

Milwaukee Jewish Federation

Hannah Rosenthal, CEO & President
Dan Bader, 2015 Board Chair
Andrea Schneider, 2015 Campaign Chair
Joan Lubar, 2015 Women's Philanthropy President
Lauri Roth, 2015 Women's Campaign Chair

Programs and Services of the Milwaukee Jewish Federation

Coalition for Jewish Learning
Israel Center
Jewish Community Foundation
Jewish Community Relations Council
Jewish Museum Milwaukee
Nathan and Esther Pelz Holocaust Education Resource Center
The Wisconsin Jewish Chronicle

Milwaukee Jewish Federation Partner Agencies

BBYO – Wisconsin Region
Harry & Rose Samson Family Jewish Community Center
Hillel Foundation - University of Wisconsin (Madison)
Hillel Milwaukee
Jewish Beginnings Lubavitch Preschool
Jewish Family Services
Jewish Home and Care Center
Milwaukee Jewish Day School
The Academy (Hillel)
Yeshiva Elementary School

Major National and Overseas Beneficiaries

American Jewish Joint Distribution Committee
Jewish Agency for Israel
Jewish Federations of North America

Properties of the Milwaukee Jewish Federation

Evan and Marion Helfaer Community Services Building
Golda Meir Apartments
Habush House
Hillel Milwaukee Student Center/Joseph and Vera Zilber Building
Maurice S. Surlow Senior Residences
Max and Anita Karl Jewish Community Campus
Shlichut Residence

A TOOLKIT FOR CAMPAIGN VOLUNTEERS



2015 Annual
Community Campaign

MILWAUKEE
JEWISH FEDERATION

1360 N. Prospect Ave. Milwaukee, WI 53202
(414) 390-5700 | MilwaukeeJewish.org



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THANK YOU FOR VOLUNTEERING

Thank you for volunteering to participate in the Milwaukee Jewish Federation's 2015 Annual Campaign. The board of directors, the staff, and most important, the beneficiaries of campaign funds are grateful for your help in strengthening our local and worldwide Jewish communities. The information in this brochure is organized into four sections, intended to support and facilitate your outreach to donors:

1. Making the case for giving
2. Solicitation guide
3. Beyond the Annual Campaign
4. Following up

Andrea Schneider
Andrea Schneider
Annual Campaign Chair

Lauri Roth
Lauri Roth
Women's Campaign Chair



Matching Gifts

Sometimes, increasing your gift can be as easy as a visit with the Human Resources department at your workplace. Hundreds of companies offer matching gift programs and can double or triple the impact of your gift. Please ask your donors to inquire with their employer about matching gifts and encourage them to visit the Annual Campaign page of the Federation website (MilwaukeeJewish.org) for more information.

DEVELOPMENT STAFF CONTACT INFORMATION

- Lauren Berger - Young Leadership Director
(414) 390-5702, laurenb@milwaukeejewish.org
- Amy Blumenthal - Women's Philanthropy Director
(414) 390-5713, amyb@milwaukeejewish.org
- Caren Goldberg - Executive Director Jewish Community Foundation
(414) 390-5737 careng@milwaukeejewish.org
- John Grochowski - Development Database Administrator
(414) 390-5753, johng@milwaukeejewish.org
- Noach Jubelirer - Development Officer and Agency Liaison
(414) 390-5718, noachj@milwaukeejewish.org
- Amy S. Kahn - Vice President of Development
(414) 390-5743, amyk@milwaukeejewish.org
- Shelly M. Sampon - Campaign Manager
(414) 390-5723, shellys@milwaukeejewish.org
- Sowa Unora - Executive Assistant
(414) 390-5712, sowau@milwaukeejewish.org
- Jen Vettrus - Development Associate
(414) 390-5722, jenv@milwaukeejewish.org





Donor Advised Funds

What is a Donor Advised Fund and why should I have one?

