



Breakdown of Lifetime Giving Recognition

The following demonstrates a detailed breakdown of the recognition levels that appear on our Donor Wall:

Lifetime Giving Recognition

Founder's Circle: all past board members that have given \$20,000 and above

Patrons (\$18,000 - \$200,000+)

- \$200,000+
- \$100,000 - \$199,999
- \$50,000 - \$99,999
- \$25,000 - \$49,999
- \$18,000 - \$24,999

Benefactors (\$5,600 - \$17,999)

- \$10,000 - \$17,999
- \$5,400 - \$9,999

Friends (\$1,800 - \$5,399)

- \$3,600 - \$5,399
- \$1,800 - \$3,599

Recognizing your generosity.

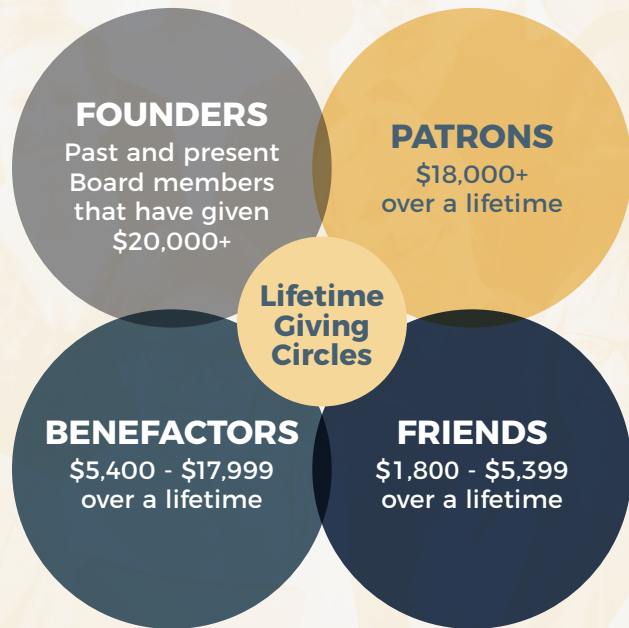
As a token of gratitude for lifetime giving, we recognize donors within Lifetime Giving Circles by displaying their names on our Donor Wall, in our Annual Report, and on our website.

Planned Giving and yearly contributions of \$100 or more are also recognized in our Annual Report and on our website.

For more information on Lifetime Giving Circles or Planned Giving, please call 416 649-1631.



Thank you for supporting our vision that every individual has opportunities for employment.



Donate today. Give the power of employment.

Your donations support the vital work we do throughout Toronto and York Region.
Ongoing monthly and multi-year gifts make the greatest impact on the fight against unemployment.

I commit to a donation of: \$50 \$100 \$250 \$500 Other: _____

My donation will be paid: monthly annually one-time Other: _____

My cheque/payment details are enclosed/included below. My first payment will be made on:

I would like to be contacted to discuss payment. _____
DD/MM/YYYY

Apply my donation: to where it's most needed to a specific area _____

I prefer to pay by: MasterCard Visa AMEX Cheque (enclosed)

Card #

--	--	--	--	--	--	--	--	--	--

--	--	--	--	--	--	--	--

--	--	--	--	--	--	--	--

--	--	--	--	--	--	--	--

--	--	--	--	--	--	--	--

 Security #

Cardholder Name _____ Signature _____

Expiry Date _____
MM/YYYY



Name _____

Address _____

Phone _____

Email _____

Donations can also be made at
www.jvstoronto.org/donate

All donations \$18 or more are eligible for a charitable tax receipt.
Registered Charitable Organization 10753-5015-RR-0001

What Motivates Charitable Giving and Successful Donor Engagement
NJHSA Conference Presentation
by Jenni Frumer and Allison Steinberg
April 2018

The following is a list of ideas generated by session participants in the “*What Motivates Charitable Giving and Successful Donor Engagement*” breakout/brainstorming session. Participants were divided into groups based on the 5 themes from the qualitative dissertation study. They were given 15 minutes to share/brainstorm ideas, and then were asked to report out on their discussions.

