

The Five Whys

“Tell me why I should give a gift to the Federation.”

Think about the following to help you answer your why: What is the collective cause or belief your Federation exists for? How does your Federation create a better vision of the future? Why does your Federation matter? How does the Federation help donors achieve their own purpose?

Why?

Why?

Why?

Why?

Why? I know....

Use this technique to get to the root of an issue, an opportunity, a problem or a question. When using it to explore the core reason for being, ending with “I know” is a powerful way to articulate your true mission.

The Federation Story Spine

Once Upon a Time (I want to tell you about)

Everyday...

But, one day...

Because of that...

The Clincher – This Is Where Federation Steps In

Until finally...

And today, (or every day since)...



**Jewish
Federations**
of North America



Fundraising: It's A Team Sport & Finding Our Why

Portland, August 28, 2025

Leslie K. Pomerantz
Executive Director, Fundraising Institute
Leslie.Pomerantz@jewishfederations.org



It's a Team Sport....

- All of us are part of the fundraising team.
- There are many opportunities EVERY DAY for each of us to play a part
- It's not as scary as it seems
- It's all about.....

CULTURE!!!!



Everyone in the federation
communicates with donors or
prospects.

Building **Flourishing** Jewish
Communities in our hometowns and
Around the World



Everyone at the federation raises money — directly or indirectly. Because.....