Creating a donor advised fund simplifies the process of charitable giving. Donors make a gift to the Milwaukee Jewish Federation's Jewish Community Foundation (JCF) and take a charitable deduction for the full value of the gift. Making gifts of appreciated stocks to a donor advised fund can provide significant tax benefits.

The JCF places the gift in a charitable fund, and donors make recommendations for the distribution of gifts to Jewish or non-Jewish charities. The JCF manages the fund, handles all of the record keeping and reporting, and distributes the gifts.

FOLLOWING UP

Making the Gift

There are many ways to make a campaign gift.

◦ **Mail a check to:**

Milwaukee Jewish Federation
1360 N. Prospect Avenue
Milwaukee, WI 53202

- **Give us a call.** Call us at (414) 390-5700 to pay your pledge over the phone.
- You can also schedule credit card payments with a staff member or online at MilwaukeeJewish.org/Give.
- **Pay online** anytime at MilwaukeeJewish.org/Give.
- **Payroll deduction.** Have your company's payroll department call our Business Services department at (414) 390-5700 and we will be happy to set up this easy payment method. If your company already has paperwork for payroll deduction, send the paperwork to the address above.
- **Use a Donor Advised Fund.** Many donors have a donor advised fund at the Jewish Community Foundation from which they recommend a distribution to the Federation. Donors should contact Caren Goldberg at careng@milwaukeejewish.org or (414) 390-5737.

MAKING THE CASE FOR GIVING

Following are suggestions to help you share with your donors the most compelling reasons for giving, along with facts and figures to help you make the case.

Why give?

Give because our community agencies depend on the millions of dollars the Federation provides each year to cover basic operating expenses. Give because the Federation provides vital programs and services that serve and build our community. And give because the Federation makes an impact on the Jewish community in a way that no other organization can:

- Only the Federation can help meet the needs of Jews in 70 countries around the world as well as Jews next door.
- Only the Federation has developed deep and broad relationships throughout the religious, civic and law enforcement communities to help local Jewry every day and during times of crisis.
- Only the Federation can finance and maintain seven properties for the benefit of our community, properties that provide housing to low income seniors and individuals with disabilities, as well as properties that house many of our local Jewish agencies.
- Only the Federation can unite our diverse community around Israel.
- Only the Federation can speak with a single united voice in the greater community.
- Only the Federation can educate teachers in schools and synagogues regardless of religious observance.
- Only the Federation can quickly raise and distribute hundreds of thousands of dollars when Jews face crises overseas or in Israel.
- Only the Federation can give Milwaukee Jewry a voice in national and international conversations.
- Only the Federation can secure planned gifts and investments for the community to ensure that we have the financial resources to meet our needs in the future.
- Only the Federation can help ensure that the widest array of agencies and programs will still be serving our community years into the future.

Each generation of Jews has the blessing and responsibility of doing its part to ensure the future of our people. The Milwaukee Jewish Federation represents our community's collective commitment to this future. No gift has a greater impact on the present and future of the Jewish community than a gift to the Federation.

How Annual Campaign dollars were distributed in 2013-2014

	Annual Campaign Allocation
BBYO – Wisconsin Region	\$ 60,832
Harry & Rose Samson Family Jewish Community Center	876,960
Hillel Foundation – University of Wisconsin (Madison)	50,400
Hillel Milwaukee	105,446
Jewish Beginnings Lubavitch Preschool	82,599
Jewish Family Services	441,285
Jewish Home & Care Center	18,104
Milwaukee Jewish Day School	442,921
The Academy (Hillel)	193,216
Yeshiva Elementary School	93,493
Subtotal - Local Beneficiary	2,365,256
Interfaith Conference of Greater Milwaukee	9,000
Subtotal - Other Local	9,000
Jewish Federations of North America	1,816,877
American Jewish Joint Distribution Committee	
Jewish Agency for Israel	
Subtotal - National & Overseas	1,816,877
Coalition for Jewish Learning	123,094
Israel Center	175,137
Jewish Museum Milwaukee	74,916
Nathan and Esther Pelz Holocaust Education Resource Center	17,906
Operations	1,489,641
Jewish Community Foundation	
Jewish Community Relations Council	
The Wisconsin Jewish Chronicle	
Subtotal - Milwaukee Jewish Federation	1,880,694
Grand Total	\$ 6,071,827



BEYOND THE ANNUAL CAMPAIGN

Expand your donor conversations beyond the Annual Campaign by sharing with them an opportunity to make a broad and lasting philanthropic impact.

