



Panel 3 Meeting 4 Summary 6.25.2015

Attendees: Susan Minsberg, Dan Lepow, Dianne Lev, Nora Murphy, David Milavetz, Susan Robiner, Michael Levitt, Josh Fineblum, Steve Brand

1. Review Meeting 3 Notes

The panel briefly reviewed the notes for the previous meeting. The panel agreed that giving involves time, expertise and money and that the focus of the panel was not solely on increasing giving to the Federation, but to all St. Paul Jewish community organizations.

2. Review Interview notes. What are the themes?

We distributed a packet with interview notes and any resources interviewees suggested the panel members review. Nora facilitated a conversation regarding the interviews panel members conducted between meetings and the key themes learned. Each panel member explained their particular interview and answered questions from the other panel members. After all of the interviews were discussed, some specific themes emerged across the interviews.

1. **Connection to mission is crucial.** This panel has the word “inspire” in the title and the importance of inspiring people to give, by connecting them to your organization’s mission, is of critical importance. With so many places to give, it’s the connection to the work that will make someone give to one organization over another.
2. **People want to know their contribution matters.** Using some sort of incentive or showing a return on investment can encourage giving.
3. **Targeting your message to specific types of givers is helpful.** Everyone interviewed had a matrix or continuum they used to help identify a certain type of giver, the kind of engagement people are seeking, their life stage, and so forth. For example, one interviewee said that there are two different types of givers--one that supports the mission and the other that is a customer and wants the product to be good. The “pitch” to each of these types of potential donors should be different. Another interviewee described a continuum of giving: Ignorance, Awareness, Interest, Experience, Participation, and Ownership. (See Appendix 1 for a discussion of this continuum.)
4. **Stories make the difference.** Many interviewees stressed that stories are crucial. An example of a story for Federation is Chessid Shlomo in Ukraine. Federation volunteers and staff have built relationships and traveled to this Jewish community in Ukraine. The stories from the Ukraine are a driver for continued giving and fundraising for the St. Paul Jewish Federation.
5. **There are opportunities to cultivate giving throughout one’s lifespan.** Giving is about family history and culture, and the influence can go both



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ways. Children can learn about giving from their parents. But because parents are now so involved with kids, there is the opportunity for parents to learn about giving from their children. Some felt that instilling giving early in a child's life is crucial. One example is receiving a pledge card at a bar or bat mitzvah or using nickels and dimes to make up a tree on Tu 'Bishvat.

A brief description of the interview reports discussed during the panel meeting are below. The full set of interview notes can be provided upon request.

Interview with Jeremy Wells: Defining the mission is crucial. What inspires people is connecting to the mission and getting some type of return on your investment.

Interview with Mary Ann Barrows Wark: Mary Ann teaches the concept of Tzedakah to children through biblical and rabbinic sources. Parents also learn about tzedakah from their children. She also discussed Rambam's Ladder of charity and the Stages of Giving by Kenneth Dayton.

Interview with Leora Maccabee Itman: TC Jewfolk uses different brackets of giving and allows people to spread out their contribution over several years. They want to give donors under 40 the chance to experience what it's like to be a preferred donor. There is a focus on quality over quantity and the organization is also transparent about where the funds are going. It's an example of an organization founded by Millennials to meet their needs.

Interview with Rabbi Cohen: He is good at engaging new members and keeping old members engaged. He's personally involved with members, and used to find it difficult to create the bridge from friendship to giving. Now he creates smaller, targeted events that are more impactful. He engages people on campus with a \$400 incentive for taking his course on Judaism.

Interview with the director of Planned Giving, St. Mary's University: The interviewee shared many of the same themes, such as telling compelling stories, making personal connections and that giving is about more than money. It is also important to be welcoming to in-kind giving, such as time or volunteer effort.