**WE ALL communicate with donors or prospects.
Long before the ask.**

Kevin Brown, *Everyone is a Fundraiser*



Three Categories of Fundraisers

The Ambassador

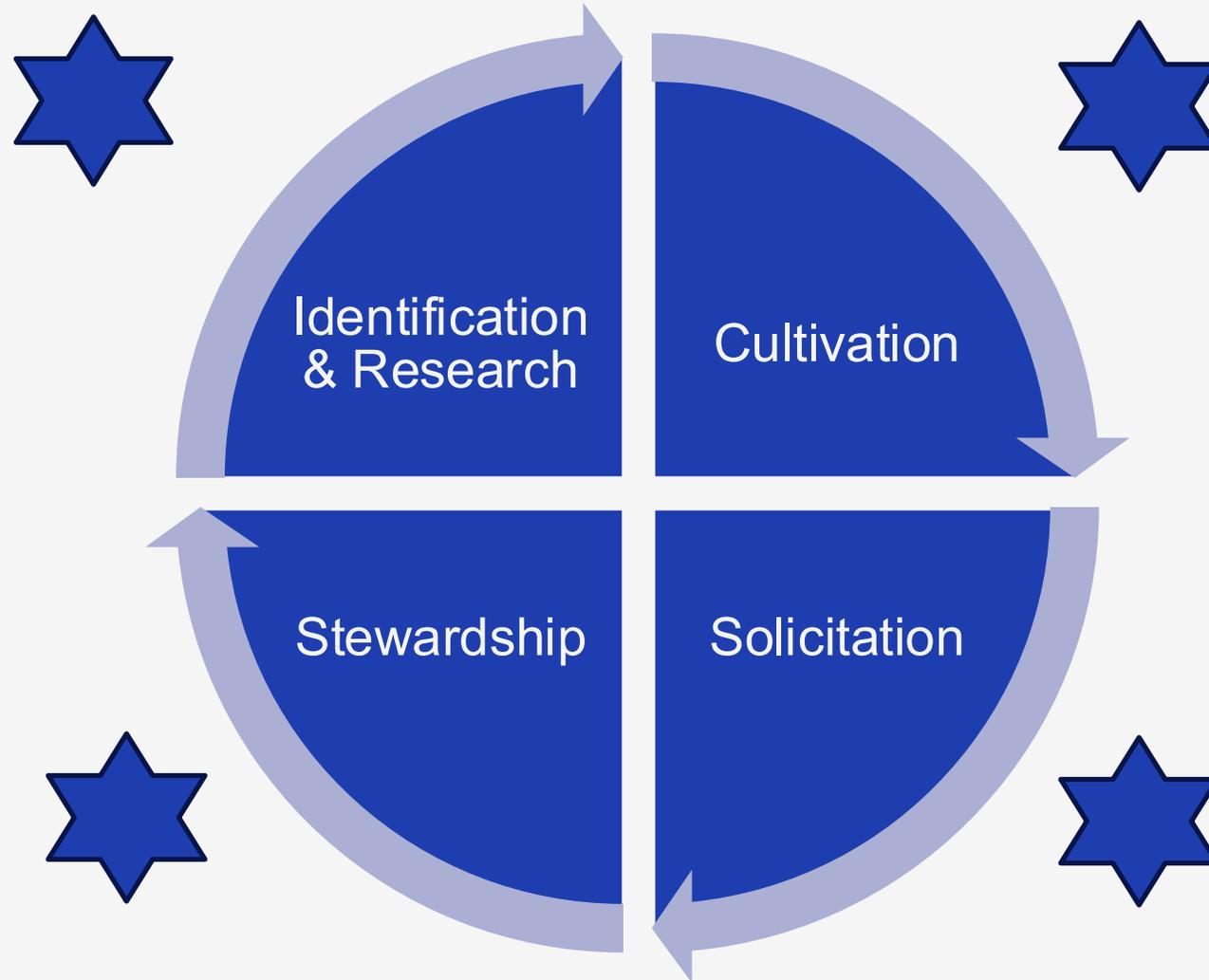
The Advocate

The Asker

Kay Sprinkel Grace, *The AAA Way to Fundraising Success*



The Donor Cycle





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The Ambassadors

- Build Rapport
- Open Doors
- Lay the Groundwork for Potential Engagement

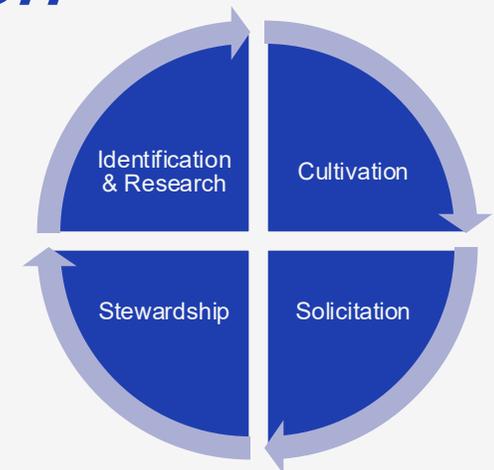
EVERYONE

Kay Sprinkel Grace, *The AAA Way to Fundraising Success*



Ambassadors are poised to identify & research donors. **They are friend makers.**

In a role at the Federation, where are places or when are times that we have opportunities to identify potential donors? Make a list of opportunities when or where we have the ability to identify potential Federation supporters.





The Advocates

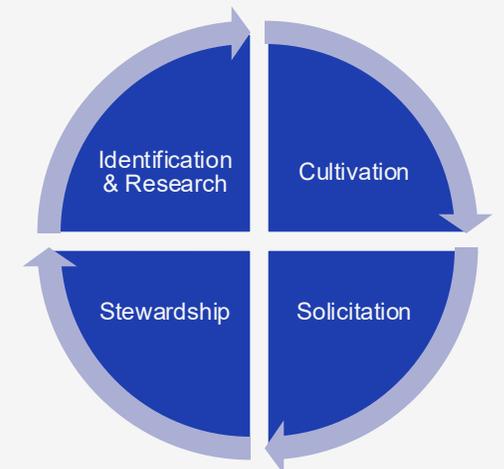
- **Speak up & out!**
- **Educate, may speak at events or meetings**
- **Solidify credibility**
- **Deeply knowledgeable, answer challenging questions.**



Advocates are poised to cultivate donors. **They are case makers.**

*In a role at the Federation, who are your advocates?
Where can we strategically place advocates? Where are places or when are times that we have opportunities to educate, inspire, move prospects?*

Who are advocates you have not used yet?





The Askers

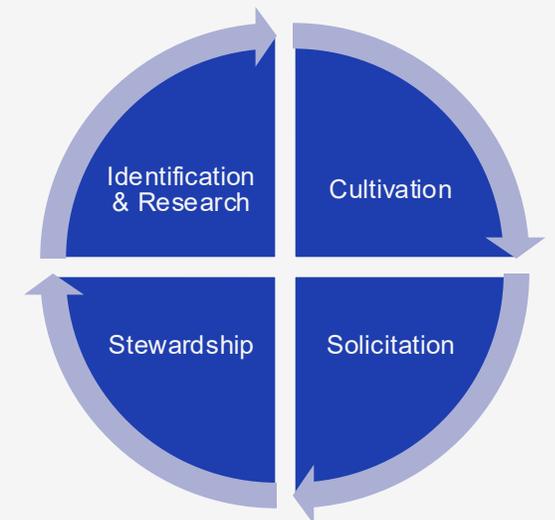
- **The Closers!**
- **Interest → Action**
- **Able to tailor messaging**
- **Closes with confidence**
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Askers are poised to solicit gifts. They are rain makers.

