Introduction

San Diego Jewish Academy (SDJA) is one of the country’s premier Jewish day schools, and the largest, most prestigious day school in the community. It challenges its students to achieve their full academic potential and become individuals of strong moral and ethical character, while inspiring them to make Judaism a vital and relevant aspect of their lives.

SDJA provides an education beyond academics. Every student is given the opportunity to participate and/or lead in Jewish campus life, sports, performing arts and school government. Low student/teacher ratios and individual attention from teachers maximize student success. SDJA educates the “whole child” by focusing on Jewish values. In doing so, the school builds future leaders who are respectful, thoughtful and caring.

SDJA began as a neighborhood school on the property of Congregation Tifereth Israel in San Carlos in 1979. As the Jewish population of San Diego and the enrollment began to increase and relocate further northwest, a second campus was added at Congregation Beth El in La Jolla in 1983. Long after outgrowing its rented facilities at Congregation Beth El, and spurred by major gifts from two families, SDJA’s Board of Trustees embarked on a capital campaign in 1998 to build a spectacular 40-acre campus in Carmel Valley, complete with five academic buildings, a learning center, and athletic fields. The new campus opened in September 2000, with capacity for over 1,000 students, a high school (grades 9-12), extracurricular sports teams, advanced placement courses, a performing arts program, and state-of-the-art science facilities. This year SDJA is proud to be celebrating its 25th Anniversary and looks to a future that is bright and financially secure.

Promise

Through your generous gift or bequest to the SDJA Legacy Campaign you ensure the future of San Diego Jewish Academy, an outstanding educational institution that benefits our children and the entire Jewish community of San Diego.
Purpose

Creating an Endowment or leaving a Bequest or Planned Gift to the SDJA ensures that the school will continue to:

- challenge students to achieve their highest academic potential and become individuals of strong moral and ethical character
- educate Jewish children, who help to carry the teachings and values of our Jewish heritage forward to a time we will not see.
- inspire children to make Judaism a vital and relevant aspect of their lives
- provide an education beyond academics, including intramural sports, fine arts and performing arts
- attract new Jewish families to the community who require a quality Jewish day school
- provide a center of Jewish learning where parents, grandparents, and the general community expand their Jewish knowledge
- ensure Jewish continuity through one of the most effective and proven means of instilling strong Jewish identity in young people

For information about creating or participating in an endowment fund or leaving a bequest or planned gift to the San Diego Jewish Academy, please contact Meg Goldstein at (858) 704-3706 or via e-mail mgoldstein@sdja.com.

Goals

Within the next 5 years, the Academy intends to have raised $10 million in endowment funds. Our Legacy Campaign was really launched by the generosity of the Chortek family’s million dollar Endowment. In addition to the Chortek gift we have endowment gifts from eight other donors representing $196,000.

To ensure our goals are met, the following schedule of activities will be undertaken on an ongoing basis:

- 1 school wide mailing to disseminate the JCF “Create a Jewish Legacy” brochure and/or raise awareness of our Legacy Campaign.
- 1 letter appeal in conjunction with Grandparents Day, with the aim to realize 12 bequests per year and prospects to attend parlor meetings or receive personal stewardship/solicitation
- 2 group presentations (excluding Board presentations) per year also with the aim of realizing 12 planned gifts/bequests per year (as stated above)
- 4 prospect personal/solicitation visits per month with the aim of realizing 10 outright endowment gifts per year
Over the course of three years, we hope to realize the following cumulative results:

Year 1: 10 Outright Endowments (currently at 9) 2 Bequests (realized)
Year 2: 20 Outright Endowments 14 Bequests
Year 3: 30 Outright Endowments 26 Bequests

Legacy Circle

The Legacy Circle represents those donors whose generosity and foresight will ensure that the San Diego Jewish Academy will always flourish and grow - teaching, nurturing and inspiring the next generation of Jewish leaders. The Legacy Circle recognizes those loyal and committed SDJA donors who create or participate in an outright endowment for the school or who designate a charitable gift through a bequest or planned gift to the school.

