

**GIFTS & ENDOWMENTS COMMITTEE
REPORT to the CONGREGATION**

JUNE 2009

The following tasks have been completed for the fiscal year 2008-2009:

1. Completed, with Board Approval, the "Gift Acceptance Policies"
2. Established a "Funds Acting as Endowment" fund
3. Implemented a "Purpose and Use Statement" for the endowment fund
4. Enhanced the Garden of Aliyah marketing program
5. Created a Garden of Aliyah tracking system
6. Developed a Planned Giving workshop
7. Developed a Planned Giving brochure
8. Researched and prepared a decision grid for Gift Annuity programs
9. Identified 2 donors that have included Temple Aliyah in their estate plans which represents a potential future donation of \$200,000 to the endowment fund
10. Developed and installed a link between Temple Aliyah's website and the Stelter website (a professional Planned Giving informational website which is customized to Temple Aliyah's requirements)
11. Prepared 12 written articles for Planned Giving marketing and education to be published in The Voice
12. Redefined, in concert with the Development Committee, the Development Director position and initiated a search based on the revised job requirements
13. Created a unifying concept for all major fund raising at Temple Aliyah under the umbrella of "Circle of Aliyah" and prepared an explanatory grid and brochure
14. Organized a "Community of Elders" group to solicit ideas and suggestions for marketing Planned Giving concepts

Suggested Areas of Concentration for 2009-2010:

1. Marketing and disseminating educational materials regarding the Circle of Aliyah and Planned Giving
2. Set specific monetary goals for the 2009-2010 Planned Giving initiative
3. Set a specific timeframe and procedures for attaining Planned Giving monetary goals
4. Increase Board awareness of "Circle of Aliyah" and various Planned Giving vehicles
5. Continue to improve the Temple Aliyah philanthropic infrastructure

Respectfully submitted,

Ron Fischer
VP Gifts & Endowments, 2008-2009