



2021  
Annual Campaign  
**MILWAUKEE**  
JEWISH FEDERATION

## Rise to the Challenge

### TALKING POINTS

#### ANNUAL CAMPAIGN

In typical years...

- Our partner agencies depend on Annual Campaign dollars (\$6.5 million) to help sustain their operations.
- “Depend on” means the funds are consistently incorporated into their annual budgets. If the dollars are not there, they cannot pay their bills.
- These are the most valuable dollars to our agencies because they are unrestricted, allowing agencies to apply them to their greatest needs.

With COVID-19...

- To varying degrees, each of our partner agencies has suffered lost revenue (membership, fundraising events, tuition payments, program fees, etc.)
- Now they need more than what we give them in typical years.
- Why give a two-year Campaign gift? We want to help our agencies forecast their next 24 months.

#### THE FUND FOR JEWISH MILWAUKEE

- MJF is the center for Jewish philanthropy in Milwaukee: raising funds to address the pandemic is our responsibility.
- This \$3 million fundraising campaign supports all local Jewish organizations including synagogues and non-constituent agencies.
- The Annual Campaign pays for regular operations of our agencies. The Fund complements dollars to our agencies by paying for pandemic-related needs.
- The Fund is administered by a committee of our most seasoned volunteers and donors, chaired by Joan Lubar and Sara Hermanoff.
- We are approaching the pandemic in three stages:

- Respond: This was a rapid response stage during the first weeks of the pandemic.
- Recovery: This occurred over the summer when we assisted organizations in planning to adapt and reopen safely.
- Rebuild: We are working with local Jewish organizations to help them adapt their business models to ensure that they remain viable and are positioned to thrive when we emerge from this time.

- Matching grant program
  - Through December 2020, every eligible dollar given to The Fund for Jewish Milwaukee will be matched by 50% by Jewish Federations of North America.
  - What's an eligible dollar? Donations to The Fund that exceed last year's Annual Campaign gifts or gifts to The Fund from a donor who has not given to the Annual Campaign for the last 18 months or more.

## LEGACY GIVING

- Many donors have invested in our Annual Campaign for decades and don't like the idea of their annual gift ending with their lifetimes.
- 17% of our Annual Campaign (over \$1 million) comes from people who endowed their gifts.
- Endowments are funds that can permanently sustain something important to you, in this case the Federation and the causes it supports.
- Only a percentage of the fund balance is given away each year so, with a sufficient investment, an endowment ensures a donor's annual support for our community will continue forever in its entirety.
- For example, many women choose to endow their annual Lion of Judah gift of \$5,000 or more with a Lion of Judah Endowment, which begins with an endowment gift of \$118,000.
- Most endowments are planned gifts that will be funded using future dollars – such as dollars from retirement funds, a bequest in a will, or insurance.