



## Panel 3 Meeting 5 Summary 7.30.2015

**Location:** 387 Woodlawn Ave, St. Paul

**Attendees:** Steve Brand, Leslie Hahn, Dan Lepow, Michael Levitt, David Milavetz, Rhoda Mains, Susan Minsberg, and Susan Robiner

*Guiding Questions: If we as a Jewish community want to inspire everyone in this community to give, how do we create a culture of giving? How do we engage people's passions? How do we as a community help people act on these passions?*

**Item 1: Review of previous meeting's notes**—Do these notes capture what was discussed?

The panel opened the meeting by reviewing and approving the previous meeting's notes. Review of the notes sparked a discussion around the relevancy of the Federation and how we want to conduct the interviews. The following questions were raised:

- How do we describe the Federation in a way that will inspire people to give?
- How is Federation relevant to people?
- What needs does it meet?
- Do people see the Federation as a 'cause'?
- What is the "value-added" by the Federation?
- Should the interviews focus on prior giving or on ways to inspire donors to give more?

This led to a discussion about transparency and relevancy in conjunction with the Panel 2 interviews. Millennials highly value transparency and that transparency helps to establish a path of relevancy. The panel discussed that the Federation is the totality of the Jewish community and was a place for all to sit around a table and approach needs, identify and move resources towards community needs as they develop. Younger community members may not be receiving that message or see the relevancy in that cause. They also may not see themselves as members of the community. The Federation needs to be viewed as credible to current and future donors in making allocation decisions. Donors must feel that their dollars are directed to causes that they care about, and that the money is being effectively allocated.

The panel members identified three questions that people may ask before giving to the Federation:

- 1) Do I trust the Federation?



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- 2) Can they do a better job identifying needs in the community than I can?
- 3) Do they more effectively support organizations than I can as an individual?

Panel members identified several things that need to happen in order for potential donors to answer 'yes' to these questions.

- Donors should know where the Federation is located and that they are welcome in Federation and agency activities.
- The younger generation should be made to feel a part of the Jewish community.
- It should be easy for the younger generation to understand how the Federation makes decisions.

One idea regarding allocations is that young leadership groups, or other groups such as the Maimonides Society, should be given responsibility for a sum of money and go through an allocation process for that money.

An important thing to remember is that we "cross-subsidize" each other. For example, in a synagogue, young families need more services than older members but they don't necessarily have the resources. So the older members sustain them. There needs to be a safety net in the greater community for those services for which individuals don't necessarily feel a passion.

**Item 2: Reviewing Panel 2 Interviews**—Excerpts on spending patterns, connection to mission, and giving of money and time.

The panel discussed what they learned by reading excerpts from five of the ten Panel 2 interviews of 22 – 35 year olds. They identified two primary themes—millennials have fewer resources than the boomer generation and young people spend money, but it's about relevancy and urgency, which raised these questions:

- 1) Should the Federation be more flexible regarding who they fund?
- 2) Are the Federation's giving priorities aligned with the Millennials' giving priorities? If not, what ought to be done, if anything?

Panelists thought that the interviews suggest that next generation might give less due to a lack of information and education regarding the Federation allocation process, a lack of engagement of Millennials in allocations, and loose ties with their Jewish backgrounds.

**Item 3: Determining Panel 3 Interview Methodology and Protocol**



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The panel decided that conducting interviews was the correct path forward to learn more about what has inspired and will further inspire people to give in the St. Paul Jewish community. They chose to conduct interviews with 3 different age groups: 18-35, 35-50 and over 50. Each group will have questions specific to their place in life. Interviews will occur similarly to how the interviews with experts happened— Panelists will interview 3 people of their choosing (hopefully one in each age group) and share details with the rest of the panel.

Potential interview questions are :

- 1) If you had all the money in the world-
  - a. Where would you give?
  - b. Where in the Jewish community would you give?
  - c. Is the Federation one of the organizations in the Jewish community you might give to? Why or why not?
- 2) If you are already giving, why do you keep giving?
- 3) What inspires you in your daily life? What gets you excited?
- 4) Under what circumstances would you start giving?
- 5) (If the stage in life was not mentioned in the answer to the previous question) In what stage of your life would you start giving?
- 6) What makes you feel good when you give?
- 7) What have you given to in the past? What motivated you to give?
- 8) What would need to happen for you to increase your gift?
- 9) What defines a gratifying gifting experience for you?
- 10) Can you share a story about a giving experience that was particularly meaningful for you?

Panelists may also want to ask about potential recommendations such as giving circles or efforts to educate younger people about Federated giving processes.

### **4. Next Steps**

Moving forward with this interview process will require taking the following steps.

- David will prepare a spreadsheet to send to the panel so that each person can identify the 3 people to be interviewed.
- David will prepare an introductory e-mail that panelists will send to their proposed interviewees like was done with the first set of interviews we did.
- David will collect the data as was done with the first set of interviews.

Ideally interviews will be conducted before the holidays.