In a role at the Federation, who are your askers? Where can we strategically place askers?

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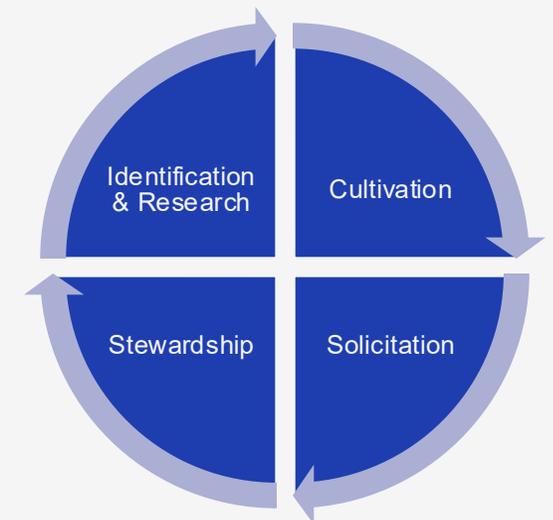




Ambassadors, Advocates and Askers are poised to ALWAYS steward gifts.

How do we continuously find ways to remind donors how important they are to us?

**Be the organization that loves your donors
THE MOST**





Ambassadors, Advocates, Askers

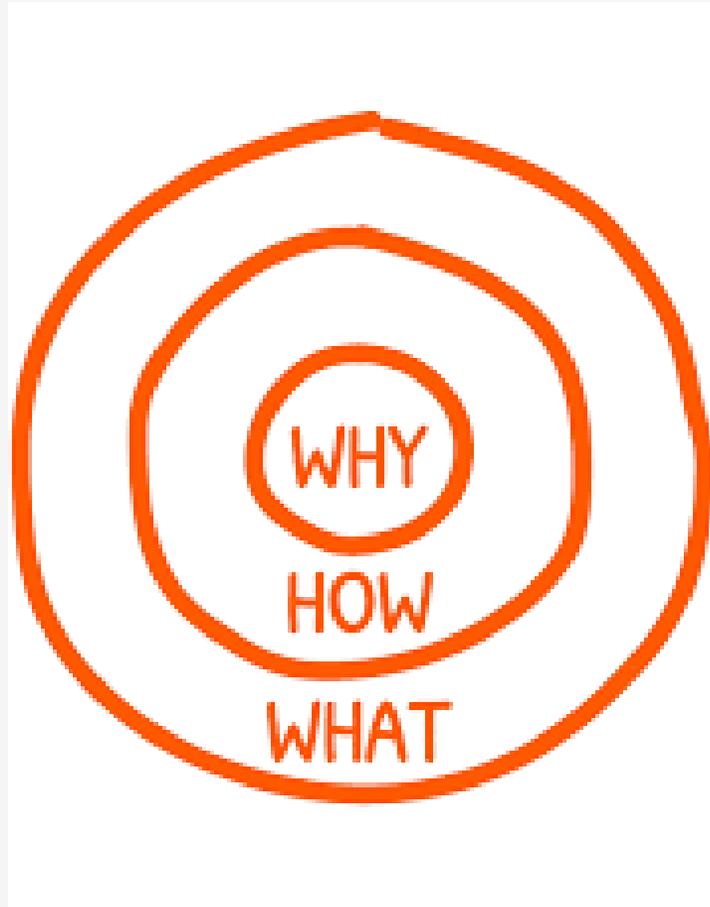


Answer The Following Two Questions:

1. What does your federation do?
2. How does your federation do it?



Your “Why Federation?”



