Synagogue Leap Program

Vitalize Your Synagogue’s Fundraising

Thursday, March 3, 2022
9:45 am – 11:00 am
In the midst of winter, I found there was, within me, an invincible summer.

Albert Camus
Let’s Level Set

These are the fundraising challenges you shared with us:

**Sample Statistics**

9 Synagogues

**Size**
- 1 Large
- 8 Small

**Denomination**
- 5 Independent
- 2 Reform
- 1 Conservative
- 1 Orthodox
Class Overview & Objective

As synagogues throughout greater Boston endeavor to build vibrant 21st century Jewish communities, it is an opportune time to strengthen funding models.

This includes, but is not limited to, reimagining the ways donor relationship development and fundraising are viewed and pursued.

The objective of this class is to inspire you to think about your synagogue-based fundraising through a new lens and build an arsenal of effective strategies and tactics to lead to greater vitalization.
Agenda

- Culture of Philanthropy
- Steps Toward Growth-Oriented and Sustainable Fundraising
- Pulling the Pieces Together
Warm Up: Purpose Compels Philanthropy

Why might a member of your congregation community be inspired to invest philanthropically, above and beyond the dues they already pay?

“People want to be part of something that makes a difference, that transcends the ordinary. They want a star to steer by. They need a clear, compelling mission—a reason for being, a purpose.”

— Frances Hesselbein
Culture of Philanthropy
# Check Assumptions & Calibrate to Reality

Joining a community doesn’t lead to instant donations. Begin with a deep understanding of congregant motivations and your willingness to create opportunities aligned to those interests.

<table>
<thead>
<tr>
<th>Congregants May Not:</th>
<th>Synagogue Culture May Not:</th>
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<tbody>
<tr>
<td>Know, or be compelled by, philanthropic call-to-action</td>
<td>Support a donor-centric ethos</td>
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<tr>
<td>See themselves as investors (rather consumers)</td>
<td>Invest in a fundraising program</td>
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<td>Be philanthropically motivated or financially capable</td>
<td>Have a philanthropic call-to-action</td>
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<td>Have a leader with influence to champion efforts</td>
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## Beyond Fundraising

**Fortify a Culture of Philanthropy**

Organizations that have a strong culture of philanthropy have greater capacity for effective fundraising. They share four critical priorities:

<table>
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<tr>
<th>Shared Responsibility for Development</th>
<th>Integration &amp; Alignment with Mission</th>
<th>A Focus on Fundraising as Engagement</th>
<th>Strong Donor Relationships</th>
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<tr>
<td>Fundraising isn’t just one person’s job or the job of one department or board committee. Everyone—staff, executive director, constituents, board &amp; volunteers—shares responsibility for fund development.</td>
<td>Fund development is a valued and mission aligned component of the organization’s overall work, rather than a standalone function.</td>
<td>Fund development is no longer separated from engagement. This reflects that people today are connecting with nonprofits via multiple channels (e.g., social media, volunteering, blogs, meetups, petitions) &amp; engaging with them in multiple ways (e.g., donors, volunteers, board members, constituents).</td>
<td>Donors are seen as authentic partners in the work, not simply as targets or dollar signs. These organizations establish systems to build strong relationships and support donors’ connection to the work.</td>
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BEYOND FUNDRAISING

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Building the Team

The quintessential fundraising partnership is by nature interdisciplinary and comprises several constituents inside and outside the organization — in addition to the Rabbi(s).
Major Donor Relationship Development Cycle

We are in search of mutually beneficial relationships that enable us to build healthier, stronger, productive, and lasting reciprocal impact.
Strengthen COP Leads to More Capacity

Considering your colleagues and Board members, who would be most helpful in advancing fundraising at your synagogue?