Interview with Benjie Kaplan: Benjie defined giving for Hillel as being focused on raising awareness so that people with finances will know that it is a worthy cause to give to. Benjie found that donors gave for seven reasons: Altruist, communitarian, devout, dynast, investors, repayers, socialite. Over the past year, Hillel engaged 100 new donors in a \$170,000 campaign. People are more inclined to give if asked for money with a clear vision and they can see where their donation will end up. Benjie suggested reading Susan Howlett's materials online about strengthening nonprofits at <http://www.susanhowlett.com>



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Interview with Brad Reiners: Brad defined giving as giving without the expectation of getting something in return. He describes that in order to inspire people at his organization he would often ask people about what they find interesting and what it is that would motivate them to give. He discussed the importance of listening and identifying the values of the person you are speaking with.

Interview with Jay Louis: Jay defined giving as both money and time. He discussed the importance of both and that people giving from the heart feel connected and care about the mission. KU Hillel targets two groups, alumni and the greater Kansas City community. What doesn't seem to work for them is the 'old school' model of cold calling and asking for money. Jay compared fundraising to student engagement in that the secret to maximizing is tapping into as many different social networks as possible for viral connections. Finally, Jay suggested looking at Rae Ringel and The Ringel Group. She posts articles on her website on this topic:
<http://ringelgroup.com/index.php>

3. Looking ahead:

The panel had a discussion on why Federation was relevant, which focused on young donors questioning why they need to give to a "middleman". Several reasons were discussed such as demonstrating strength of the Jewish community and the importance of the causes the Federation supports. There was a sense of wanting to know more about why people give to Federation.

The panel decided that it was interested in surveying current givers to learn about the reasons that they give and the stories that connected them with Federation and the St. Paul Jewish community. Following the meeting, the panel will go through the notes for the common themes, and think more deeply about what approach to take, the number of questions, sample size and which slices of demographics to include in the surveying.



Appendix 1: Maximize Donor Engagement

by Lori Jacobwith

Major gifts is a team sport, but it's not speed dating ~ Tracy Ketchem

A month and a half later I'm still quoting and thinking about the recent AFP meeting

I attended with speakers Jean Gorell & Tracy B. Ketchem from the Minnesota Medical Foundation. Here's a recap of what they shared:
For the basis of their presentation they used a visual of the Donor's Emotional Commitment Continuum from Advancement Resources – in Iowa. I have not worked with Advancement Resources myself but found the continuum to be a great visual for understanding how donors gain deeper connection over time.

Ignorance | Awareness | Interest | Experience | Participation | Ownership

The continuum shows the range of emotional commitment. It relates to THEIR experience. It's not about you. It's about their experience of you. The greater the emotional commitment and connection to your organization and their personal values – the larger the gift.

Our goal of course in fundraising is to raise more money from our donors. Two question to ask that will move the needle from one end of the continuum to the other end are:

- What is our donor passionate for?
- Impact. What is the impact of the gift they are making?

If these two aren't deeply embedded the gifts are "go away" gifts. The deeper their commitment is, the further to the right on the continuum – the more questions they'll be asking. And so it's critical that development officers, other staff, and especially board members are listening to and effectively answering the questions being asked.

What are some of the questions people ask at different places on the continuum?

- **Experience**
 - Am I willing to give more?
 - Do I approve of the organizations methods for their fundraising or their programs?
 - Am I getting adequate return on my investment?
- **Participation**
 - Will participate on a committee or a project.
 - They are willing to ratchet up their emotional commitment.



Are my contributions appreciated?
They think about their giving more.

- **Ownership**

Larger volunteer role.
Make respectable major gifts.
Passion aligns with you...your mission is their mission.
Are my contributions appreciated?
Do I feel valued & valuable?

A great question to ask the donor to know them more intimately:

What defines a gratifying gifting experience for you?

The truth is a more gratifying gifting experience is often one where they felt and saw the impact of their gift. It might not even be that large, but it was a stretch for them. Often people's personal goal is to be a part of a specific community of givers because they feel great about it, want to connect with and be seen with the other people at that level of giving.

Great guidelines for how to allocate time in a donor meeting:

- 10-15% of time is spent connecting & relationship building
- 10-15% is spent on an organization update
- 50-55% (over half) is spent LISTENING. IT'S about them. What they are involved in, what's important to them.
- 10-15% – next steps.

Whenever possible MAKE SURE the ball is in your court when you leave the donor meeting. You owe some information or you owe some follow up that will happen at the next personal visit or phone conversation.