



# What Motivates Charitable Giving and Successful Donor Engagement

**Presented by Jenni Frumer, PhD & Allison Steinberg**

Network of Jewish Human Service Agencies Conference 2018

# SPEAKERS

## **Jenni Frumer, PhD**

Jenni Frumer is the CEO at Alpert Jewish Family & Children's Service in West Palm Beach, Florida. PhD in Human Capital Management from the College of Business at Bellevue University, Nebraska. Graduate of both the Wexner Leadership Training program and the Alliance for Families and Strong Communities, Executive Leadership Institute (ELI) at the University of Michigan. Team Leader and is on the Board of the national Council on Accreditation (COA).

## **Allison Steinberg**

Allison Steinberg is the Director, Development at JVS Toronto. With a communications background, her career has been focused on fundraising, communications and program development. At JVS Toronto she has developed and implemented a fundraising strategy that moved the Agency away from large events, and focuses on building and maintaining a strong and dedicated donor base.

# INTRODUCTION



Alpert Jewish Family & Children's Service

Established in 1974

Over 200 employees

\$13MM budget

Fundraising: \$2.8MM from \$480K in 2010

Events

Chai Society – more than 50% of contributions

Focus on engagement and retention



# STUDY

- ▶ Qualitative Phenomenological Research Study
- ▶ Identify motivations of donors giving time and money to JFS organizations
- ▶ Added insight into the growing body of philanthropic research on understanding of donor-level giving to Jewish faith-based nonprofit human service organizations
- ▶ Fundraising professionals at JFSs across the country will be more informed about how to create value in the donor-organizational relationship that encourages charitable giving

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**1.**

**BECOMING A  
PHILANTHROPIST**



# Findings

- ▶ Begins when they are young
- ▶ Learn philanthropy from family
- ▶ Associate with Jewish Heritage
- ▶ Sense of obligation and collective responsibility
- ▶ Subtheme 1A: What it means to be philanthropic
  - ▶ Extension of their identity
  - ▶ Make a difference and/or honour family

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**2.**

**PERSONAL  
REASON FOR  
SUPPORTING A  
SPECIFIC  
ORGANIZATION**



# Findings

- ▶ Difference in their lives or the lives of people they know
- ▶ Can rely on the organization for support
- ▶ Can reach out in a personal manner to find help for others



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**3.**

**CONNECTION TO  
RECIPIENT OF  
SERVICE**



# Findings

- ▶ See how their donations helped
- ▶ Specific stories of individuals helped
- ▶ Concrete outcomes increased desire to support

**4.**

**PRIDE AND  
LOYALTY HELPS  
ME MEET MY  
IDEAS OF  
OBLIGATION**



# Findings

- ▶ Pleased to know the organization is accountable to them
- ▶ Ownership and sense of belonging
- ▶ Echo their personal beliefs and values
- ▶ Subtheme 4A: The concept of loyalty
  - ▶ “loyalty is not blind”
  - ▶ Agency’s responsibility to show loyalty to donors

# 5.

BEING  
CONNECTED TO  
AN ORGANIZATION  
HELPS MAKE A  
DIFFERENCE



# Findings

- ▶ Obligation to help community
- ▶ Philanthropy is their way of making a difference
- ▶ Ability to effect change



# REFLECTIONS & RECOMMENDATIONS

1. **Educate**
2. **Connect**
3. **Infuse Credibility**
4. **Share**
5. **Solidify Partnerships**



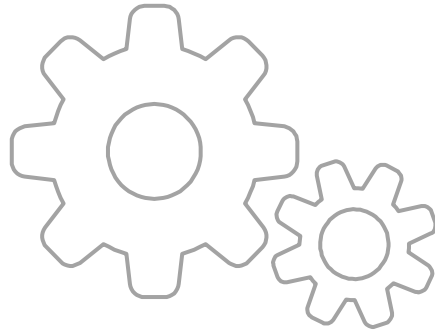
# Introduction to JVS Toronto

- ▶ Agency Budget over \$16M
- ▶ Funded by 3 levels of government, UJA Federation & United Way
- ▶ Annual Fundraising Target of \$300K
- ▶ For 15 years held keynote event which formed the basis of FR strategy for the organization
- ▶ In 2015, made the strategic decision to move away from large events and focus on donor engagement and long-term sustainability.



