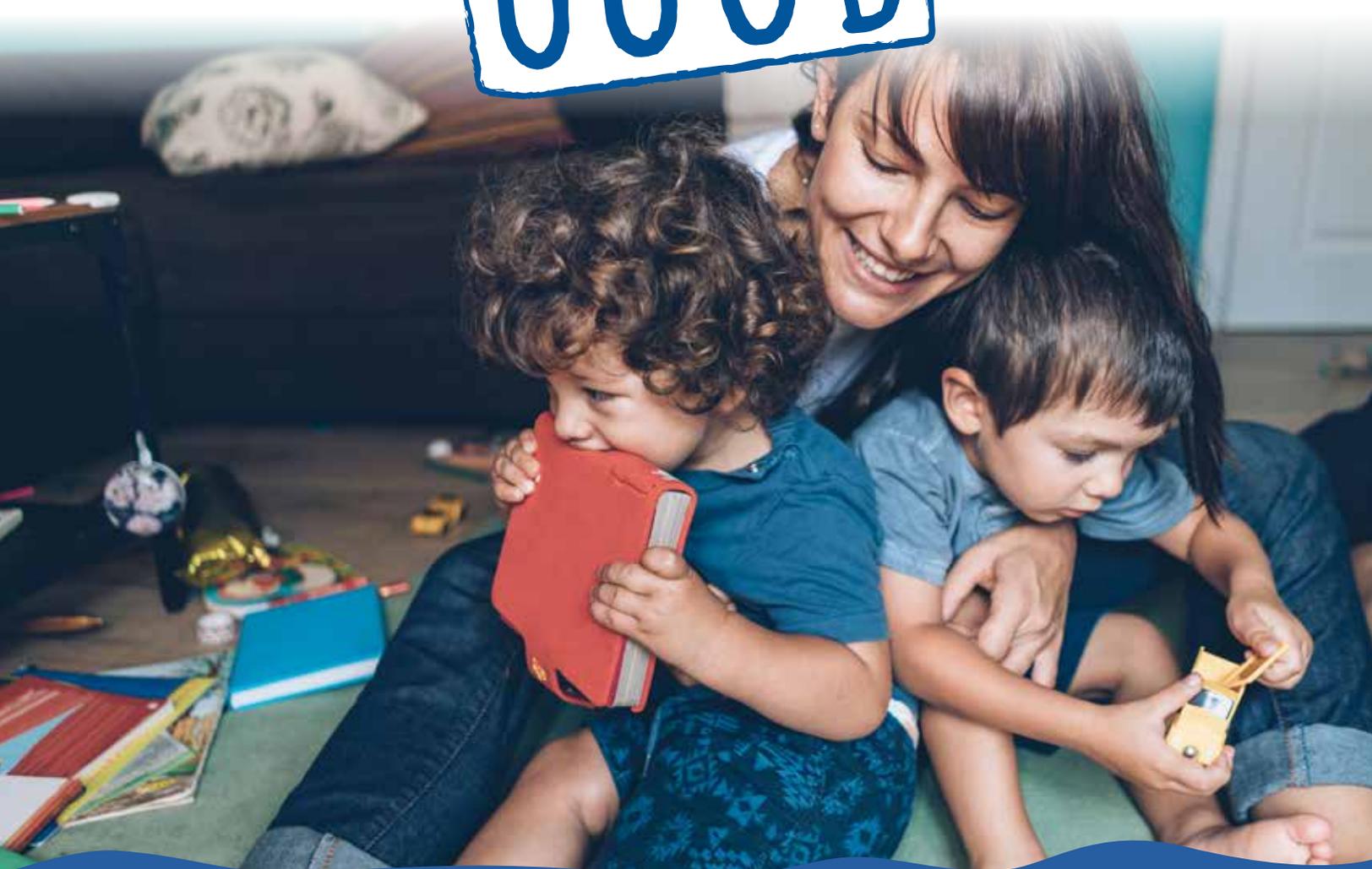


# 2022 Annual Campaign Canvasser Guide

The Jewish Federation of Ottawa is

*here for*  
**GOOD**



Building meaningful Jewish journeys where **no one is left behind.**

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# **The Jewish Federation of Ottawa is HERE FOR GOOD.**

## **Together we are securing our community's recovery and security.**

Last year, our community successfully navigated a crisis. The choices we made together are ensuring the vibrancy of our future and the success of the Jewish Superhighway.

To date, generous donations protected our community during the pandemic resulting in all our agencies being able to weather the storm. The situation remains uncertain and now is not the time to relent.

