

**PEARL: Providing Education and Resources for Leadership**

# **How Do We Run a Successful Congregational Fundraising Event?**

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**Jewish Reconstructionist Federation**

***Transformative Judaism for the 21st Century***

101 Greenwood Avenue

Beit Devora, Suite 430

Jenkintown, PA 19046

215.885.5601 / fax: 215.885.5603

[www.jrf.org](http://www.jrf.org)

## **Being Part of the Mitzvah: An Orientation to Raising Funds for Tzedakkah**

Barry Nove, Director of Development  
Jewish Reconstructionist Federation

Since joining the staff of the Jewish Reconstructionist Federation (JRF) in August 2006, I have learned what it means to be Reconstructionist, to not only utilize a democratic decision making process but the importance of imbuing it with solid Jewish values like *kehillah* (community), *tikkun olam* (social justice), *hokhmah* (Jewish education), and *tzedakkah*.

One former congregation president, now serving on JRF's board of directors, told me recently that it was always important to her to stress to her membership the reason supporting the synagogue through *tzedakkah* was important. She was offering them the opportunity to participate in the mitzvah, one that would help the congregation to continue and to flourish.

While speaking with leaders from affiliates across North America, I heard concerns about raising money to support their annual operations, or increase their operating capacity once they are ready to hire a full-time rabbi, Jewish educator, or administrator. JRF affiliates often receive, and count on, a great deal of in-kind help from their members, who donate time in a variety of ways, saving the congregation significant money in the process. However, even under those circumstances, raising funds on top of an affiliate dues structure is vital to the well-being, the future of the *kehillah*, the congregational community.

It is not enough to depend on volunteering or others to volunteer, when a congregation could flourish rather than simply say, "We don't want to grow or change. We like our congregation just the way it is." Just like families grow, children and parents grow older, and their needs changes, it is an illusion that a *kehillah* does not do the same.

If what's holding your "family" back from considering "sending that kid to college because you don't have the funds to make it possible," then your *kehillah* needs to think about its fundraising initiatives differently.

What has drawn many people to Reconstructionist congregations and havurot, they often tell me, is the culture. It's not like the synagogue they used to belong to, where every room had a dedication and the synagogue or temple was all about money – how much you could give them and not about being a part of the process or community. Spiritual connection is what members are finding and money, not the mitzvah of *tzedakkah*, has created a perception in some people in the Reconstructionist movement that raising money is antithetical to Torah values, which is completely untrue.

Reconstructionist congregations across North America relate to fundraising on a wide spectrum. Some congregations dedicate space through donor support, some dedicate prayer books as a fundraiser, others recognize donations in the democratically selected way they've chosen, perhaps electing to include verses of *tehillim* (psalms) on the wall rather than family names in recognition of support.

What binds all these successful fundraising techniques together is sharing the opportunity to fulfill the mitzvah of *tzedakkah* equally.

To illustrate this point, I want to conclude by adding a small bit of Jewish history and tradition. Even the poor are expected to give *tzedakkah*. One testament existing today of this is the Western Wall in Jerusalem. During the Second Temple Period, the poor donated the money for the Kehillah's Capital Campaign. Upon the destruction of the Temple by the Romans, only that wall built through the donations of those who had so little to offer, but did, who shared the opportunity to participate equally with others throughout the community, remains today.

That's the power of participating in this mitzvah. We can create a lasting testament to Jewish continuity, struggle, and evolution of Jewish civilization – all through supporting our kehillah through expressing the Jewish values we hold dear.

## **Fundraising is a Part of the Jewish Tradition and Synagogue Life**

Marla Friedenberg, Development Associate  
Jewish Reconstructionist Federation

In the Jewish tradition, charity is equated with justice and ethical conduct. In fact, the Hebrew word *tzedakkah* encompasses the notions of *justice* and *charity*. A Jew is encouraged to give out of a sense of righteousness. It is not surprising, therefore, that giving has become an integral part of modern synagogue life, enabling synagogue communities to continue to thrive and grow.