Legacy Gifts

Many of our loyal donors would be very happy to perpetuate their support of the Jewish community and the Federation after they are gone. We just need to ask them and explain how this is an option for everyone, no matter how large or small a gift someone wishes to make.

Why should someone leave MJF an after-lifetime gift?

Many of our donors believe in the importance of communal giving through the Federation. Leaving an after-lifetime gift to the Federation—either a specific amount or a percentage of their estate or an IRA or another asset—perpetuates forever their support of the needs of the Milwaukee Jewish community.

Isn't that only for someone really wealthy?

Actually, longtime smaller givers are often the most common type of donor who leaves money to an organization after they are gone.

What is the "Create a Jewish Legacy" program?

Create a Jewish Legacy is a community-wide initiative sponsored by the Jewish Community Foundation of the Milwaukee Jewish Federation to help our local organizations secure legacy commitments from donors. There are 16 local organizations, schools and agencies participating in this program. Simply mention a very exciting community initiative to help secure the financial future of the Jewish community and tell them about Create a Jewish Legacy.

What comes next if they are interested?

Let the donor know that you will inform the staff at MJF. Caren Goldberg, the Executive Director of the Jewish Community Foundation, or another staff member will be in touch with them to provide more details and answer any questions.

education and awareness to the local community. Even with this change, 30% of the dollars raised through the campaign goes to Israel and overseas for ongoing support. And, when Israel is in crisis, we respond with emergency support. We raised nearly \$300,000 for the recent crisis.



◆ ***My own financial situation isn't great, and I can't give an increase.***

I'm sorry to hear this. It's a very challenging time for many of our donors. Whatever amount you are able to give is extremely helpful and appreciated.

◆ ***My own financial situation isn't great, and I don't think I can make a gift this year.***

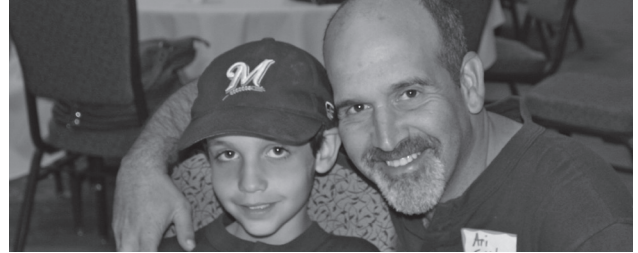
I'm sorry to hear that, you've been a very generous donor for many years, and we are grateful for your past support. I hope that circumstances improve for you.

◆ ***I have a home in another community, and I prefer to give my gift to the Federation there.***

I understand your desire to support the Federation in your new community and encourage you to do so. I hope you will also continue giving to the Milwaukee Jewish Federation. We hope you feel a special connection to our community — where you raised your family, built your business and enjoyed the strength of our thriving Jewish community — a community that you and your peers helped build. I hope this connection will inspire you to continue supporting the Milwaukee Jewish community.

◆ ***I had a bad experience with the Milwaukee Jewish Federation and refuse to support the organization.***

I am so sorry to hear that you had a bad experience. Please tell me about it.



Annual Campaign is only part of the story

The Annual Campaign is only part of the story of an extraordinarily generous community that enabled the Federation to distribute a total of \$20 million to nonprofit organizations in 2013-2014.

Annual Campaign Allocations

\$6,071,827

Jewish Community Foundation Grants & Distributions

\$11,636,472

Other*

\$2,561,639

*Other support includes the costs of managing, maintaining and financing seven properties for the benefit of our community.