**Help fuel our recovery and help ensure that Jewish Ottawa remains a bustling, energetic hub of Jewish life where new programs and projects enable people of all ages to experience their own personal and meaningful Jewish journey.**

*"If a person convinces others to give,  
the reward is even greater than when  
simply giving by oneself."*

*Talmud, Baba Batra, 9A*

# Campaign 2022 top items to know

## **1. The Campaign: We are asking donors to increase their pledge to the 2022 Annual Campaign.**

The suggested increase is 15%. This is needed to help secure our recovery and to strengthen our community for the future. Federation has identified two main areas of priority: Supporting the most vulnerable; ensuring access to Jewish life and education. At the same time, Federation is focused on fighting the rise in antisemitism. Federation will continue to work with our advocacy partner, the Centre for Israel and Jewish Affairs, as we mobilize to counter antisemitism, particularly to ensure public school students and our university campuses have safe environments for our children.

Please check pledge cards carefully and thank those who made an extra donation this spring to the Emergency Campaign for Community Resilience. Tell them:

**“YOU CARRIED OUR COMMUNITY THROUGH THIS CRISIS. WILL YOU JOIN US IN LEADING OUR COMMUNITY TO A SECURE AND THRIVING FUTURE?”**

**2. Here for Good:** Federation’s powerful response to the COVID crisis is an example of the critical role it plays in the Jewish community. Federation launched an Emergency Campaign that raised an incredible **\$2.6M** to protect the community’s most essential services and most vulnerable members. It was this fast and fulsome action that helped all our organizations weather the storm. Explain to donors that when they give to Federation, they are ensuring the entire Jewish community is supported.

**3. Address the ongoing uncertainty of COVID-19 crisis:** Many people still need extra help. From food insecurity to mental health struggles, Federation is here to strengthen our Jewish social safety net. Many families remain financially fragile and at risk of disconnecting from Jewish life. Federation is working to ensure that everyone still has access to the Jewish Superhighway with the ability to enjoy meaningful Jewish journeys.

**4. Understand the Jewish Superhighway:** The vision has four primary outcomes:

- Inspired Jewish experiences for all ages
- Enriched Jewish education and learning
- Compassionate care for our most vulnerable
- A safe and secure community

**5. Face-to-face canvassing:** This remains the best way to ask for a gift and meeting outdoors is particularly effective to accommodate social distancing. This means that you should prioritize canvassing while the weather is still pleasant.

# Four Steps for a more successful canvass

Canvassing is about building relationships. The best relationships and connections are made in person. Here are some easy steps to bring meaning to your canvasses and help maximize results.

## 1. Show your appreciation

- A “thank you” is the best way to start a conversation.
- Be sincere and clear – thank them for meeting with you, thank them for their time and thank them for their gift.
- End with a “thank you” – every donor should feel our gratitude (regardless of the outcome)!

Remember, while it is hard to ask people for money, it is even harder to turn away those in need.

## 2. Find the donor’s passion

- Canvassing is about making a connection so that you build a personal relationship with each donor.
- Know how to share your story and passion – look for the right moments and opportunities, and remember it is ultimately about helping the donor find THEIR passion. Try and get the donor to share their story.

## 3. Know before you go

- Make your own gift first – lead by example.
- Do your homework: review the donor’s pledge card so you know their history. For example, did they donate to the Emergency Campaign for Community Resilience? Did they take advantage of the Challenge Fund in the last two years?
- Read over this guide, as well as the Case for Giving web page, and become familiar with the Jewish Superhighway.
- Ask an experienced canvasser, team captain or staff member for advice – they are here to help.
- Think through what an appropriate gift might be from the donor and listen carefully to how they are doing.

## 4. Learn to listen ... listen to learn

- The best canvassers do more listening and less talking.
- Listening lets you find out what the donor is passionate about.
- Use active listening — ask follow-up questions.
- Once you have made an ask, say nothing. Wait for the speaker to reply (even if there is an awkward pause).



# How to handle a donor's concerns

**Expressing a concern is a good thing. It means the donor is thinking about giving.**

Concerns are like questions and require logical, honest and compelling answers. Deliver appropriate information, and remember to never argue or suggest that the donor is wrong.

