



## Questions the fundraiser may ask:

### 1. WITH WHOM SHOULD I MEET IN PERSON, AND WHO SHOULD I SIMPLY CALL OR EMAIL?

Try to schedule times to meet all of your donors in person. This approach helps to build rapport with each donor and enables you to understand their values and what motivates them to give.

### 2. WHEN IS THE BEST TIME TO CALL?

You know your donors best! Do they work during the day? Do they have childcare responsibilities? Call when it seems most convenient for the donor.

### 3. HOW DO I SET UP AN APPOINTMENT?

Call and let the donor know that you'd like to sit down with them to talk about the Jewish Federation of Greater Pittsburgh's Annual Campaign. Suggest a specific date/time (have two or three options ready), or ask them to name a specific date. Be casual—this is a chance to establish a rapport that you can carry through your solicitation. If they are unwilling or unable to set a time to meet face-to-face, ask if this is a good time to chat on the phone about their Annual Campaign commitment.

### 4. HOW DO I GET AN INCREASED COMMITMENT?

Start by asking the donor about their charitable interests and values. The goal is to find out what matters to the donor and to understand their present philanthropic situation. For a donor experiencing financial hardship, it may not make sense to ask for an increase.

When appropriate, ask for a specific amount based on the ask amount listed on the pledge card. These amounts are set based on an anticipated increase. This suggestion sets a starting point from which you can discuss what the donor is willing to give.

### 5. HOW DO I REGAIN A DONOR?

Take a look at when they last gave and the consistency of their past giving. Start the conversation by thanking them for their past support, and inquire as to why they stopped giving. Depending on the answer, it may be a natural next step to ask them to renew their support. Alternatively, you may want to gain more information about why they stopped giving and to work with your Federation staff person to address concerns or complaints before asking for a renewed commitment. Most importantly, LISTEN if there is a complaint. More often than not, an individual simply wants to be heard.

### 6. WHO ARE THE JEWISH FEDERATION'S BENEFICIARY AGENCIES?

We have nine "beneficiary agencies" who receive sustaining support and strategic planning help from Jewish Federation:

- Community Day School
- The Edward and Rose Berman Hillel Joint University Center
- Hillel Academy
- Jewish Association on Aging
- Jewish Community Center of Pittsburgh
- Jewish Family & Children's Service
- Jewish Residential Services
- Riverview Towers
- Yeshiva Schools

The Holocaust Center of Pittsburgh and Classrooms Without Borders are independent organizations of the Jewish Federation of Greater Pittsburgh. Several other Jewish organizations are also supported with varying levels of funding. Additionally, our overseas partners the American Jewish Joint Distribution Committee (JDC) and the Jewish Agency for Israel (JAFI) help in over 170 countries around the world.

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## **7. OTHER THAN THEIR PLEDGE, WHAT ADDITIONAL INFORMATION SHOULD I COLLECT?**

Please verify the donor's mailing address, telephone number and email. If we do not have one or more of these pieces of information on the pledge card, please request them. Finally, if the donor does not have a fund in the Jewish Community Foundation or has not endowed their Annual Campaign gift, ask if the donor is interested in learning more. If so, forward their name to Dan Brandeis at 412-992-5220 or [dbrandeis@jfedpgh.org](mailto:dbrandeis@jfedpgh.org) or Sharon Perelman at 412-992-5224 or [spelman@jfedpgh.org](mailto:spelman@jfedpgh.org).

## **8. WHAT SHOULD I SAY IF I LEAVE A VOICEMAIL?**

Tell the donor you want to sit down with them to talk about the Jewish Federation of Greater Pittsburgh's Annual Campaign. Let them know you will follow up in a few weeks if you haven't heard from them.

## **9. HOW LONG SHOULD I WAIT UNTIL I FOLLOW UP AFTER LEAVING A VOICEMAIL OR SENDING AN EMAIL?**

A few days to a week is appropriate, depending upon your relationship with the donor. Many solicitations get stretched out over months because of "phone tag" between fundraiser and donor, so the earlier in the campaign you can be in touch, the better.

Noteworthy item to mention:

- Giving Tuesday: #GivingTuesday is a global day of giving generated by the power of social media and is observed on the Tuesday following Thanksgiving. This year it falls on November 29, 2016 and will ignite the charitable season, when many focus on their holiday and end-of-year giving.

## **Questions a fundraiser might be asked:**

### **1. HOW ARE MY DOLLARS BEING USED?**

The back of the pledge card provides details on the major focus areas of the campaign. You can start your discussion with that information, and work with your Federation staff person to obtain any additional details the donor requests. The Federation's website ([www.jfedpgh.org](http://www.jfedpgh.org)) is also a great source of information.

### **2. WHAT ARE MY PAYMENT OPTIONS?**

Payment on an Annual Campaign pledge is not due until December 31 of the calendar year of the Annual Campaign. For example, a pledge made in October of 2016 toward the 2017 Annual Campaign is not due until December 31, 2017 - more than a year away! This flexibility can be a good way to encourage donors to increase their gifts.

- If they wish to pay immediately, ask David Guzikowski (412-992-5255) or Erin Wyland (412-992-5252) to call them and obtain their credit card information.
- Otherwise, donors will be billed for their pledge six times per year.
- A credit card payment plan can also easily be set up. Again, please have them contact David or Erin to set this up.

### **3. CAN I ALLOCATE MY PLEDGE TO A PARTICULAR CAUSE?**

One of the benefits of giving to the Annual Campaign is the Jewish Federation's expert community planning to determine the areas of greatest community need. The Annual Campaign leverages the power of collective giving for maximum impact and therefore, pledges cannot be earmarked for a particular cause.

However, creating a donor-advised fund in the Jewish Community Foundation does allow you the flexibility to support causes you care about while benefitting the Jewish community. If a donor is interested in a donor-advised fund, please refer them to Sharon Perelman or Dan Brandeis for more information.

### **4. I FEEL LIKE I JUST GAVE TO THE CAMPAIGN. WHEN IS THE CAMPAIGN YEAR?**

Our fiscal year runs from July 1 to June 30. We are actively working to speed up the pace of the campaign so that all campaign commitments are made by the final Funding Committee allocation meeting of the year at the end of May. Therefore, you may be contacted earlier than in previous years. Pledging earlier in the fiscal year ultimately helps our funded agencies and organizations plan more in advance. Remember, regardless of when you make your pledge, payment is not due until December 31 of the current campaign year.

### **5. DO MY DOLLARS GO TO HELP THE ISRAELI GOVERNMENT?**

No. Your dollars support Israel largely through the Jewish Agency for Israel (JAFI). This agency funds health and human services; economic development; coexistence between Jewish Israelis, Arab Israelis, and Israel's neighbors; and Aliyah, or immigration services such as Hebrew language training, for Jews seeking to move to Israel.