

# UJA Federation Of Greater Washington

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Presentation Of Findings

The Mellman Group

February, 1997



**Please Note:**

**The following represents the findings of an extensive market research effort conducted in late 1996 and early 1997.**

**A comprehensive marketing plan will combine recommendations from the study, implementation strategies, timelines, budgets and evaluative mechanisms. This plan, which will address the short and long term implications of the research, will be completed in the weeks to follow.**

**Please address all questions and feedback to Debra Goldstein at (301) 230-7200.**

# KEY FINDINGS

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- ✓ Donors Have High Regard For UJAF
- ✓ Non-Donors Appear To Have Vaguer And More Negative Views Particularly Around The Institution's Impersonal Nature
- ✓ Donors Seem Less Likely To Increase Giving In The Near Term
- ✓ Many Lapsed Donors Think They Are Still Giving
- ✓ Our Donor Base Skews Older
- ✓ Knowledge Of Where The Money Goes And Confidence In Federation's Ability To Direct It To The Right Place Are Key Determinants Of Giving
- ✓ The Distribution Of Dollars Is Not Far From Donors' Ideal
- ✓ Donors Have Many And Varying Motivations
- ✓ Our Strongest Messages Focus On Specific Ways Giving To Federation Fulfills Our Tradition Of Tzedakah
- ✓ Solicitation Experiences Are Not A Key Problem For Current Donors
- ✓ Donors Prefer Targeted Communications
- ✓ Events Are Of Questionable Utility



# Methodology

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## ✓ **Focus Groups: July 1996**

- female donors who contribute \$1,000-\$10,000 to UJAF
- male donors who contribute \$1,000-\$10,000 to UJAF
- potential donors who contribute \$1,000 or more to charitable organizations, but do not contribute to UJAF

## ✓ **One-On-One Interviews: September 1996**

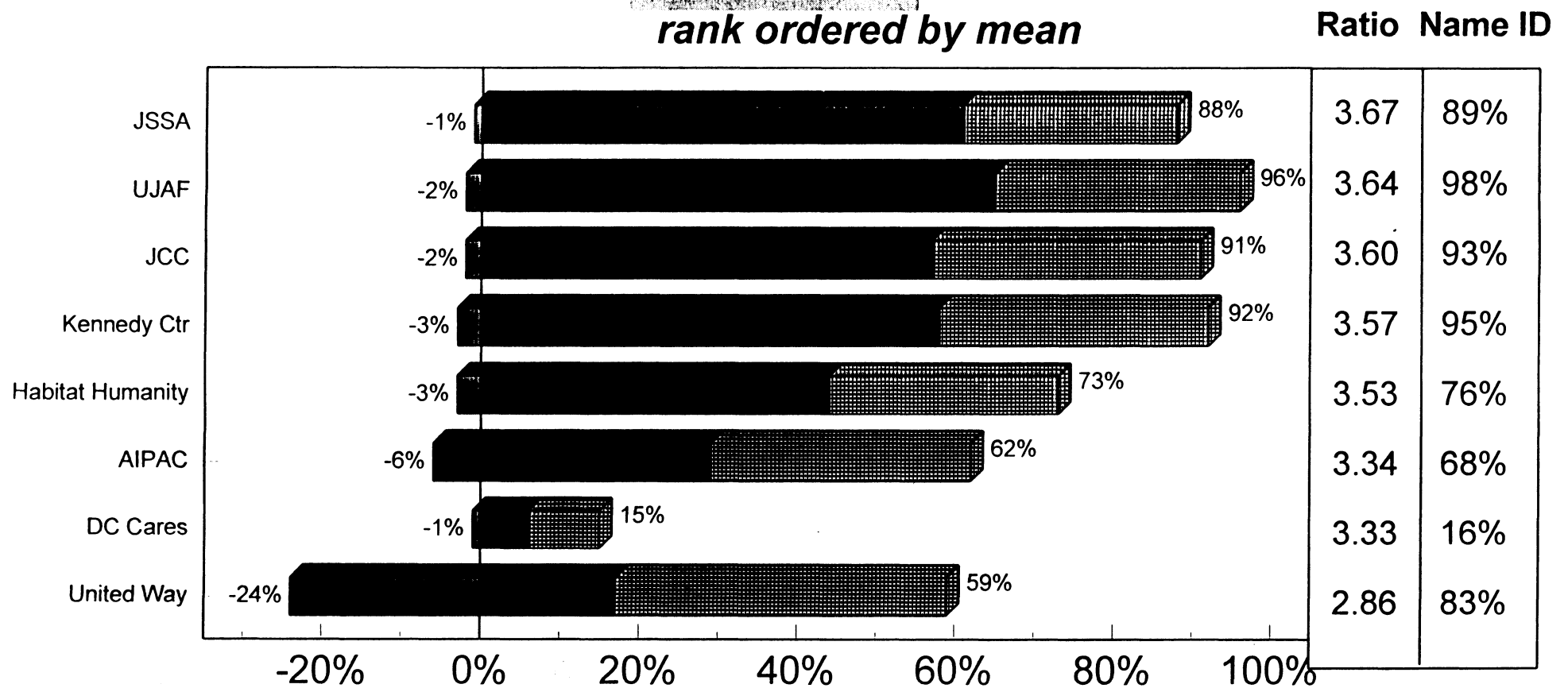
- 10 interviews of lapsed donors who had contributed \$1,000-\$10,000 to UJAF

