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*And now come, let us make a covenant together;  
And let it be for a witness between us*

(Organization Name) and the Dallas Jewish Community Foundation shall:

- treat each other and donors with the utmost respect.
- consider the well-being and interests of the donors first.
- be confidential and not participate in *Lashon Hara* (evil speech)
- be good listeners, responsive and inclusive.
- recognize the importance of *Ahavat Israel* (the love of the Jewish community) and strive for the betterment of the entire community.

(Organization Name) shall:

- engage the senior professional and a minimum of two key lay leaders
- attend all group and individual training sessions
- develop a plan including the establishment of goals, identification and cultivation of prospects, solicitations, recognition and stewardship.
- design a plan for sustaining a bequest program after the three year initiative
- share with the Dallas Jewish Community Foundation, the names of donors who have given permission to do so.
- bequests and endowment funds shall be held at the Dallas Jewish Community Foundation in restricted funds, custodial funds or other vehicles.
- adopt a Board of Directors Resolution to participate in the Create a Jewish Legacy Initiative.
- establish board-approved written endowment policies and procedures.

Dallas Jewish Community Foundation shall:

- develop the program and curriculum, secure funding and coordinate the ELI.
- offer high quality group and individual training seminars during the three year initiative.
- guide each organization in developing a plan, implementing action and tracking and reporting progress.
- provide consulting and coaching services including technical assistance in bequests, life income plans, life insurance and other planned giving vehicles.
- provide excellent marketing and advertising for the program including ads in the Jewish press, brochures, sample letters, etc. for donors and financial professionals.
- provide the Book of Generations Program.

\_\_\_\_\_  
Organization Officer

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DJCF Officer

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Rabbi/Executive Director

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DJCF Executive Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date