- Include a proposal. If the funder does not provide explicit instructions on what it wants included in a proposal, use the following outline as a guide to writing successful proposals.
but most should be. This section does not describe how the Center will go about doing what it wants to do; it notes what the Center wants to accomplish, especially in terms of how things will be better for people as a result of the proposed project.

C. Be realistic. The Center's ability to achieve these objectives will play a large part in how the funder will judge the JCC's success.

D. Include a time frame for the achievement of the project's objectives.

V. Methods or Program Activities

A. Describe what the proposed program will look like, how it will operate, the sequence of events, the duration of different activities, and who will run it. It is often helpful to include a time line to illustrate the schedule of activities.

B. Include some explanation of why the various activities were included in the program plan.

C. Discuss who will be served and how they will be selected/recruited.

D. Make certain that each of the project activities addresses at least one of the problems and objectives described earlier.

E. The methods should be within the scope of the agency and project's resources.

VI. Staffing can be a sub-section of the Program Description.

A. Identify all key project personnel, especially those who will be supported by the funder, noting their responsibilities, the amount of time which they will devote to the project, and their qualifications. Include a copy of each key person's most recent resume in an appendix.

B. Be certain to note any awards or distinctions which project personnel have achieved.

C. Indicate how the program staff will relate to the rest of the JCC.

VII. Evaluation — This section contains the Center's plan for determining whether, and to what extent, the project's objectives were met. It is also helpful to have a formative evaluation conducted while the project is going on, so that improvements and changes can be made as the Center learns from its work.

A. Describe the criteria for considering the program successful.

B. Describe the data the Center will collect.

C. Explain how the JCC will get the information needed for the evaluation.

D. Explain who will conduct the evaluation and what their qualifications are.

E. Explain how the results of your evaluation will be disseminated and to whom. The funder and the lay program committee should be receiving progress and final reports, as should the Board of Directors. If one of the project's objectives was to create a model program which can be reproduced elsewhere, then there should be a separate discussion of distribution in the description of the project activities. Indicate to the funder how the Center will use the JCC Association to help share the results of the project with other JCCs.
Proposal Style

While funders will try to evaluate the request on the basis of the need it will address, the capacity of the JCC to achieve the desired goals and the quality of the project personnel and approach, how you present your case also matters.

First of all, the package you submit should be neat and clean—not fancy. The proposal should be written in plain, easy to understand English. Don't use jargon and do not assume that everyone understands terms used in a particular profession or in the Center field. Use your spell checker! Carefully proof your work.

Your proposal should also be presented clearly:

* make it easy to read;
* double space;
* have lots of headings and breaks—don't overstuff the page.

A person will be reading your proposal and if s/he has to work too hard after reading 25 others, s/he will be less well disposed to your project than if it was easy to follow.

Also make certain that the proposal is thorough and consistent. All the problems stated should be addressed in the objectives and methods sections of the proposal and the budget should include resources to deal with them and so on.

Write in a positive, upbeat, active style. Convey your commitment and excitement about the project and your concern for the people you want to assist without sounding unprofessional or condescending. Don't "fix" youths; empower them, provide them with new opportunities and resources, and so on.

Be respectful and appreciative of the potential funder. But do not plead. At the same time as you are asking for financial support, you are providing the potential donor with an opportunity to participate in an exciting and important effort to make things better for the young people in your community.

Never imply that you are "owed" a grant—you are not. Recognize that there are other good groups out there who are also doing important work.

After the JCC Gets the Grant

First of all, say thank you to the funder!

The JCC should then publicize the award, giving credit to the funder and making certain that the funder is always properly acknowledged.

The key thing now is to do what you said you would do, and to do it well. Be certain that one person is supervising all the project activities and is responsible for complying with or coordinating all reporting requirements. The best way to get more grants is to implement your funded projects well.

Securing a grant should be the beginning of more sustained contact with the funder. Keep in touch with the funder and discuss any needed changes as soon as you know about them. Don't surprise your funder. They expect problems and unanticipated opportunities, but they hate surprises.

Be certain to maintain careful records of all project activities and expenditures. Have the finance department set up a separate accounting system or ledger for the project and have them create a "chart of accounts" so each item can be properly charged to the approved budget.

Finally, be sure to invite funders to see what their support is accomplishing—it is the best way to show your appreciation.
"As others planted before me, so do I plant for my children" - from the Talmud

A Promise for Tomorrow
Letter of Intent

In the tradition of our Jewish faith of sharing our blessings with others, I (We) want to aid future generations and ensure the continuity of services by UJA-Federation and its agencies.