# JVS Toronto's Key Fundraising Activities in 2018:

- ▶ Annual campaign
- ▶ Targeted approach to foundations and major gifts
- ▶ Intimate donor stewardship events



# Theme 1: Becoming a Philanthropist

- ▶ Celebrated 70<sup>th</sup> anniversary at our AGM
- ▶ Family funds motivate donors while keeping the family engaged through annual fund allocation
- ▶ Tribute card program helps families feel connected to the agency and provides opportunities to grow our donor list
- ▶ Pay tribute at our AGM to supporters and friends of the agency that have passed



AGM 2017 Seven Decades Presentation Guest Speakers

**37%**

AGM Attendance  
Increase

**19%**

Increase in dollars raised  
for family funds

**142**

New Donors



**Results**

# Theme 2: Personal Reason for Supporting a Specific Organization

- ▶ Major gift secured from past staff member
- ▶ Board members act as ambassadors for the agency and inspire trust
- ▶ Mother of JVS client offered perspective that donors could relate to
- ▶ Client spoke to major donors at a small intimate reception and interacted with attendees on a personal level



**Every individual deserves belonging and inclusion.**



## **Who would you turn to for support for your adult child with special needs?**

Mary, a retired teacher with grown children, devotes her time to singing in a senior's choir. Like some families her youngest still lives at home. Mary's deepest wish is self-sufficiency for her son, Adrien. This independence looks quite different from that of other adult children.

**Adrien, 37, lives with a developmental disability and is deaf.**

Fall 2017 Annual Campaign Mailer

**35%**

Return on Board Signed  
Letters

**80%**

Increase in Dollars  
Raised

**32%**

Donors increased  
Gift Amount



**Results**

# Theme 3: Connection to Recipient of Service

- ▶ Clients write thank you cards and personalized letters to donors
- ▶ Donors come in for site visits and have the opportunity to interact with clients, witness their participation in JVS programs
- ▶ Hosted grand opening of newly renovated space and gave clients and donors opportunity to interact
- ▶ United Way Days of Caring Event to demonstrate need in the community



Dear Foundation Board of Directors,

My name is Gloria and I am writing to you in regards to your support of the Toronto Youth Job Corps (TYJC) program at JVS Toronto. I have included a bit about myself and how much I have grown as a result of this program.

Before joining JVS, I was unemployed and out of school, only able to do odd jobs which wasn't happening frequently. I got referred into the program and I'm grateful for this opportunity. I had low self-esteem in finding employment, because of the huge gaps in my resume. There was difficulty transitioning to the job market from a stay home mom. I needed the assistance of JVS to be able to boost my confidence, assist in updating my resume and also to help me become job ready.

TYJC provided me with the skills I needed to succeed in the workforce, and gave me training and certifications that have been so important. The program also gave me invaluable financial knowledge. I learned about doing taxes and saving, which I was not taught growing up. I got to network with friendly and supportive staff, partnering organizations and built lasting friendships with the other participants who attended the program. The staff helped me access a placement I love, and that has been opening more doors.

I appreciate what TYJC has done for me and for others that have attended the program. I've seen how much the staff cares and has supported my career path. They acknowledged all my talents and guided me on how to incorporate them into my resume. I will definitely recommend this program to my friends and anyone who would benefit from it.

Thank you for your contributions and I hope this program can continue to make a difference in the community and help others the way I have been helped.

Sincerely,

Gloria

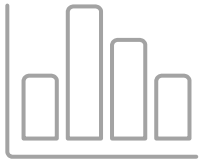
Thank You Letter from a JVS Toronto Youth Client