5 themes from qualitative Dissertation study (2017):

1. Becoming a Philanthropist
2. Personal Reasons for Supporting an Organization
3. Connection to Recipient of Service
4. Pride and Loyalty helps Me Meet My Obligations
5. Being Connected to an Organization Helps Me Make a Difference

General Ideas and Feedback from Participants:

- Make placards to put as centerpieces with pictures of individuals who have been helped (not actual person) with story
- Encouraging young leadership by having selective process (Dallas Federation did this)
- A young leadership Board (21-35 yrs. old) with an initiative (bring supplies for schools) who eventually become future Board members on regular Board.
- Donors like to see gratitude or read gratitude.
- Client contact can be difficult.
- Food Pantry – client choice for gifts.
- Post-it notes collage of client thank-you quotes.
- Make donors part of change when changing focus of programs (overcoming change & staying relevant)
- Ask donors who reduced gifts why they did so
- For endowment funds, continue to remember grants by donors even when not required by fund document (encourages them to continue to grow fund)
- Connect the donor to the specific program/service (their particular interest)
- All staff meeting – contribute stories of impact
 - “What have you done this week that you are proud of?”
- Naming for space in building – leave a legacy
- Make cards with stories → send them out as a thank you/ask – all the Board Members, stop in the middle of the meeting to sign the cards (social/snacks)
- Smaller engagements to experience the work
- Board members calling to say thank you

- Parlor meetings around topics (no solicitation)
- Millennials
- Bar & Bat Mitzvah age – allocate funds from gifts
- Internships
- Adopt a family during Chanukah
- Young families & young children deliver Passover “hampers”
- Children as young Hanukah gift wrappers for Hanukah gifts for needy kids
- Invite donors to graduation of training programs!
- Scholarships to Jewish youth graduating high school for post-secondary
- Personalized thank you letter to donor sharing the impact of their gift.
- Special funds for donors to give to
- Impact stories – “I don’t care about statistics. I care about the single person...”
- Annual report full of impact stories
- Many letters regard impact
- Blog posts with individual stories
- Might be a thank you letter
- \$ Amount to a certain activity, i.e., Mental Health services.
- Highlighted JFCS house & 4 programs
- Might have “actors” talking about services provided
- Benevon method (Engagement)
- Problem is that it requires much work & coordination of volunteers
- Hard for small groups
- Giving circle with reports. Anonymous needs and grants, with reports of expression of gratitude from client.
- Circles targeted to a specific type of client.
- Groups of younger donors with stories unique to them
- Rebranding so services not seen as only Jewish
- Must understand what the agency/company does
- Must understand that you care about them & their own ideas – not just transactional – you engage them in ways other than taking their \$s
- Staff easier than clients – Family member of clients is good alternative
- Show/Introduce some clients who look like the donors
- Lunch & learns for donors – with staff, not clients – Lunch provided
- “Fast Facts” → Short & digestible, blips, not TMI
- Elevator pitch competition
- Board → Then created a wallet card
- Poverty simulation – Should have invited donors, not just staff

Themes: Group Report Outs

1. Becoming a Philanthropist Theme

- Young leaders Board
 - Nominated
 - Chose a specific project
 - Parents and grandparent involvement
- Engaging kids at Bar/Bat Mitzvah age
 - Donating time
- Funds to communal pot – kids can be part of allocation
- Young interns donate time over summer – engages families – parents/grandparents
- Children to deliver baskets
- Children to wrap Hanukah presents

2. Personal Reason for Supporting Organization Theme.

- Impact stories → real stories, not statistics
 - blog posts
- X # of \$'s will allow you to provide X services
- Staff representing stories @ AGM.

3. Connection to service Recipient Theme

- All staff meeting – “What are you most proud of”
- “Board meeting – everyone signs thank-you
- Parlor events around specific topics.
- Graduations → invite donors
- Scholarships to Jewish student – from high school to post-secondary.
- Personal thank-you to donors
- Impact funds – dedicated to young girls & women

4. Pride & Loyalty Help with my Obligations Theme

Donors need to understand what you do

- Create fast fact sheets
 - Lurch and learns for donors
 - Elevator pitch competition for donors
- Making donors part of change – have a voice to ensure their cause is still relevant

5. Being Connected and Making a Difference Theme

Benevon method of Fundraising.