Therefore,  □ I (We) have made provision
            □ I (We) will make provision

to support:  □ UJA-Federation (Unrestricted)
            □ UJA-Federation Domestic Affairs Division
            □ UJA-Federation Overseas Affairs Division
            □ and/or UJA-Federation member agencies

by:  □ making a bequest or endowment provision in my will
      □ naming UJA-Federation as a beneficiary of life insurance policies
      □ creating a charitable trust naming UJA-Federation as beneficiary
      □ establishing an Endowment or a Special Fund at UJA-Federation
      □ contributing to the UJA-Federation Pooled Income Fund
      □ purchasing a Charitable Gift Annuity

This letter of Intent represents my (our) commitment to the work of UJA-Federation and its agencies. It does not constitute a legal obligation and may be changed by me (us) at any time.

Name ____________________________ Name ____________________________
(please print) (please print)

Address __________________________ Address __________________________
__________________________________________________________

Signature __________________________ Signature __________________________

Date ________________________________

☐ You may mention and/or print my (our) name(s) where it may serve as an encouragement to others to make the same commitment.
DIRECTOR OF DEVELOPMENT

Job Description

Responsibilities include

- Planning and implementing strategies and programs for the acquisition of funds from individuals, corporations, foundations and government agencies, with emphasis placed on Planned Giving and endowment development,

- Coordinating fundraising events,

- Special emphasis is placed on planned giving and endowment development,

- Researching potential donors, establishing initial contact and closing major gifts in tandem with a volunteer or independently.

- Publicity and public relations relating to the department.

- Implementing a system for tracking the solicitation, billing and acknowledging of gifts.

- Serving as the staff person for the JCC Development Committee, responsible to the Executive Director of the JCC.

Skills Required

- Broad knowledge of fundraising

- Special expertise in planned giving and endowment development

- Strong communication skills

- Strong interpersonal skills and abilities

Academic Requirement

- Minimum bachelor's degree

- Post-graduate degree preferred

Experience

- A minimum of 2 years of successful full-time fundraising work experience

- Prior experience in planned giving and estate financial planning preferred
### Glossary of Terms (Continued)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIELD OF INTEREST FUND</td>
<td>Designates that a fund is to be used for a specified but broad purpose (such as, care of the aged or Jewish education), leaving discretion in the Endowment Committee to alter its use, if the need changes, within the purpose specified.</td>
</tr>
<tr>
<td>GRANTOR OR SETTLOR</td>
<td>A person who establishes a living trust.</td>
</tr>
<tr>
<td>GUARDIAN</td>
<td>A person named by the probate court to look after the care and custody of a minor child and the child’s property. A testator or testatrix can name a guardian of his or her minor children in his or her will if neither parent survives.</td>
</tr>
<tr>
<td>INheritance Tax</td>
<td>The tax imposed by the State government upon the beneficiaries’ right to inherit assets.</td>
</tr>
<tr>
<td>INTER-VIVOS</td>
<td>Between the living; from one living person to another. Where property is passed by conveyance, the transaction is said to be “inter-vivos” to distinguish it from gift made by bequest.</td>
</tr>
<tr>
<td>INTESTATE</td>
<td>Without making a will. A person is said to die intestate when he/she dies without making a will or dies without leaving instructions regarding the disposal of his/her property after death. The word is also often used to signify the person who died intestate; therefore it is common to say, “the intestate’s property.”</td>
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<tr>
<td>IRREVOCABLE TRUST</td>
<td>A trust which cannot be amended, modified or terminated.</td>
</tr>
<tr>
<td>INVESTMENT COMMITTEE</td>
<td>A committee of the Center or Federation which oversees the investment of all endowment funds. In most communities this is done by the Federation.</td>
</tr>
<tr>
<td>LEGACY</td>
<td>A bequest or gift of personal property by last will and testament.</td>
</tr>
<tr>
<td>LIFE INCOME PLAN</td>
<td>A planned life income gift is a transfer by an individual during his or her lifetime of securities, money or other property to a trustee with a provision that periodic payments be made to the individual, or some other beneficiary selected by him or her, for life. After payment to the beneficiary or beneficiaries ceases, the remainder goes to the agency.</td>
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<tr>
<td>Term</td>
<td>Definition</td>
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<tr>
<td>PROBATE ASSETS</td>
<td>Generally all assets of a decedent except life insurance not payable to the estate and property held jointly with right of survivorship.</td>
</tr>
<tr>
<td>PROBATE COURT</td>
<td>Court which oversees the administration of a decedent’s estate, including the probate assets.</td>
</tr>
<tr>
<td>RESIDUARY</td>
<td>The balance of a decedent’s estate subject to disposition under will after bequests.</td>
</tr>
<tr>
<td>RESTRICTED FUND</td>
<td>Designates that a fund is to be used for a specific purpose. It may also designate that only the income be used. Placing time limits on use of funds is essential.</td>
</tr>
<tr>
<td>REVOCABLE TRUST</td>
<td>A trust which can be amended, modified or terminated.</td>
</tr>
<tr>
<td>SUPPORT(ING) FOUNDATION</td>
<td>A separate charitable entity with its own officers and board of directors or trustees. Legally, a “supporting” financial arm of the agency, yet able to provide funds for varied charitable projects, programs and purposes. A way to maximize family involvement in the philanthropic process.</td>
</tr>
<tr>
<td>TAX &amp; LEGAL COMMITTEE</td>
<td>A committee of the agency’s Endowment program composed of attorneys, accountants and other financial professionals who are available as a resource.</td>
</tr>
<tr>
<td>TESTAMENTARY</td>
<td>Pertaining to a will or testament. Derived from, founded on or appointed by a testament or will. A paper, instrument, document, gift, or appointment is said to be “testamentary” when it is written or made so as not to take effect until after the death of the person making it.</td>
</tr>
<tr>
<td>TESTAMENTARY TRUST</td>
<td>A trust established under the will of an individual to take effect at his or her death.</td>
</tr>
<tr>
<td>TESTATOR</td>
<td>Person who makes a will (feminine: testatrix).</td>
</tr>
<tr>
<td>TRUST</td>
<td>Arrangements whereby a trustee holds and distributes property for the benefit of named or described individuals or charities according to the instructions of the grantor or testator.</td>
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APPENDIX

