



## Panel 3 Meeting 1 Summary 3.1.2015

**In attendance:** Susan Minsberg (Chair), Steve Brand, Leslie Hahn, Dan Lepow, Diane Lev

**Location:** Susan Minsberg's Home

**Time:** Sunday, March 1, 2015, 7:00-8:30pm

### 1. Introductions:

Panelists introduced themselves and explained why they joined the panel and what their hopes were for the process. Some panelists were there because of their experience in development, others because of their own experience giving to the Jewish community, and others were there because of their hope of connecting with future generations. One person summed it up like this: "I want to help St. Paul feel proud because there is a lot to be proud of." This person described her hope that the panel would develop something that excited people and inspired them to give.

### 2. Review background leading to formation of this panel:

Susan then provided a background to the panel on the Community Planning Process. She reviewed the data from Phase 1 of the listening sessions, the Leadership Team, how the 5 priorities were developed and how the panels were formed.

When reviewing the data we focused on the following concern as articulated in the report produced by Rainbow Research after the listening sessions.

**Strategic Planning and Fundraising:** Participants are concerned about how our community raises funds, the number who contribute and declining commitment to giving. They also are concerned about the adequacy of strategic planning, including accurate assessments of community change and measurement of success.

This led into a short discussion of two additional data the panelists were interested in seeing: 1) learning more about the work of the other panels and 2) what particular trends or themes have occurred in Federation campaigns over the last ten years.

### 3. Group Discussion:

During this portion of the meeting panelists were asked about what inspires them and what led them to take action and to make a financial contribution because of that inspiration. Some themes we heard were:

- **Raising money with a vision.** An example is the remodel of the Talmud Torah Library. It was very inspired and a place where adults and kids came together. One person suggested that people like to contribute to “bricks and mortar”.
- **Aiding those in need.** “My inspiration came from aiding the most vulnerable and those who need it most.” A motivating question for this person is, “What is it that we do to make someone’s life better?”
- **Role Models.** Another shared that he was inspired by his role models volunteering and giving back. His inspiration also came from personal impact and doing something meaningful. He shared, “My mentors set an example for me.”
- **Connection to my ancestry.** Another shared, “My connection to my family and ancestors inspires me to carry the people and the values forward.”
- **Children.** For another person the inspiration came when she had her first child. “My inspiration and connection came once I had my first child.”

**Triggering motivation.** After people shared the reasons for giving we discussed that it is important to identify what triggers people’s motivation. Did they do good things for the community because they saw a need or because of their own interests? We need to identify a range of places and causes where people might be motivated to give.

**Creating a culture of giving.** We also discussed the role that cultural norms play. One person shared his experience in a different community where they were able to create a culture where it was expected that everyone gives back and that there would be a point in time when you would become a community leader.

#### 4. Focus and Scope:

The panel then talked about how to define giving and inspire. At first the panelists believed that giving was about time and money. Through further conversation, expertise and the type of time given became a part of the conversation. So “giving” can be accomplished in different ways, whether doing something that takes a specific skill or more as a “generalist”.

Another nuance was added to this part of the conversation about how people’s engagement at one level changes over time and that once a relationship is built you have to adapt and keep working at the relationship.

Someone emphasized that we should not forget about baby boomers because they likely have time and money to give. Even if they haven’t been connected in the past, we should try to get them involved as retirees.

#### 5. Closing and Next Meeting

The panel closed the meeting by listing things to read and people to talk to. Some examples were:

- Judy Blessig, Acumen
- Lisa Lane

- Amy Alch
- Journal of Philanthropy
- AFP (Association of Fundraising Professionals)
- Sid Schwartz

The panel agreed to schedule the next meeting through a Meeting Wizard request and that there was a preference for meeting during the weekend.