- 1-hour event → table hosts/next year
- No charge to attend
- Table hosts
- 2/3 of guests give
- → i.e., pyramid scheme.
- \$60K – 175K through no method

Gratitude Exercises

- Read about

- Feeling gratitude.
- Convey – Client contact can be difficult
- Physical /tangible → food pantry.
- Post it collage → of thank-you



What Motivates Charitable Giving and Successful Donor Engagement

Presented by Jenni Frumer, PhD & Allison Steinberg
Network of Jewish Human Service Agencies Webinar
1/23/19

Part 2

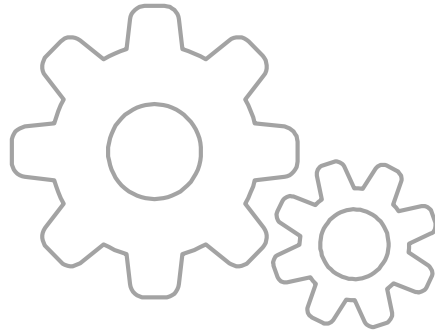


Introduction to JVS Toronto

- ▶ Agency Budget over \$16M
- ▶ Funded by 3 levels of government, UJA Federation, & United Way
- ▶ Annual Fundraising Target of \$500K
- ▶ 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 2018/19:

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

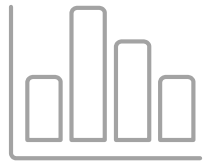


Theme 1: Becoming a Philanthropist

- ▶ Celebrated 70th 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



Results

37%

AGM attendance
increase

56%

Increase in dollars raised
for family funds

142

Individuals
added to donor
list through
memorial gifts

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
- ▶ Client spoke to major donors at a small intimate reception and interacted with attendees on a personal level
- ▶ Mother of JVS client offered perspective that donors could relate to
- ▶ In 2018 campaign focused on mental health and the impact on employment



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



Every individual deserves inclusion in the workforce.



At 64, Faith didn't think it was possible to get a job at her age.

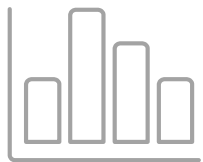
It had been 16 years since Faith had worked full-time. Formerly a nurse, Faith held senior-level positions in insurance and banking until 2002 when her depression put her in an “invisible prison.” With her long-term disability support coming to an end, Faith needed to re-enter the workforce.

She had no clear plan about what positions to seek and no idea who to turn to for help.

Fall 2018 Annual Campaign Mailer

Campaign Video

[https://youtu.be/
nxlbK8Q3SVE](https://youtu.be/nxlbK8Q3SVE)