The Golden Circle

Simon Sinek

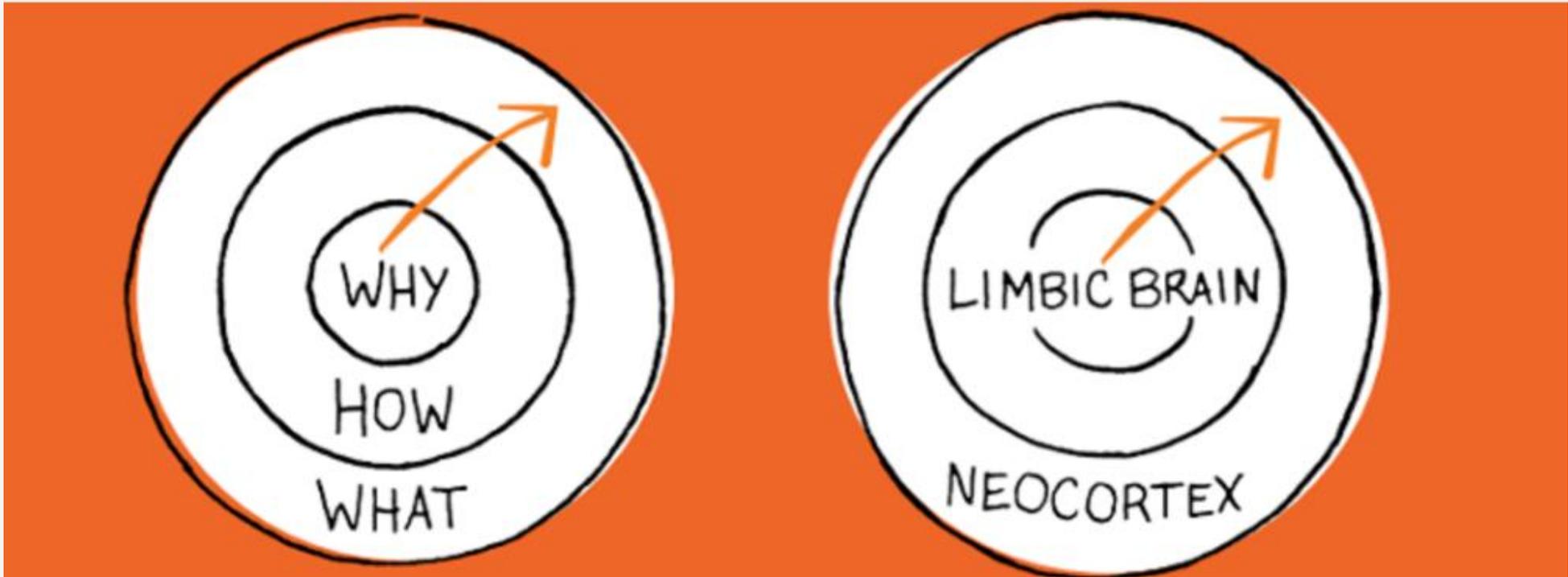
What. *Every organization on the planet knows WHAT they do. These are products they sell or the services they offer.*

How. *Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.*

Why. *Very few organizations know WHY they do what they do. WHY is not about raising money. That's a result. WHY is a purpose, cause or belief. It is the very reason your organization exists.*



It is biology....





Why is probably the most important message that an organization or individual can communicate as this is what inspires others to action. ‘Start With Why’ is how you explain your purpose and the reason you exist and behave as you do.

Simon Sinek



Why does the federation exist? Or, Why do I give? Or, Why I am asking you to give?

1. Because the federation makes smart decisions on behalf of the Jewish community.
2. The federation is positioned and takes the time to really understand what the community needs.
3. The federation is committed to the value of kol Yisrael aravim zeh b'zeh, that all of us are responsible for the other.



4. There is a beauty in our shared history and values, that we will not stop until every Jew gets what they need.

5. I know that the federation is here for our entire community.

Think about the following to help you answer your why: What is the collective cause or belief for which your federation exists? How does your federation create a better vision of the future? Why does your federation matter? How does the federation help donors achieve their own purpose?



Please give a gift to the federation's annual campaign.

Why?

Why?

Why?

Why?

Why? We know....



Communication

- 55% body language
- 38% tone of voice
- 7% words



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of North America

Thank You!



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of North America

Campaign Cabinet Strategy Session

Portland, OR
August 28, 2025



Engaging Your Solicitation Team

- **Have clear roles, responsibilities and expectations**
- **Provide training and support**
- **Recognize wins (individual and collectively)**
- **Make sure to steward your solicitors as well**

Remember – it's a partnership!



