



Jewish Philanthropy 101

Jewish Perspectives on Asking, Giving & Leading

LIFE & LEGACY / Create a Jewish Legacy Leadership Gathering

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Monday, May 18, 2020, 4:00 PM CDT

Session Goals

- Examine legacy giving as a reflection of personal values & identity
- Practice articulating your own commitment to giving
- Explore “asking” as means to connecting to a Jewish story
- Connect your work to Jewish texts on giving, asking & leading

Giving as a Reflection of Jewish Values & Identity

01

Is your tzedakah a reflection of your Jewish identity? Your values? Why or why not?

02


Name the most meaningful gift you ever made and why it was so meaningful.

03

What was the most meaningful gift you ever received and why?

04

If you were asked to describe the essence of your organization's work via one story, what would it be?



Tzedakah as a Core Jewish Value

1

"Tzedakah and acts of kindness are the equivalent of all the mitzvot of the Torah." –

Jerusalem Talmud, Pe'ah 1:1

2

"Tzedakah(charity) is equal to all the other commandments combined." Talmud (Baba Batra 9a)

3

"Greater is tzedakah than all the sacrifices." –

Talmud, Sukkah 49b

4

"Great is tzedakah, for since the day that the world was created until this day the world stands upon tzedakah."

Midrash Tanna d'Vei Eliyahu Zutta 1

Jewish Giving in the U.S.A.

Jews as the most generous Americans

- Most give to causes that are not related to their faith
- 76% reported making a gift last year (as opposed to 63% of non-Jews)

Even households <\$50k give

- 60% of Jewish households making less than \$50k give vs. 46% of non-Jewish

Jews support social service

- 54% of Jews more likely to give to social service orgs than congregations, compared to 41% of non-Jews
- 92% of Jews give to non-Jewish causes, 79% to Jewish orgs

Engagement = giving

- Jews involved in Jewish causes are much more likely to support both Jewish & secular charities
- 90% of those who are “highly” involved give to both, vs. 58% of those who report “very low” involvement give to any charity

What's Jewish About Asking?

- “He who causes others to do good is greater than the doer.”
- “And the work of righteousness [*tzedakah*] shall be peace, and the effect of righteousness quiet and confidence forever.”
- “Those who are wise will shine as bright as the sky, and those who lead many to righteousness will shine like the stars forever.”



Naming Our
Discomforts:
Greatest Fears in
Fundraising

Greatest Fears in Legacy Asking

- Talking about “death”
- Lack of knowledge
- Abusing the relationship
- Asking for a favor
- Asking for *too much*
- Failure/rejection
- Weak case

Motivations for Legacy Giving

- They've been asked
- Strong belief in the mission or project
- Desire to leave a legacy; continue building community
- Public recognition/desire to be immortalized
- Sense of community and/or communal responsibility
- Respect for the solicitor
- Family engagement
- Emotional reward
- Fulfillment of philanthropic goals

“Matterness”

Isaiah 58:7,10

"Is it not to divide your bread with the hungry and bring the homeless poor into the house; when you see the naked, to cover him; And not to hide yourself from your own flesh? And if you give yourself to the hungry and satisfy the desire of the afflicted, then your light will rise in darkness and your gloom will become like midday."

01

Think of a time (outside of work) when you felt you mattered. Where were you? What were you doing ?

02

Did you receive a reward, honor or some form of recognition?



Inspired
Leadership

“And I heard the voice of the Lord, saying: Whom shall I send, and who will go for us? Then I said: 'Here am I. Send me.'” Isaiah 6:8

Opportunities in Legacy Building

- Maximize donor relationships
- Engage generations of donors
- Gain a long-term planning perspective
- Focus the org, board, donors on need for long-term sustainability
- Increase donor options with current and deferred gift menu
- Conversations strengthen and reinforce donor relationships



The Life Cycle of a Donor



Major Gift Prospects

KEY DONOR QUALITIES

A

**Ability to make
a meaningful
gift**

B

**Belief in the
mission**

C

**Connection
within the
organization**



Donor Engagement Pyramid

Legacy/Endowment Donor

Major Donor

Committed Donor

Occasional Donor

First-Time Donor

Prospective Donor

Moves Management: Moves You Can Use

(E)MAIL

with a personal note:

- Articles
- Video
- Photos
- Annual report
- Books
- Newsletters
- Resources
- Holiday cards

MEET

- CEO/ED/Board President
- Members
- Students/Alumni
- Key donors
- Board members
- Committee leadership

INVITE

them to join you for:

- Shabbat dinner or lunch
- Lectures and/or cultural events
- Golf or tennis
- Community event/performance
- Donor recognition events

EXPERIENCE

- Tour the facility
- Shabbaton
- Committee/board meeting
- Annual meeting
- Tikkun olam event
- Class or program



Soliciting in a Time of COVID-19

- Compassion is heightened
- Your donors are at home and on-line
- How has your work shifted?
- Consider what hasn't changed



Getting Comfortable In Your Discomfort

The Unapologetic Ask

- Your work continues
 - They want it to
 - So, ask for help



Thank you!

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