## ✓ **Survey: January 1997**

- 451 UJAF donors who contribute up to \$10,000 to UJAF annually
- interviews were conducted between January 5-9, 1997
- margin of error for sample as a whole is +/- 4.6 percentage points



# UJAF Is Highly Regarded By Donors



very favorable
  somewhat favorable
  unfavorable



# Donors Feel A Name Change Would Be A Waste Of Time And Money

Yeah, this is established. That's a positive that it's established. (female donor)

Yeah, then it will take five years to figure out who is who. (female donor)

Two logos ... you'll have to have logos on everything to switch from one to the other. (female donor)

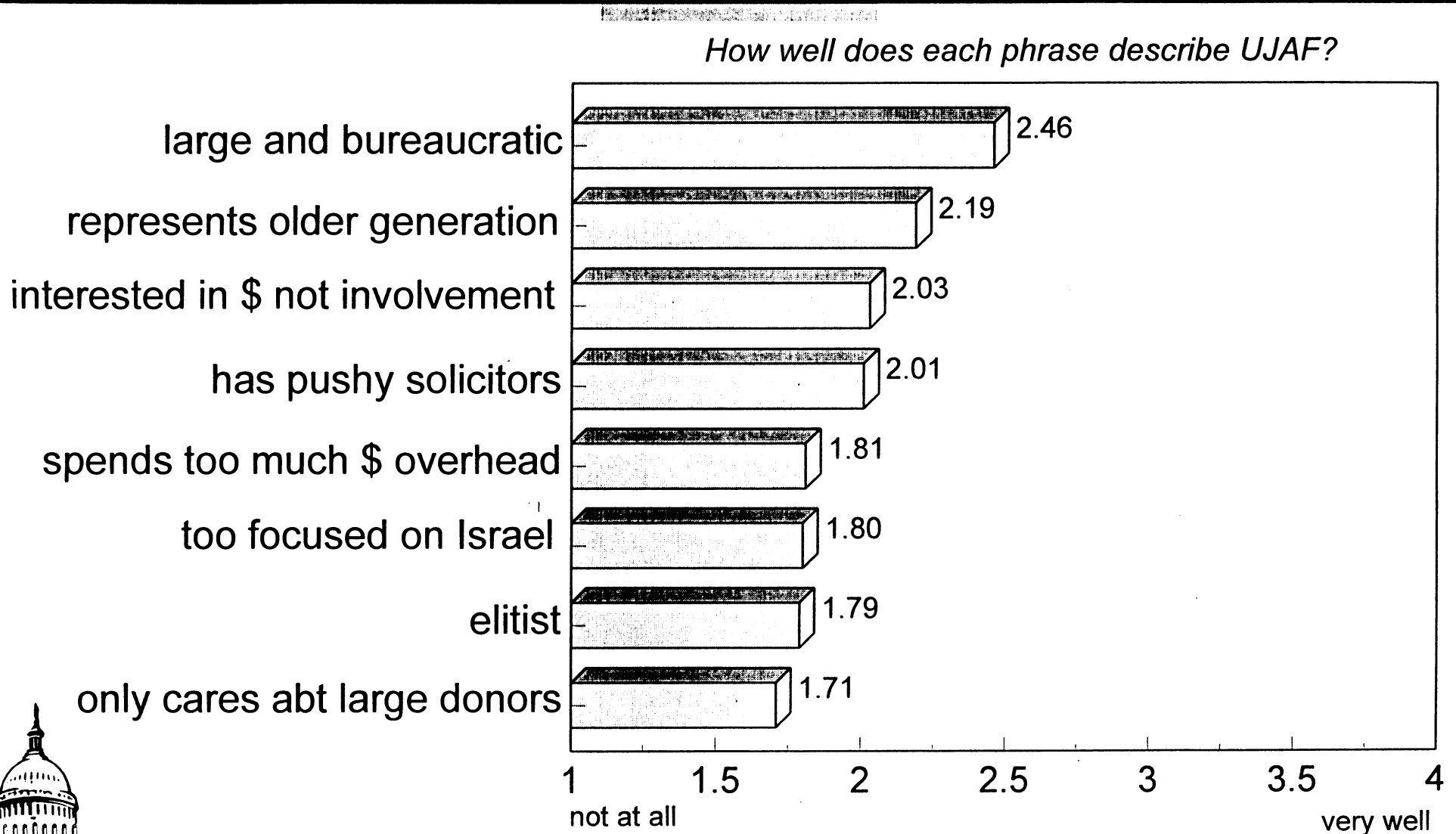
That costs new stationary. (male donor)