In Sukkah 49b, Rabbi Elazar says

*“Kol h’oseh tzedakah umishpot, k’ilu milay kol ha’olam
kulo chesed...”*

*Anyone who performs charity and justice is considered
as though he filled the whole world in its entirety with
kindness”*



Clear Expectations

- Campaign Timeline
- Time commitment
- Goal – personal and overall
- Check-in frequency
- Donor follow-up

- **What are their expectations of you?**



Making the Ask

- Training is essential!
- Share Federation resources – annual report, Marc’s Remarks, upcoming events/speakers
- Practice storytelling
- Address any worries/fears
- Share your tips!



Thoughtful Gift Solicitations



Personalized Asks

What is the donors WHY?



Bring Others In

Donors and Volunteers



Relationship Building

Follow up is key!



Motivate and Celebrate!



- Celebrate progress: highlight gifts secured, # of calls made.
- Share 1 inspiring story or donor success.
- Give a “challenge of the week” (e.g., make 3 calls by Friday)
- Recognize the commitment and hard work of solicitation team



Keys to Campaign Success

- **Use your Case for Giving**
- **Build relationships, not just donations**
- **Stay organized, creative, and adaptable**
- **Inspire others with your passion**



Thank You!



Nurturing a Culture of Philanthropy

Leslie K. Pomerantz
Executive Director, Fundraising Institute
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- A culture of philanthropy is achieved when **most people in the organization (across positions) act as ambassadors** and engage in relationship-building. **Everyone promotes philanthropy and can articulate a case for giving.** Fund development is viewed and valued as a **mission-aligned program** of the organization. Organizational **systems are established** to support donors. The **executive director is committed and personally involved** in fundraising.



Building a culture of philanthropy

**How is your organization
doing?**



A Culture of Philanthropy



■ Belonging ■ Transparency ■ Ownership ■ Collaboration ■ Celebration



A Culture of Philanthropy



Feeling of Belonging

Create a feeling of being:

- Welcomed
- Known
- Included
- Supported
- Connected



A Culture of Philanthropy



Transparency

- Builds trust with donors
- Fosters Accountability
- Encourages Collaboration
- Strengthens Relationships
- Enhances Public Perception



A Culture of Philanthropy



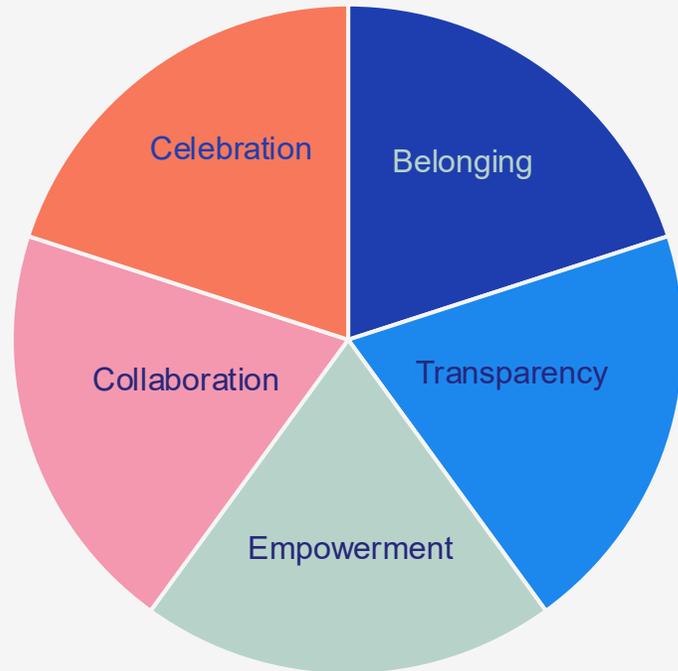
Empowerment

- Is motivating
- Fosters a sense of ownership
- Encourages innovative solutions
- Leads to more passionate & committed donors
- Strengthens community involvement

Power and Empowerment in a Nonprofit Organization



A Culture of Philanthropy



Collaboration

- Amplifies Impact
- Pools resources and expertise
- Fosters Innovation
- Streamlines Efforts
- Enhances Capacity
- Shared Responsibility



A Culture of Philanthropy



Celebration

- Reinforces the importance of giving
- Acknowledge and appreciates gifts
- Fosters a positive and supportive environment
- Fundraising becomes a source of pride and fulfillment



Brainstorming Session....