Results

35%

Of people that received a personalized letter made a donation

80%

Increase in dollars raised

29%

Donors increased gift amount from their last direct mail gift

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



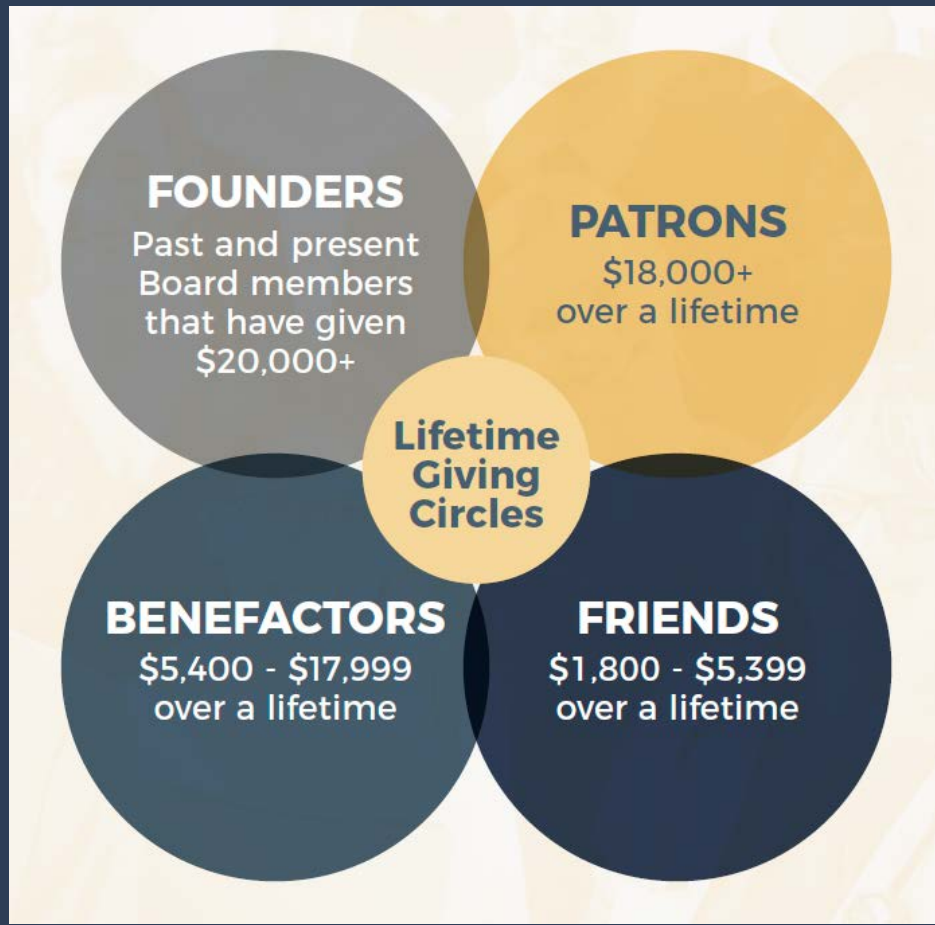
Results

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 70th Anniversary sponsor at the 2017 AGM



Lifetime Giving Program Recognition Circles

350 + 1

Individuals and organizations will be recognized on our donor wall

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

Ideas from NJHSA 2018 brainstorming session

- Engage family members of all ages (young leadership boards with a dedicated fundraising project, bar/bat-mitzvah fundraising projects)
- Share impact stories and tie the dollar amount to impact (X\$ will enable you to provide x services)
- Make connections between donors and recipients however you can (parlour events, invite donors to graduations, personal thank you to donors, create impact opportunities ie; group of women fund a project for young girls.
- Help donors understand what you do-Create fast fact sheets, lunch and learns, elevator pitch completion for donors.



Thank you!

Any questions?

You can contact us at:

jfrumer@jennifrumer.com

asteinberg@jvstoronto.org



What Motivates Charitable Giving and Successful Donor Engagement

Presented by Jenni Frumer, PhD & Allison Steinberg

Network of Jewish Human Service Agencies Webinar 1/23/19



SPEAKERS

Jenni Frumer, PhD, LCSW, MEd

Jenni Frumer is the former CEO at Alpert JFS in West Palm Beach, Florida. She has a PhD in Human Capital Management from the College of Business at Bellevue University, Nebraska. She is a 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. She is a Team Leader and is on the Board of the national Council on Accreditation (COA). She is the President of Jenni Frumer & Associates, LLC., management consultants and teaches graduate social work courses at Fordham University, public administration and business courses at Lynn University.

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



- ▶ Retired July, 2019 from Alpert Jewish Family Service
- ▶ Established in 1974
- ▶ Over 200 employees
- ▶ \$13+MM budget
- ▶ Fundraising: \$2.8MM from \$480K in 2010
- ▶ Events
- ▶ Chai Society – more than 50% of contributions
- ▶ Focus on engagement and retention



Jenni Frumer & Associates, LLC
CONSULTANTS



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



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

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

3.

CONNECTION TO RECIPIENT OF SERVICE





Findings

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



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**