Synagogues are member-based non-profit organizations and, as such, require steady and predictable resources. Beyond dues, fundraising is the major way that synagogues can obtain the resources they will need to achieve their vision and meet their goals.

**However, synagogues are individual institutions with distinct personalities and cultures, particularly when it comes to asking.** Whatever form of fundraising is undertaken – a small or limited appeal, an annual campaign or a major capital expansion, it must work within the culture of the community in order to achieve its goals. In that way it serves the primary purpose and helps to build and advance the cohesion of the community.

### **What Motivates Successful Fundraising?**

#### **First Principles of Synagogue Fundraising**

- a. People do not give to letters, buildings, plans, or events. **They give to people.**  
The most important words in successful fundraising are **“join me.”**
- b. Fundraising is not only about the money. It is a tool for making the community better and making an impact on the lives of people.
- c. Giving is driven by charitable intent – **you need to want to give.** In fact, commitment and objective capacity to give are often inversely related.

## Conceptual Framework of Successful Fundraising

### **VISION → ORGANIZATIONAL GOALS → CASE FOR GIVING**

A synagogue's **VISION** articulates a sense of shared values and aspirations among the members of a congregation, and is based on a shared concept of what would constitute a dynamic future for the synagogue community. Vision reflects the passion, dedication, and commitment of a congregational family to look forward and strive to attain its collective dream for the future. Vision must then be translated into **ORGANIZATIONAL GOALS** for the congregation.

**VISION** encompasses the direction, scope, and nature of a synagogue's future within its personality and culture, such as:

- What are the congregation's basic principles?
- How big does a congregation want to be; how should it grow?
- What are its educational priorities?

**ORGANIZATIONAL GOALS**, the concrete expression of a synagogue community's vision, are broad and articulate the community's priorities, such as:

- Expanding administrative capability to better manage a larger and more sophisticated membership.
- Hiring additional teachers with special skills to implement a new religious school curriculum.
- Constructing a new wing to house an expanded Hebrew School.

Goals also need to be measured in dollars so that the most appropriate fundraising direction can be determined and implemented.

**VISION** and **ORGANIZATIONAL GOALS** must ultimately be converted into **FUNDRAISING OBJECTIVES** or a **CASE FOR GIVING** that reflect measurable

chunks of reality, in the form of specific activities, which will enable the synagogue to obtain the necessary funding to meet its goals.

For example, a synagogue may wish to:

- Conduct a special event, such as a concert by a leading Israeli folk singer, to raise money for its Adult Music Program.
- Assign its High Holiday appeal or ask for an expanded additional appeal to meet a short term challenge.
- Move forward with a capital campaign to fully renovate its sanctuary.

### **Supporting a Synagogue's Vision; Meeting its Needs**

Synagogues today need resources to accomplish their goals – facilities, equipment, people power, time, and, of course, money.

Money does not cure all the ills that a synagogue faces and is a means to an end, not an end in itself. A financially healthy synagogue – one that is clear about its vision, pays reasonable attention to long-term planning, and has capable and committed leaders and staff – needs money to keep existing programs running, expand and enhance programs, renovate and modernize high-use facilities, and provide for the long-term.

Each synagogue has its own culture, personality, and approach to giving, as well as a set of priorities and needs. Seeing fundraising as a tool to achieve community goals and to meet community needs will enable congregations to implement the right fundraising programs without feeling that the very nature of the community is being threatened.

When planning what type of fundraising initiative to embark upon, it is necessary to be sensitive to these needs, priorities, and personality.

## Special Events

A special event, which may be a part of an annual campaign, is a specific occasion that a synagogue plans and carries out to achieve multiple goals:

- To celebrate a milestone or community achievement,
- To gather its congregants for the specific objective of community building, and
- To obtain funds.

More often than not, a special event reflects the uniqueness of the sponsoring synagogue. Pulling together a successful event requires a great deal of volunteer work and investment of time.

In addition, some special events require an initial financial investment before realizing any income. For these reasons, the *return-on-investment*, when calculating volunteer and staff time and materials, can be relatively low and should be carefully considered.