What steps will you take to inspire greater engagement among this team in this vital work?
Steps Toward Growth-Oriented and Sustainable Fundraising
Current State Assessment

Take stock of your current fundraising activities to determine your opportunity areas.
Growth-Oriented & Sustainable Giving

With growth-oriented and sustainable giving, there is intentionality around deepening relationships with prospective & existing donors along the donor journey to yield increased and long-term results.

Pipeline Development
Non-Donor Constituents

Community Donor Relationship Program
Community Donors

Middle Tier Donor Relationship Program
Middle Tier Donors

Major Donor Relationship Building
Major Donors

Impact Philanthropy
Impact Donors & Funders

Planned Giving Across All Points of the Journey

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## Data: Foundation of Strategic Fundraising

What is it telling you? Where can you push growth and sustainability?

<table>
<thead>
<tr>
<th>Giving Level</th>
<th>Number of Families</th>
<th>Total Annual Giving</th>
<th>New and/or Upgraded Gifts</th>
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<tr>
<td><strong>Non Donor Constituents</strong></td>
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<td>(Early-childhood; Camp; Religious School; Empty-nesters; High Holiday)</td>
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<tr>
<td>Non -Donors (and lapsed)</td>
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<td>Community Donors</td>
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<tr>
<td>&lt;$500</td>
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<td>$500 - $999</td>
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<tr>
<td><strong>Middle Tier Donors</strong></td>
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<td>$1000- $4999</td>
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<tr>
<td><strong>Major &amp; Impact Donors</strong></td>
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<td>$5000 - $9999</td>
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<td>$10,000+</td>
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<tr>
<td><strong>Total</strong></td>
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Systematic Approach to Growth

Instead of episodically working on fundraising, a systematic approach in three key areas can address common barriers, such as getting unstuck and prioritizing efforts against limited time.

Upgrade Existing Donors
Those with greater capacity, esp. through Yom Kippur appeal

Reactivate Lapsed Donors
Those who supported past capital efforts

Acquire New Donors
Those who have not given to any effort*

*Places to Source: Early-childhood; Camp; Religious School; Etc.
Decide How to Engage

You need to know the **who**, the **what**, in order to figure out **how** to engage in a way that deepens the connection and relationship with your donors. Ideas to keep in mind: Enlist strongest proponents; be intentional and map out interactions.
Connect to the Why

After who, what, and how comes why. Give major donors reasons they may want to deepen investments in your synagogue.

1. Offer donors/prospects what they can’t get elsewhere.

2. Provide experiences money can’t buy.

3. Offer donors/prospects outlets for their talents and passions.

4. Show them how they continue to make a difference.

5. Share how even greater difference can be made with their support.
Compel Impactful Giving

What are the unique experiences, communications, recognition opportunities, and/or other touchpoints that might inspire your high-potential major donor prospects to give more impactfully?
Pulling the Pieces Together
Apply Your Learnings

Think about your synagogue-based fundraising through a new lens, and build an arsenal of effective strategies and tactics designed for greater vitalization.

1. Identify Purpose to **Compel Philanthropy** in Your Organization
2. Build a Culture of Philanthropy: **Focus on Augmenting Your Team**
3. Assess Your Data to Establish a Major Donor Prospect Pipeline: **Upgrade, Lapsed, New**
4. Cultivate Prospects to Align Donor Proclivities & Priorities with Strategic Direction
5. Generate Top Donor Pipeline List and Map Out Plans for Each One

**Enjoy Impactful Giving**
Identify prospects you know, what they care about, and how best to engage them. Use your master calendar of events and programs to stimulate your thinking.

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<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>How</th>
<th>Why</th>
<th>Relationship Manager</th>
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In Closing

“The concrete is wet right now in a way that I’ve never seen in my career. There’s a lot more opportunity now to reimagine. My prediction is, in three years’ time, when we look back at this period, there’ll be a real difference between those organizations who saw this as just a pause, and those organizations who saw this as a chance to reframe their work.”

— Henry Timms, CEO of Lincoln Center, which is shifting to become more of a civic institution as well as a cultural one