SOPHISTICATED CHARITABLE GIVING

Checklist of Planning Strategies

1. Charitable Remainder Trusts

   Keys to look for in prospective donor:
   a. Highly appreciated, low-yielding assets
   b. Need to increase lifetime income or provide for additional retirement income
   c. Desire to avoid capital gain on appreciation
   d. Estate tax exposure
   e. Philanthropic intent, especially to make a deferred gift while alive
   f. Interest in leaving assets to heirs at values greater than available if left in the estate
   g. Desire to invest trust assets to experience growth due to inflation and receive additional income as a consequence of the increase in trust asset value
   h. Intent to provide additional lifetime income to spouse or other loved ones

2. Charitable Gift Annuities

   Keys to look for:
   a. Desire for additional or alternative retirement planning where other plans are limited or not adequately available
   b. Philanthropic intent, especially when coupled with retirement income as a consequence of the gift
   c. Interest in some tax-free income as part of a retirement plan

3. Private Foundation Alternatives

   Keys to look for:
   a. Interest in the manner of involvement offered by a private foundation
   b. Desire to avoid private foundation restrictions on investment, holdings, disqualified parties, and distribution requirements
   c. Intent either to provide benefits for specific charities, through a supporting foundation or to have the privilege of recommending distributions to many qualified charities through an advised fund or a charitable common “E” fund
Board Member's Contact List.

All board members should complete the following questionnaire and update it annually. Completed questionnaires should be reviewed by the Center's Development Committee, Executive Director and Development Professional. Preferred mailing address should be marked with an asterisk.

Name ____________________________ Date of birth _____

Spouse's Name ____________________________ Date of birth _____

Children's Names and birth dates ____________________________

_________________________________  ___________________

Home Address ____________________________

Home Phone __________ Car Phone _______ Home Fax _______

Business Address ____________________________

Business Phone __________ Beeper #_________ Fax _______

Business has a matching gifts program. Yes____ No _____

Occupation ____________________________

Spouse's Occupation ____________________________

Schools Attended ____________________________

Synagogue ____________________________

Civic & Charitable Orgs. ____________________________

Contacts

Through Occupation

Accountant ____________________________

Attorney ____________________________

Banker ____________________________

Broker ____________________________

Ins. Agent ____________________________
# Appendix

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<thead>
<tr>
<th>Title &amp; Foundation</th>
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<td>Address &amp; Phone</td>
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**Household Tradespeople**

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<tr>
<th>Contractor</th>
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<tbody>
<tr>
<td>Decorator</td>
<td></td>
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<tr>
<td>Dry Cleaner</td>
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<tr>
<td>Electrician</td>
<td></td>
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<tr>
<td>Exterminator</td>
<td></td>
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<tr>
<td>Heating/Air</td>
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<tr>
<td>Plumber</td>
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<tr>
<td>Pool Service</td>
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<td>Others</td>
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**Personal Services**

<table>
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<tr>
<th>Accountant</th>
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<tr>
<td>Banker</td>
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<td>Dentist</td>
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<td>Doctor</td>
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<td>Grocer</td>
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<td>Hair stylist</td>
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<td>Health Club</td>
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<td>Jeweler</td>
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<td>Pharmacist</td>
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<td>Veterinarian</td>
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<td>Others</td>
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