- Recognize the type of concern.
- Identify and address the actual concern. Consider using the feel, felt, found method:  
“I am sorry that you feel that way, at times I have also felt that ... and I have found ...”
- Remember that NO does not always mean NO – it can mean:  
“I do not KNOW...” or it can mean “yes at a future date”  
Now more than ever, a donor may simply need more time to get back on solid financial footing before being able to give. We can work with a “maybe later”.
- Remember that it is not personal.
- Use your listening skills: this can be a great indicator of what is really important to the donor.
- Allow the donor to talk, never cut them off.
- React positively: tackle the concern, not the prospective donor. Avoid argumentative language (for example the word “but”).
- Be honest. If you do not have an answer, say so and get back to the donor with the information as soon as possible (this is actually a great opportunity for another conversation!)
- After answering and discussing the concern, restate the suggested amount and wait, then allow the donor to speak.
- If you need support, do not hesitate to contact **Micah Garten** at 613-798-4696 x270 or [mgarten@jewishottawa.com](mailto:mgarten@jewishottawa.com), or **Yudit Simmons** at 613-798-4696 x296 or [ysimmons@jewishottawa.com](mailto:ysimmons@jewishottawa.com).
- Always make sure the conversation ends on a positive note (regardless of the outcome).

**Explain how every gift makes a positive impact, every gift helps.**

# Responding to **specific concerns**

## **What are Federation's fundraising expenses?**

"Federation's cost of fundraising is less than 12% of funds raised. We are proud that this percentage is among the lowest for any major non-profit organization in North America. We are able to do this through prudent management and an effective partnership between an efficient professional staff and hundreds of volunteers."

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## **I don't approve of the government of Israel and/or its policies.**

"We don't support any particular government or political party – we help the people of Israel. Funds go to support social services and humanitarian needs, particularly in the northern periphery of Israel. For example, your gift helps fund programs for youth-at-risk, expanding their educational and career opportunities, like STEM (Science, tech, engineering, arts and math) programs in elementary and junior high schools; therapy & emotional group services for young people; and programs for Bet Geshar, a recreation centre for young adults aged 18-30 with special needs. None of your charitable dollars go beyond the Green Line and none go to the Israeli government or the IDF."

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## **I am unhappy with what one of your funded agencies is doing.**

"The Federation funds major beneficiary agencies based on their adherence to our funding formula which mandates that programming serve the Jewish community. Reporting requirements ensure that the Grants and Evaluation Committee review the use and effectiveness of funding. While Federation will share our perspective with agencies, we must respect their independence."

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## **I am worried that Federation does not support all denominations of Judaism equally or leans in a particular political direction.**

"Federation's mission is to foster an inclusive environment that honours and supports diverse opinions and respectful discourse. We do not support any particular political leaning and our only concern is to help provide a productive environment that reflects the diversity within our community. We recognize that this is growing increasingly complicated and do our best to be supportive of all denominations."



*"The blessing of tzedakah is greater  
for the person who gives than for  
the person who receives."*

*Leviticus Rabbah 34:10*

## Responding to specific concerns continued

### **I cannot afford to give due to COVID-19 concerns.**

“If you cannot make the same gift, please do not feel that a smaller gift isn’t important. Every gift is valued. And remember, the pledge you make today isn’t due until December 31, 2022. You can pay your gift in full at that time, or you can pay installments throughout the year.”  
Don’t be afraid to ask if the donor needs help personally if they are struggling. If they do, immediately notify Federation staff and they will liaise with JFS.”

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**If it sounds like they are in significant need—i.e. have lost a job, are isolated and need help, have lost a loved one to COVID-19, etc.—then we should NOT proceed with a fundraising ask.** Simply listen and conclude with some of the following lines, based on context.

“I’m so sorry to hear about your situation. The needs have really grown since the pandemic began. It’s heartbreaking to see the impact on so many community members. Please know that we’re here for you—let us know if we can help in any way.”

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**If it appears, the donor requires assistance, the Jewish Federation of Ottawa has a network of support in place.**

“We really are here to help—would you like me to follow up with a member of JFO’s team to get in touch with you to see how they may be able to assist?”

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### **I gave twice last year. Why am I being asked again?**

“Firstly, thank you for your support. Your gift to the Emergency Campaign helped meet critical needs suddenly created by the COVID-19 crisis. However, the regular, annual and operational needs for agencies still need to be met. We are asking people to help fuel our community’s ongoing recovery. We know now is not the time to relent – we need to see our recovery through.”

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### **I want to give directly to a specific agency/I give to other causes.**

“A gift to a specific agency is an important investment. However, COVID-19 showed us the importance of community-led planning and coordination to ensure needs don’t go unmet. There is a wide spectrum of programs and services that can only be offered when we give collectively, and there are many organizations that would not survive without the support they receive from Federation’s Annual Campaign.”