Targeted Donors

The Academy is blessed with both visionary and committed leadership and a base of loyal donors. The groups specifically targeted for inclusion in the Legacy Circle will be:

- Board of Directors
- Past Presidents
- Past Board Members
- Current Grandparents
- Past Parents
- Prior Donors to the SDJA Capital Campaign
- Staff

Distinct approaches will be employed to reach members of these groups. In the case of high potential outright endowments (those projected to realize gifts of $100,000 and above) a personal relationship and ask will be entered upon by the school’s most seasoned leadership and solicitors. A formalized process of Stewardship (see attached) for, past leaders, prior mega donors and prospective high potential donors has been adopted to support this effort.

In order to raise consciousness and acquire midrange outright endowment gifts or bequests a series of parlor meetings will occur during the spring. In the case of the broader base letter campaigns will be undertaken on an annual basis.

Marketing

- Video of the Case for Giving
- Brochure of the Case for Giving
- SDJA Website
- Link to the JCF Leave a Jewish Legacy Website
- Legacy Circle Annual Newsletter
• SDJA Newsletters
• SDJA Annual Report
• Letter Appeal
• ELI marketing materials

Recognition and Stewardship

• A thank you/welcome letter is mailed immediately upon a donor agreement to make an endowment gift or leave a bequest or planned gift to the SDJA.
• Names of all Legacy Circle Members (who have given permission) will be recorded on appropriate Endowment signage, per the Board adopted Endowment Policies and Procedures. Existing donors and all those who make gifts/bequests within the next 3 years (prior to August 31, 2007) will be considered Charter Members.
• An informational newsletter will be sent to all Legacy Circle donors, prospects and SDJA Board members. This annual newsletter will have timely planned giving information as well as a listing of all current members of the Society
• A recognition reception is planned for Spring 2005 to recognize all Founding and Charter Members of the Legacy Circle. Each year members will be honored at an appropriate event. In instances where a donor’s endowment creates sufficient annual revenue to be included in the recognition events honoring annual giving they will be included in these prestigious giving circles as well and awarded all attendant benefits.
• A Legacy Circle Commemorative Book/Board is being considered to record the personal stories, intent and testimonials of members. All members will be encouraged to sign the Book of Life at the Community Foundation.

Education

Over the course of the past 4 months, Howard and Marsha Berkson have convened a series of Financial Resource Development Task Force Meetings to build consensus around the school’s message to donors and its need for ongoing fundraising. Serving on the task force were the school’s philanthropic leaders, both from the Capital and Annual Campaign, representation from the Board, including the current, past and incoming Presidents, Parents and Alumni. Integrating a Legacy Campaign into our ongoing fundraising efforts was viewed as critical and will be widely supported by these key leaders. Additionally at its initial Board Retreat for the year the SDJA Board has adopted a set of policies and procedures that will guide and govern this endeavor. The Task Force understands the wonderful opportunity provided SDJA by its participation in the Endowment Leadership Institute and the community wide “Create a Jewish Legacy” initiative sponsored by the Jewish Community Foundation.
Management

All the elements of the Legacy Campaign will be managed and coordinated by Meg Goldstein, Director of Development, in conjunction with a Financial Resource Development Steering Committee currently comprised of:

Renee Sherman, SDJA President and Stewardship Committee Chair
Larry Acheatel, SDJA Executive Director
Deena Libman, SDJA Annual Campaign Coordinator
Janet Clancy, SDJA Marketing Director
Bev Pamensky, “Create a Jewish Legacy” Chair
Howard Berkson, Major Gifts Endowment Co-Chair
Marsha Berkson, Major Gifts Endowment Co-Chair
Carlos Michan – Latin Community Chair
Jeanne Zlotnick, Annual Campaign Co-Chair
Leo Spiegel, SDJA President Elect and Capital Campaign Chair

*Peter and Elaine Chortek have agreed to serve as Honorary Endowment Chairs.

All records and gifts will be entered into Raiser’s Edge and kept strictly confidential. High potential donor histories and interactions will also be tracked in Raiser’s Edge. Management and investment of Endowment Funds will be handled by the Jewish Community Foundation under the advisement of the SDJA Finance Committee.