Pick a Scenario:

You are working with the chair of your committee and getting ready for a new fiscal year. You want and need those around the table to be invested in what you are tasked with doing. In addition, each member of the committee will be asked for a minimum gift for the organization's campaign this year. How are you going to approach this?

You are part of an organization that has lots of people involved, but not giving to your fundraising efforts. How do you begin to create the kind of culture you need to inspire them to be givers?

You are gearing up for your staff retreat and really want everyone to think of themselves as part of the development/fundraising efforts. How are you going to challenge each person to think about their role in this new way?



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Four Categories of Fundraisers

The Ambassador

The Advocate

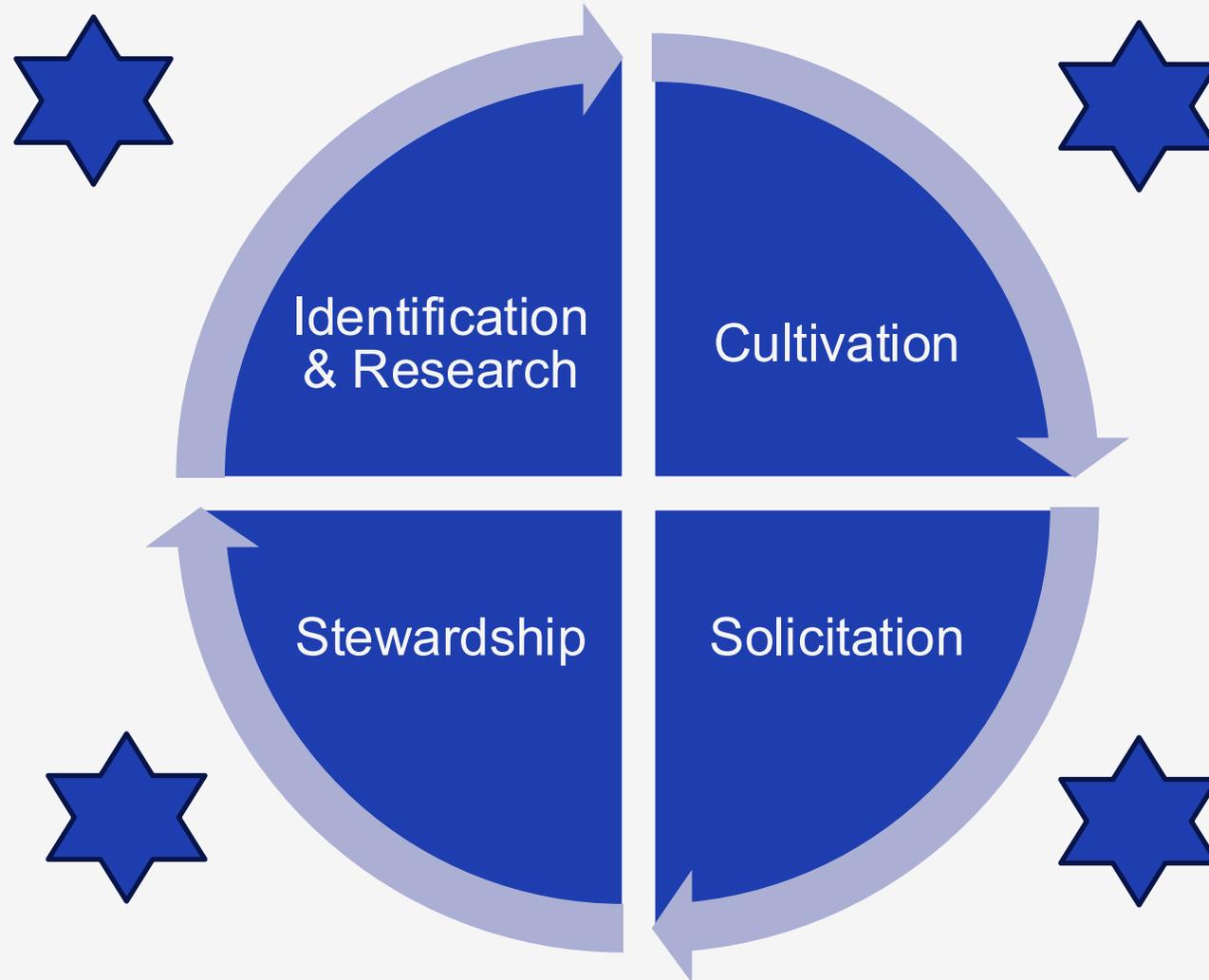
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The Donor Cycle