(For more information, please visit [www.jewishottawa/giving/case-for-giving-2021](http://www.jewishottawa/giving/case-for-giving-2021))

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**Regardless of the outcome of the conversation, thank donors and then thank them again – they should feel appreciated!**

## There are several options for payment of a pledge:

### We can call you:

“I can have a member of Federation’s professional team call you to pay over the phone.”

### You can call us:

“A member of our professional team can process your payment by phone. You can call 613-798-4696 x 242.”

### Pay online:

“Visit our website here: <https://jewishottawa.com/annual-campaign-donate>”

### Pay by mail:

“Send a cheque to Jewish Federation of Ottawa at the following address:

Jewish Federation of Ottawa  
21 Nadolny Sachs Private  
Ottawa, Ontario K2A 1R9”

### Payment timing:

“Make your payment when it is convenient for you. You can make an immediate payment today, in the next month or so, or divide your gift into monthly payments.

While your full payment is not formally due until December 31, 2022 – kindly pay your gift in full as soon as possible. This allows Federation to plan, allocate and distribute funds more quickly.”

*Hillel used to say,  
“The more tzedakah,  
the more shalom.”  
Pirkay Avot 2:8*

**Thank donors  
and then  
thank them  
again!**

# Sample Call Script

Hello, may I speak to \_\_\_\_\_ please?

My name is \_\_\_\_\_ and I'm calling on behalf of the Jewish Federation's Annual Campaign. May I have a few moments of your time to talk about this year's Campaign?

**"No" - Is there a better time that someone could call?**

**"Yes" - Thank you very much. Your support makes a difference and is much appreciated.**

Our **2022 Annual Campaign** is focused on ensuring that our community emerges from the pandemic with a secure and thriving future. We're especially concerned because so many are still struggling, be it financial, mental health, or physical health challenges. If you or someone you know needs assistance, we are here to help.

So before I begin: How are you today? Have you done anything special this past summer or year? (or ask any other open-ended question to invite some warm conversation.)

Last year, our focus was on resilience and getting the community through the darkest periods of this crisis. Federation is working now to build our community's recovery. 2021 will be a make-or-break year for so many in our community—and why your philanthropic leadership is so critical right now.

That's why we're asking: Will you join us in leading our community's recovery? Can we count on your gift to our **2022 Annual Campaign**?

**(If they can donate)** Thank you so much. Last year you made a gift of \$XX dollars—would you be able to increase your gift by 15% this year to \$XX? [Please consult your donor card to determine what increase in gift you should ask from the donor]

**(If they cannot increase by XX%)** Not a problem. Would you be able to renew your gift from last year at the same level? Thank you! We are so grateful that you are investing in our community's recovery.

This pledge is due by December 31, 2022. However, we encourage you to consider monthly payments on your credit card. Payments can be made by credit card, cheque (payable to the Jewish Federation of Ottawa) or online at [jewishottawa.com/annual-campaign-donate](http://jewishottawa.com/annual-campaign-donate). How would you like to pay?

Can I take a moment to confirm your address? Your e-mail address? Your cell phone number?

On behalf of the community, thank you for your support of the Federation and our community.

Have a good day/afternoon/evening!

## OPTIONAL SCRIPT

• If it sounds like they are in significant need—i.e. have lost a job, are isolated and need help, have lost a loved one to COVID-19, etc.—then we should NOT proceed with a fundraising ask. Simply listen and conclude with some of the following lines that make sense, based on context.

I'm so sorry to hear about your situation. The needs have really grown since the pandemic began. It's heartbreaking to see the impact on so many community members. Thank you so much for taking the time. Please know that we're here for you—let us know if we can help in any way.

• If it appears the donor requires assistance from the community...

Jewish Federation of Ottawa has a network of support to assist those who could use some assistance. We really are here to help—would you like me to follow up with a Federation team member to get in touch with you to see how they may be able to assist?

B) For those not in need (i.e. "I'm doing okay."): I want to talk to you today about how Federation is working towards building our community's recovery and security. The crisis is continuing. In many ways, it has gotten worse than when the pandemic started. (Pick and choose from the options below)

- Growing mental health challenges—many who never previously struggled now need help and don't know where to turn.
- A lot of community members who lost work are still looking for new jobs.
- Many small business owners—especially small family businesses like restaurants—have been devastated and will never be the same.
- For many, pre-existing addictions have been enflamed by isolation and other personal crises.
- The stress and pressure has led to many family breakdowns.
- Many Jewish families are struggling to afford essential Jewish programming for their kids.

# Canvasser Check List

Use this checklist during a canvass to make sure you go through the most critical stages in the process. Keep this handy during your conversations with donors.