Some of the important questions that you, as a synagogue leader, should ask before considering running a special event include:

- Is the prospective special event compatible with the synagogue's mission and vision?
- Other than money, are there measurable benefits to your synagogue in running this special event?
- Is the amount of staff, volunteer, and leadership investment in producing this special event commensurate with the expected economic and other returns?
- Are the income projections of special events at your synagogue usually met?

### **When to Consider Using a Consultant**

Fundraising consultants can be helpful partners with synagogue leadership in planning, preparing, and implementing stages of a major campaign. It is generally recommended

that a synagogue consider using a fundraising consultant only if they contemplate embarking on a campaign of a minimum of \$1 million.

The value that a consultant might bring to a campaign could include the following:

- Based on their years of experience, a consultant can give you an adequate read on whether or not your synagogue is ready and able to carry out a successful campaign.
- Consultants will create a total campaign strategy for the synagogue that maps out a target goal, potential gift range chart, campaign timetable, campaign approaches, and procedures to maximize campaign success within the persona of the congregation. In doing so, consultants may often prevent the synagogue from making costly mistakes that would need to be undone throughout the campaign process.
- Consultants watch over the entire campaign activity, giving direction and making certain that plans are carried out, deadlines are met, activities occur, and that volunteers are knowledgeable and prepared to appropriately ask their fellow congregants to join in supporting the campaign.
- Consultants are responsible for “troubleshooting.” They should be experts in diagnosing and recommending cures for a campaign in trouble.

Many synagogue leaders wrestle with the question: **How do I pick a fundraising consultant?** Effective consultants are professionals who maintain high standards and maintain their practice according to a strong ethical code. They would charge a fee for service, not a percentage of money raised. Further, consultants should only be used in conjunction with a major campaign effort and, together with the other expenses of the effort, not exceed 8% - 10% of the campaign.

See <http://www.jrf.org/listserves> for a variety of leadership list serves to support those who work on congregational life and financial resources.

## FURTHER RESOURCES

### JRF Development Websites and Resources

- ⇒ <http://www.jrf.org/development>
- ⇒ <http://www.jrfplannedgiving.org>
- ⇒ <http://www.jrf.org/resources-library&tid=2:3&show=#Fundraising>
- ⇒ <http://63.115.67.94/cong/res-money-cong-life-main.html>

### **Torah of Money Seminar Workbook and Curriculum on *Jewish Values, Money and Your Community***

A 600-page resource binder and 140 page curriculum on:

- Perspectives on money and values from classical Jewish texts and Reconstructionist literature and articles.
- Samples of budgets and other planning materials from member communities.
- Approaches to fundraising, capital campaigns, staff expansion, dues structures, financial planning, and solicitations.

⇒ The binder can be purchased for \$54 and the curriculum for \$18 plus shipping from the **Reconstructionist Press**. Please contact Hattie Dunbar, Reconstructionist Press Fulfillment, via e-mail to [hdunbar@jrf.org](mailto:hdunbar@jrf.org) or phone to 215-885-5601 x30.



### **Fundraising Tips**

Rabbi Shawn Zevit

- ⇒ <http://www.jrf.org/showres&rid=179>

### **Congregational Resources Audio Program**

Rabbi Shawn Zevit and Rabbi Mordechai Liebling

- ⇒ <http://63.115.67.94/pub/hmsarchives.html#resources>

### **Money and Congregational Life: A Group Discussion**

Reconstructionism Today, Winter 1999/2000

- ⇒ <http://63.115.67.94/cong/res-mcl-RT99-00.html>

### **Money and Spiritual Life – A Jewish Approach to Obligatory Giving**

Rabbi Shawn Zevit and Bob Leventhal

- ⇒ <http://63.115.67.94/cong/res-mcl-giving.html>

### **Money and Congregational Life, Annotated Bibliography**

Rabbi Jonathan Malamy

- ⇒ <http://63.115.67.94/cong/res-mcl-further-resources.html>