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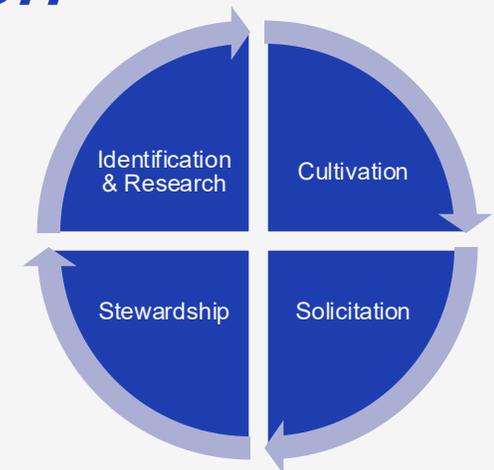
- Build Relationships
- Organize
- Lay the groundwork for Potential
- Management

EVERYONE



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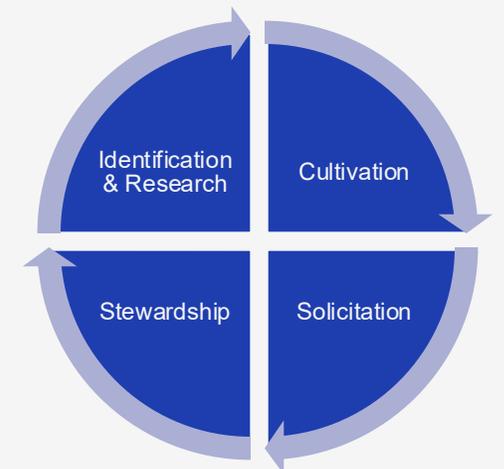
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The Architects

- **Set up the structure**
- **Pull together resources needed to get things done**
- **Identify potential assets that can be used**
- **Create “moves” for the prospects**

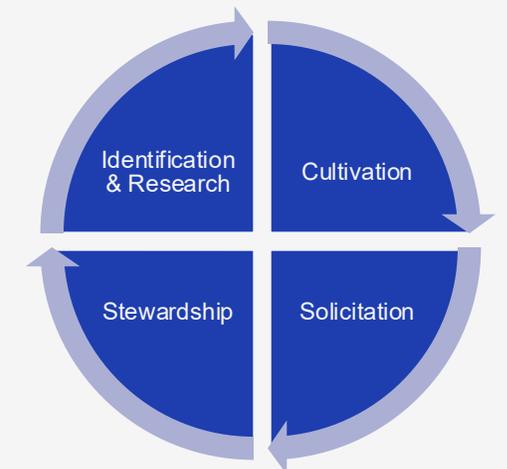


Architects are poised to steward gifts/donors. They are loyalty makers.

In a role at the Federation, who are your architects?

Where can we strategically place architects? Where are places or when are times that we have opportunities to educate, inspire, move prospects?

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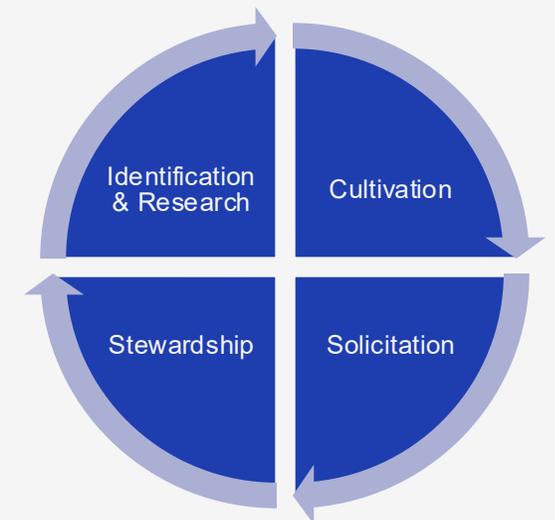
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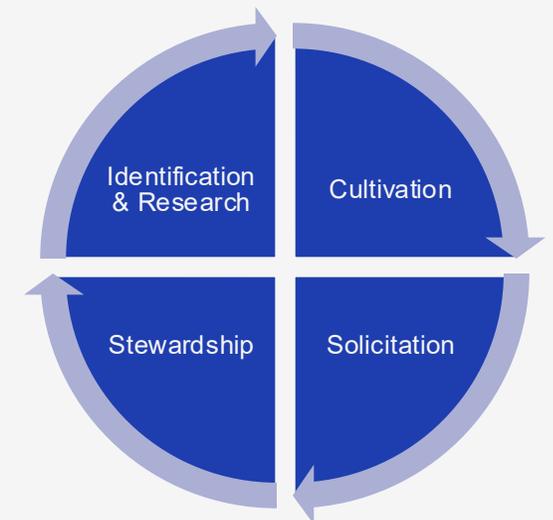




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Thank You!