AI Green Resource Centre Grand Opening 2017

# 5 years

Length of pledge increase by  
Foundation following a site visit



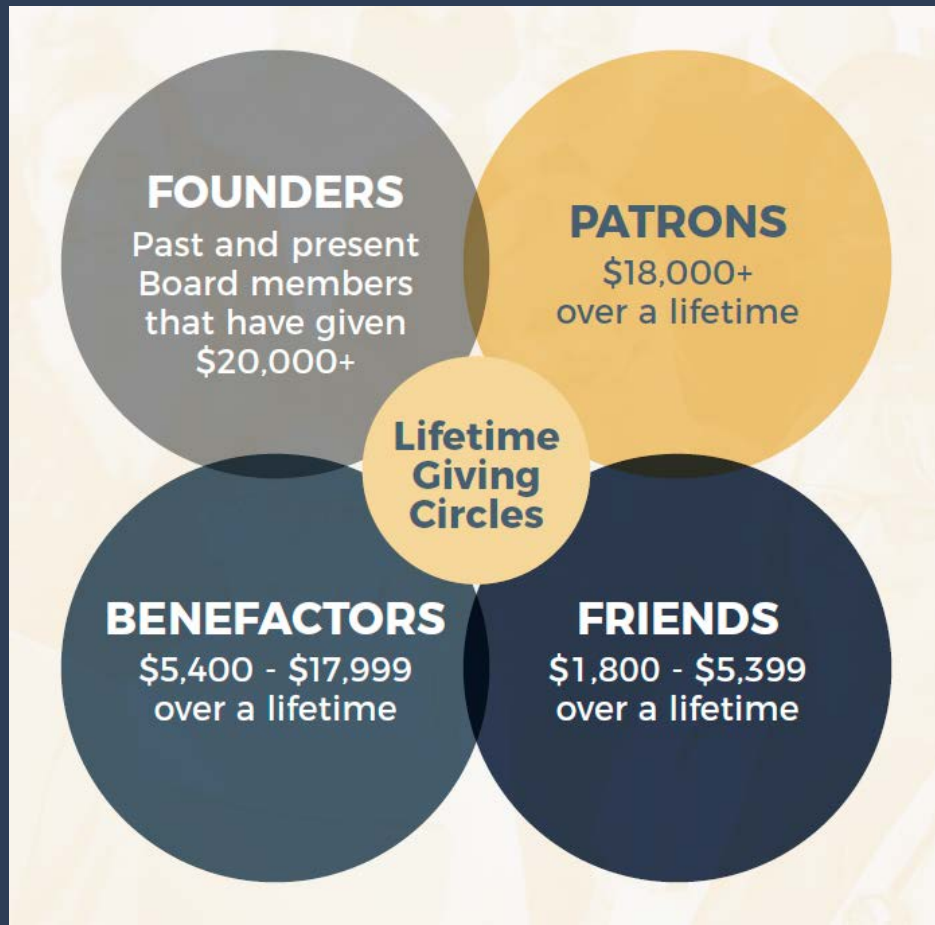
## Results

# Theme 4: Pride and Loyalty Helps me Meet My Ideas of Obligation

- ▶ Reengaged a corporate donor through anniversary sponsorship
- ▶ Introduced Lifetime Giving Recognition Program and installed a donor wall
- ▶ Implemented a new donor database



Our 70<sup>th</sup> Anniversary sponsor at the 2017 AGM



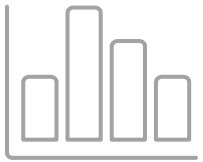
Lifetime Giving Program Recognition Circles

350

Individuals and  
Organizations will be  
Recognized on our  
Donor Wall

1

New Major Gift  
Secured as a Result of  
the Recognition  
Program



**Results**

# Theme 5: Being Connected to an Organization Helps Make a Difference

- ▶ Employment as a cause can be a hard sell
- ▶ Showcase how we advance poverty reduction goals in our community



**BEFORE**

**AFTER**

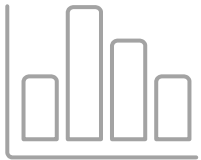


Dearest Karin,  
Thank you for being there when I came  
crashing down. I've found my wings and  
I'm flying off, but you haven't heard the  
last of me! I will be in touch.

Big Hug,  
Neesha

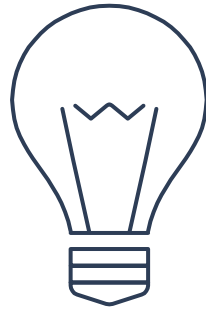
# 87%

Increase in Dollars Raised through  
Direct Mail After Making a direct link  
between employment and Poverty  
Reduction



## Results

Let's brainstorm!



# Thank you!

## Any questions?

You can contact us at:

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**[asteinberg@jvstoronto.org](mailto:asteinberg@jvstoronto.org)**