- Know your donor by reviewing their past giving and speaking to your Campaign team leader if you have any questions.
- Try to schedule a face-to-face conversation outdoors, (Zoom or FaceTime instead of a phone call) and, where possible, invite a Federation professional to join.
- Talk about this year's Case for Giving. Use active listening and engage in a conversation with the donor based on their questions, thoughts, and feedback.
- Ask if they are open to a discussion with a Foundation team member.
- Make the ask! Aim for the highest amount you think this donor could give, if inspired.
- Refer to your pledge card for a recommended amount to ask for.
- Confirm the pledge.
- Thank the donor for their generous gift.
- Ask the donor for their preferred payment method.
- Thank the donor again before concluding the canvass.

*"How wonderful it is that no one need wait a single moment to start to improve the world."  
Anne Frank*

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**Partnership highlight:** Last year, the Foundation launched the Harold Grinspoon Foundation's **LIFE & LEGACY** initiative. LIFE & LEGACY is a program that unites local Jewish organizations to work together to secure legacy gifts in support of Jewish Ottawa. So far, community members have signed 282 Letters of Intent, which means that **\$11M** has been committed to the Community on legacy pledges.



# Annual Campaign 2022 - Donor Feedback Form



Thank you so much for canvassing. Your role is so important—it makes Federation’s work possible. Please share what you’ve learned!

Canvass Date: \_\_\_\_\_

1) Your Name: \_\_\_\_\_

2) Federation Professional Contact: \_\_\_\_\_

3) Donor Name: \_\_\_\_\_

4) Was the donor able to make a gift to the Annual Campaign this year?  yes  no (if answer is no, skip to #9)

Comments: \_\_\_\_\_

\_\_\_\_\_

5. This year’s Annual Campaign focuses on two key priorities for community recovery. Which resonated with the donor most?

Supporting the most vulnerable  Safeguarding access to Jewish life and education  Other : \_\_\_\_\_

\_\_\_\_\_

6. Did the donor have any questions about Federation or this year’s Annual Campaign?  yes  no

Comments: \_\_\_\_\_

\_\_\_\_\_

7. Did the donor have anything positive or negative to say about Federation’s work? Please specify:

Comments: \_\_\_\_\_

\_\_\_\_\_

8. What is the donor’s 2022 Campaign gift? \_\_\_\_\_

9. Any additional notes or comments you’d like to share about this donor? Is there any follow-up needed?

\_\_\_\_\_

Thank you for canvassing and completing this form. If you’d like to discuss any of these points further with your Federation professional, don’t hesitate to connect with them directly.

## WHERE THE FUNDING GOES

A GIFT TO THE ANNUAL CAMPAIGN PROVIDES:

**Inspired Jewish experiences for all ages:** With special programs like Microgrants and Jewish jumpstart; funding for agencies like: AJA 50+, Chabad Student Network, Hillel Ottawa, Jewish Youth Library Preschool, JET classes, Limmud Ottawa, NCSY Lunch Clubs, Or Haneshamah Machaneh Shabbat, Ottawa Torah Centre classes and workshops, Sephardi Association, and the Soloway JCC.

**Enriched Jewish education and learning:** Through our day schools: Torah Day, and the Ottawa Jewish Community School, and the Ottawa Torah Institute/Machon Sarah; and our supplementary Schools: Chabad Hebrew School, Ottawa Modern Jewish School, Ottawa Talmud Torah, Temple Israel Religious School, and Torah High.

**Compassionate care for our most vulnerable:** Through our social service agencies: Hillel Lodge, Jewish Family Services, Tamir, and programs like AJA 50+ Creative Connections, Camp B'nai Brith's scholarships for campers, and JYL's Friendship Circle.

## The differences between the Jewish Federation of Ottawa and the Ottawa Jewish Community Foundation

### The Federation:

- raises funds annually for the community's immediate needs
- distributes funding through an allocations process conducted by the Grants and Evaluations Committee
- plans for the evolving needs of the community
- coordinates community action and represents the views of the community

### The Foundation:

- holds and manages endowed funds
- makes perpetual disbursements to beneficiary agencies of the donor's choice
- assists donors with fulfilling their long-term philanthropic giving
- ensures that the community is supported forever

**Federation and Foundation are active partners on the Life & Legacy Initiative.**

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FOR MORE INFORMATION PLEASE CONTACT

**Micah Garten**, Director of Development at [mgarten@jewishottawa.com](mailto:mgarten@jewishottawa.com) or 613-798-4696 x270  
or **Yudit Simmons**, Annual Campaign Manager at [ysimmons@jewishottawa.com](mailto:ysimmons@jewishottawa.com) or 613-798-4696 x296.