**Jewish
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of North America

The Art of the Ask

The Secrets You Need to Know!



Learning Objectives

Get to know your donor

- To explore building a strategic approach to each interaction
- To learn the steps necessary to have the most meaningful conversations
- To understand the components of active listening

Know your product

- To learn the tricks of storytelling

Gratitude

- Thanking is key! Learn ways that each of us can show gratitude towards our donors



**You miss 100% of the shots
you don't take**

Wayne Gretzky



Key Components Needed





Build a Rapport:

Creating & Nurturing Relationships with our Donors

Start with
the 5 Ps

Linda A. Hurwitz



Build a Rapport:

Creating & Nurturing Relationships with our Donors



Prepared

- What is your goal for the meeting?
- **KNOW** what you want to say
- **KNOW** why you want to say it
- **KNOW TO WHOM YOU ARE SPEAKING!**



Build a Rapport:

Creating & Nurturing Relationships with our Donors

Personal

- Use their name constantly
- Keep eye contact
- Make them feel good
- **THIS IS ALL ABOUT THEM**



Build a Rapport:

Creating & Nurturing Relationships with our Donors



Positive

- Your positive vibes are contagious!
- People want to be around upbeat & enthusiastic people!
- Focus on impact to strengthen long term relationship



Build a Rapport:

Creating & Nurturing Relationships with our Donors



Passionate

- You love what you do.... Show it!
- Share your “Why Federation”?
- People want to hear & learn from your passion



Build a Rapport:

Creating & Nurturing Relationships with our Donors



Persistent

- This **P** depends on your goal



Active Listening & Asking Great Questions



Active Listening

Active Listening is when you make a conscious effort to hear not only the words that another person is saying but, more importantly, the **complete message** being communicated.

- Pay Attention!
- Show that you are listening
- Provide Feedback
- Defer Judgement
- Respond Appropriately



Asking Great Questions

Require a narrative for an answer

“Why do you give?”

Cannot be answered by a simple “yes” or “no”

“How did you first get involved?”

Begin with what, why, where, how, who, or when

“Is there someone in your life who has been a role model for you...who inspired you to do what you do? Tell me about him or her.

Do not lead the person in a specific direction

“What excites you about our Jewish community?”



Storytelling



Why Storytelling?

- Stories add emotion to information
- They add color and depth
- They allow people to connect with the message in a more meaningful way
- Stories are universal. It's part of our neurological hardwiring: stories consistently engage more parts of our brains than facts alone, including an increased release of what they call the “empathy” hormone.



Why Storytelling?

Research by Dr. Paul Slovic demonstrates the power of the “singularity effect”: that our compassion—and charity—is highest when focused on one individual life.

Wharton professor Deborah Small found that more donations were generated when focusing on a single, tangible individual than a larger statistical group.



As One, We Inspire Jewish Connection

Finding Strength in Community

Leah H., a high school student, felt alienated at school after verbal attacks. She joined a youth program, supported by Jewish Federations, where she connected with peers who shared similar experiences. The program gave Leah the strength to face these challenges and embrace her Jewish identity.



Creating Authenticity

Tell a genuine Story

Make it personal

Be Transparent

Let your passion come through!

Bring visuals

Highlight real impact



The Story Spine

8 Sentence Starters



The Beginning

1. Once Upon a Time.....
2. Everyday....

The Event

3. But, one day.....

The Middle

4. Because of that....
5. Because of that....
6. Because of that....

The Climax

Until Finally...

The End

And ever since then...





Now It's Your Turn!

The Beginning

The Event

The Middle

The Climax

The End

Once Upon a
Time....

But, one day....

Because of
that...

Until Finally...

And ever since
then....

Everyday...

Because of
that...

Because of
that...



Thank Thank Thank!

How do you thank your donors?



Thank You!