Why spend the money. (male donor)



# Donors Are Divided On Whether UJAF Is Large And Bureaucratic

No Other Negative Images Are Widely Shared



# Many Non-Donors Have Little Sense Of What Federation Is Or What It Does

- When I think of ADL, I have that vision in a nano-second. That's taking care of the bad guys. When I think of Federation, I don't have a vision ... (male lapsed donor)
- Is it like the United Way for Jews? Does anybody know? (female potential donor)
- I have no real sense of what their mission is in the Washington area ... (male potential donor)





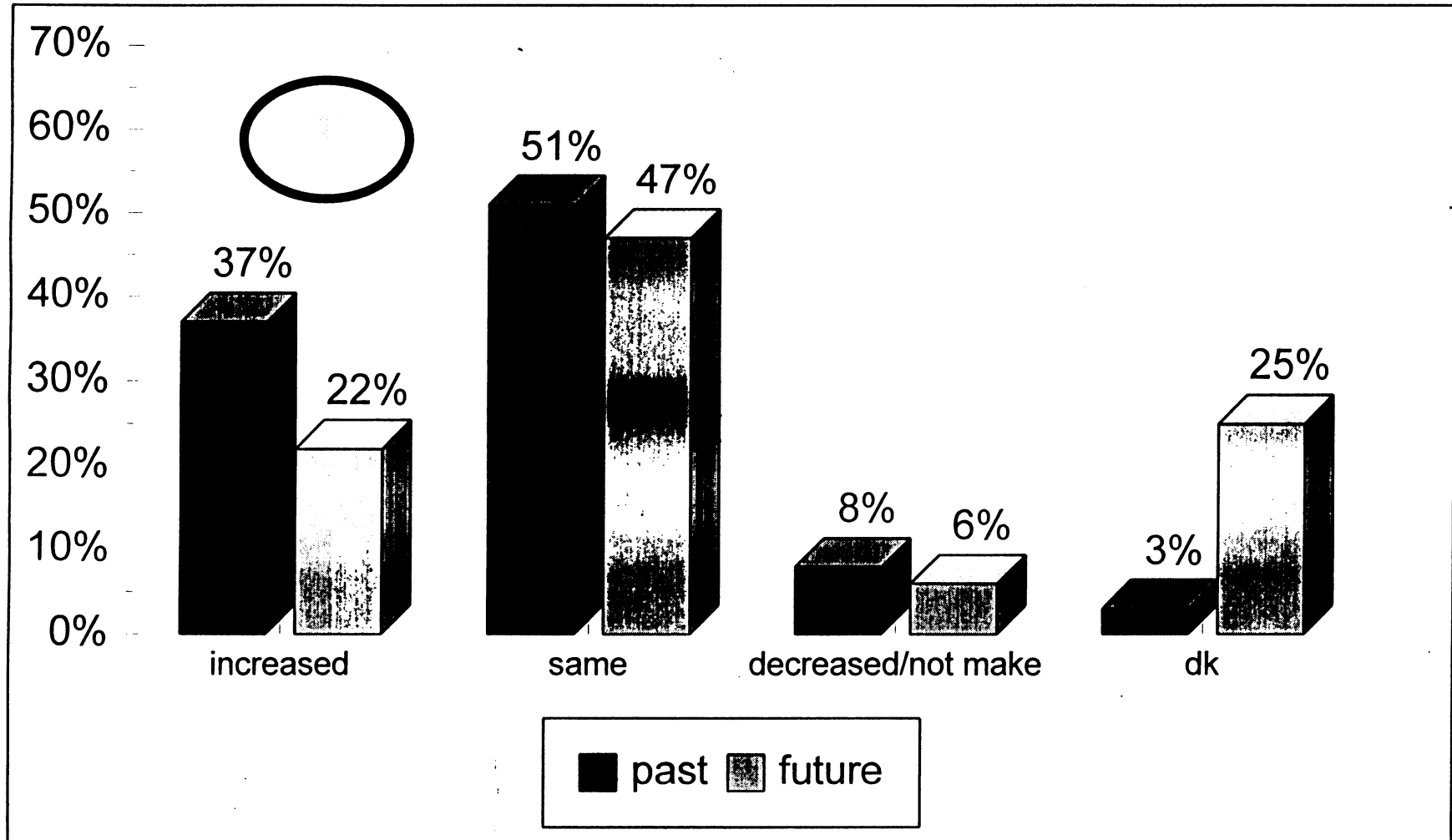
# Potential Donors List A Variety Of Other Reasons Why They Do Not Contribute To UJAF

