



Rise to the Challenge

SOLICITATION 101

The right mindset: Thank the donor for doing this work

1. You are inviting the donor to do a mitzvah; giving is an expression of people's values.
2. The donor is helping people who are hungry, poor, or otherwise in critical need.
3. The donor is helping create a strong and vibrant Jewish Milwaukeee.
4. The donor is ensuring the strength and quality of Jewish life in Milwaukee, Israel, and around the world.

Learn their story and make it social

1. Review their giving history and involvement in the community.
2. A face-to-face conversation is ideal. With COVID-19, consider a zoom or a socially distant get-together. Be sure to ask about your donor's comfort level.
3. Ask open-ended questions (the conversation ideally is 80% listening and 20% talking):
 - "When did you make your first gift and how did it make you feel?"
 - Tell your own story or share an impact story.
 - Educate your prospect about Federation and find out what matters most to them.
4. Create urgency: Why now? What will the funds allow the Federation to do?
 - Your gift makes our community a better place to live by funding essential programs to meet critical needs for hundreds of thousands of people in Milwaukee, Israel, and overseas.

- You will help the vulnerable, including those impacted by COVID-19. Did you know 28% of Jewish households have insufficient savings for three months and 17% of Jewish households include someone with a chronic health issue, disability, or special need?
- You will energize and protect Jewish life. You strengthen Jewish identity, community, and connection to Israel.
- You will fight antisemitism and pursue justice for all.

Making the ask

1. Know the ask amount before the meeting.
2. Make sure the decision-maker is at the meeting.
3. Thank them for their past support and for meeting with you.
4. After presenting the case to give, say: "I hope you will join me in supporting this important work. Would you consider making a gift of \$XYZ?"
5. Once you have asked for the amount, *remain silent*. The next words must be those of the donor. If the donor says no, ask for a different amount.
6. Thank them for their gift and their time.
7. Share this information with the Federation team who will process the gift.

For Donors Who Are 70 ½ Years Old and Older

1. If donors have an IRA and are over 70 ½, they can make a tax-free gift to charity. At 72 years old, people are required to take a minimum distribution from their IRA, which is taxable unless given to charity.
2. Interested donors interested should contact their IRA administrator.

Overcoming Objections

1. Listen, and don't worry if you don't have all the answers.
 - Validate and acknowledge their opinions/feelings.
 - Tell them if you don't know the answers and ask if a Federation professional can give them a call or meet with them to discuss the concern.

2. If a donor only wants to make a restricted gift, make the case for collective giving:
 - The Federation considers the needs of the whole community.
 - Federation tackles the big challenges facing our community and identifies big opportunities by deploying the right resources to the areas of greatest need. (If not for the Federation, who would be addressing the pandemic in our local Jewish community?)
 - With our partners, we catalyze the collective power of the community by mobilizing social service agencies, governments, businesses, private foundations, and donors towards effective action. We raise dollars, allocate millions, and run critical programs. We align community strategies and resources.
 - The way we allocate campaign funds is known as high impact giving. Our dedicated volunteers—approximately 90 every year—do the research, hold the vision, and then allocate your gift wisely.
3. If the donor does not want to give to the Annual Campaign, or does not want to make an increase, ask them to give to The Fund for Jewish Milwaukee for addressing the pandemic.
4. If a donor wants to give only locally or only overseas, emphasize the impact of the work they care most about.