SOLICITATION GUIDE

Getting Started

- Review the information on your donor cards. Learn the giving histories and other important facts about your donors.
- Based on giving history, determine how much you plan to ask the donor to give. Please encourage donors to consider an increased gift of 10% this year.
- The most effective method of solicitation is a face-to-face visit at a time and place convenient for the donor. Some donors prefer to meet for coffee or a meal and others prefer meeting in their office. Be responsive to the donor's preference.
- Setting up an appointment usually happens by phone or email, and you will likely need to be persistent to secure a face-to-face visit.
- The donor card usually lists a preferred phone number, which you should try first.
- When you approach the donor please let them know that:
 - * You would like to get together to learn about the donor's interests and talk about his/her gift to the 2015 Annual Campaign.
 - * You are interested in the donor's feedback regarding the Federation and its partner agencies.



During the Solicitation

- Be sure to make this a real conversation with plenty of listening. Try to draw out the donor, particularly his or her passions and concerns. Please let the staff or your Team Leader know what you learn.
- If a donor is upset with the Federation or one of our programs or agencies, or with a recent funding cut, be empathetic, jot down notes about their concerns, and tell them you will follow up. Contact your Team Leader or Federation staff as soon as possible.
- When the time feels right, ask your donor, "Would you consider a gift of \$XXX to the 2015 Annual Campaign?"

"The Close"

- Thank the donor and confirm the gift amount.
- If this is a face-to-face solicitation, ask the donor to sign the donor card.
- Ask how the donor would like to pay.
- Verify the accuracy of the information on the donor card. Ask the donor to provide any missing information, such as an email address or seasonal address...

After the Solicitation

- Make any notes from your solicitation on the back of the donor card.
- Submit donor commitment and any other information to MJF:
 - Contact Shelly M. Sampon, Campaign Manager at (414) 390-5723 or shellys@milwaukeejewish.org
 - Mail the card to MJF
- Follow up with a short, handwritten note or an e-mail to the donor thanking them for their gift.
- Donors will receive a thank you note from the Campaign Chairs.

Overcoming Objections

Begin your response to an objection by saying, "I understand how you feel. Thank you for sharing your thoughts with me."

◆ *I prefer to give directly to other Jewish causes (or to a particular Federation partner agency).*

We encourage our donors to support the individual organizations that are meaningful to them. A gift to the Federation supports more than any specific agency. It's about the Jewish community as a whole, and ensuring that it's healthy and strong today and tomorrow.

Our campaign tagline is "No gift touches more lives." This isn't just a slogan. Federated giving allows you to make a single gift that sustains Jewish life locally and in 70 countries around the world. A single gift helps ensure that our community will always have a full array of the programs and services that sustain and nurture Jewish life.

◆ *I don't give to the Federation because I don't want my money going to XYZ agency.*

I understand your concern. It's important to know that a gift to the Federation is about supporting our community's needs with a full array of the programs and services that sustain and nurture many facets of Jewish life.

◆ *Put me down for the same gift as last year.*

Thank you. We are so grateful for your continued support. The Federation depends on our loyal donors like you to ensure that we have stable funding for the community. Since the cost of providing services increases every year, I would appreciate your considering even a small increase of (\$18, \$50, \$180 etc.), which would make a difference. Small increases from many donors add up to a significant increase in support for the services our community depends on.

◆ *I don't want my money going to Israel because I don't like the government.*

Please know that your gift does not go to support the government of Israel. It supports individual Israelis. For example, your money helps purchase crisis medical equipment, repair dilapidated bomb shelters and provide emergency support for families affected by rocket attacks.

• *I'm angry that you're giving less money to Israel.*

I understand. This was a very difficult decision, but the Israel and Overseas committee and the Board felt that keeping more resources local would help provide more adequately for needs here in Milwaukee. This includes increased local programming that will help bring Israel