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- ✘ Too large and institutional
- ✘ Does not create a sense of community
- ✘ Only interested in your money
- ✘ Organization for large contributors only
- ✘ Pushy solicitors
- ✘ Overhead is too high
- ✘ Too focused on Israel, too "Zionist"
- ✘ Represents an older generation

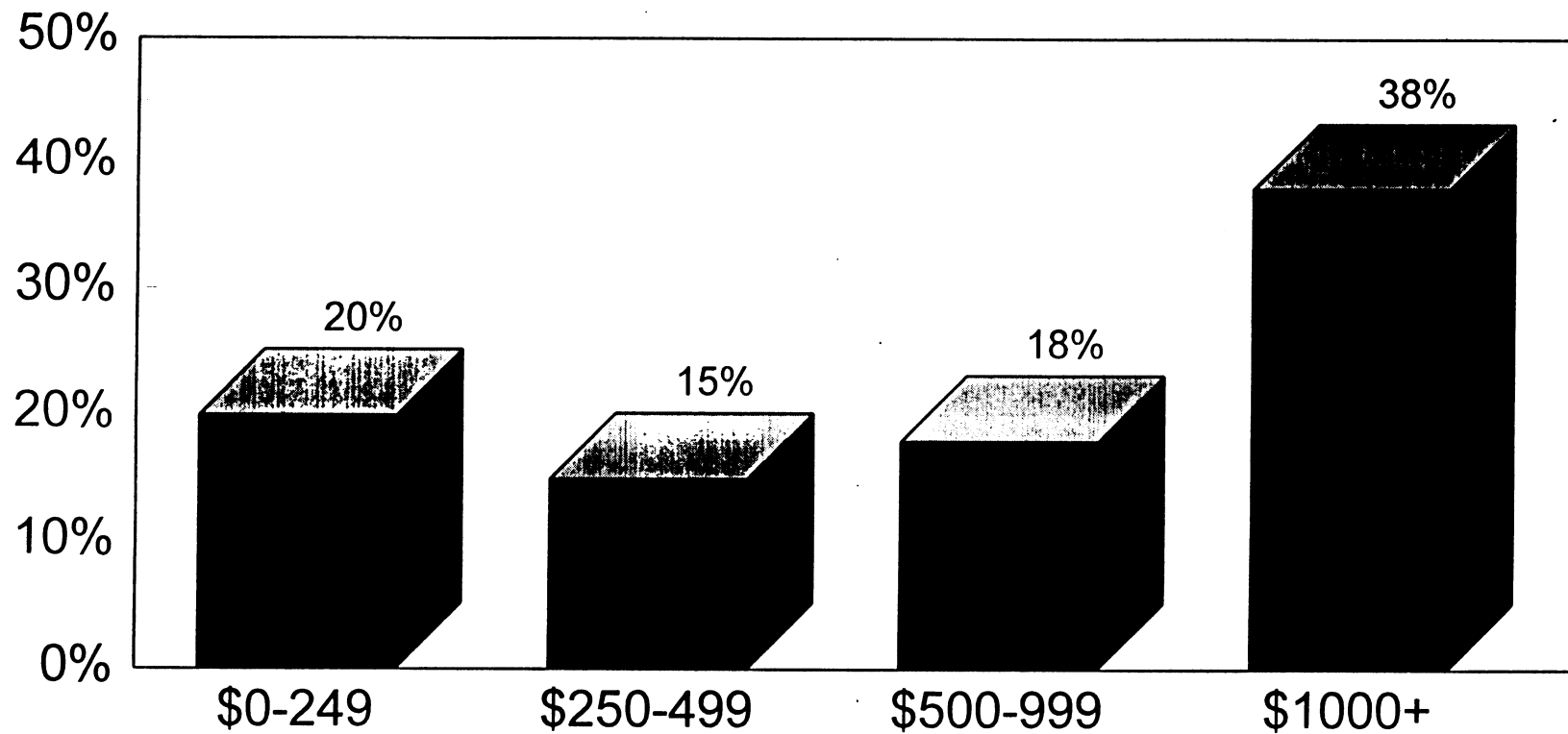


# The Number Who Plan To Increase Gifts Next Year Is Significantly Smaller Than The Number Who Report Past Increases



# Those Who Already Give The Most Are Most Likely To Increase Their Gift

*% who will increase 1997 gift*

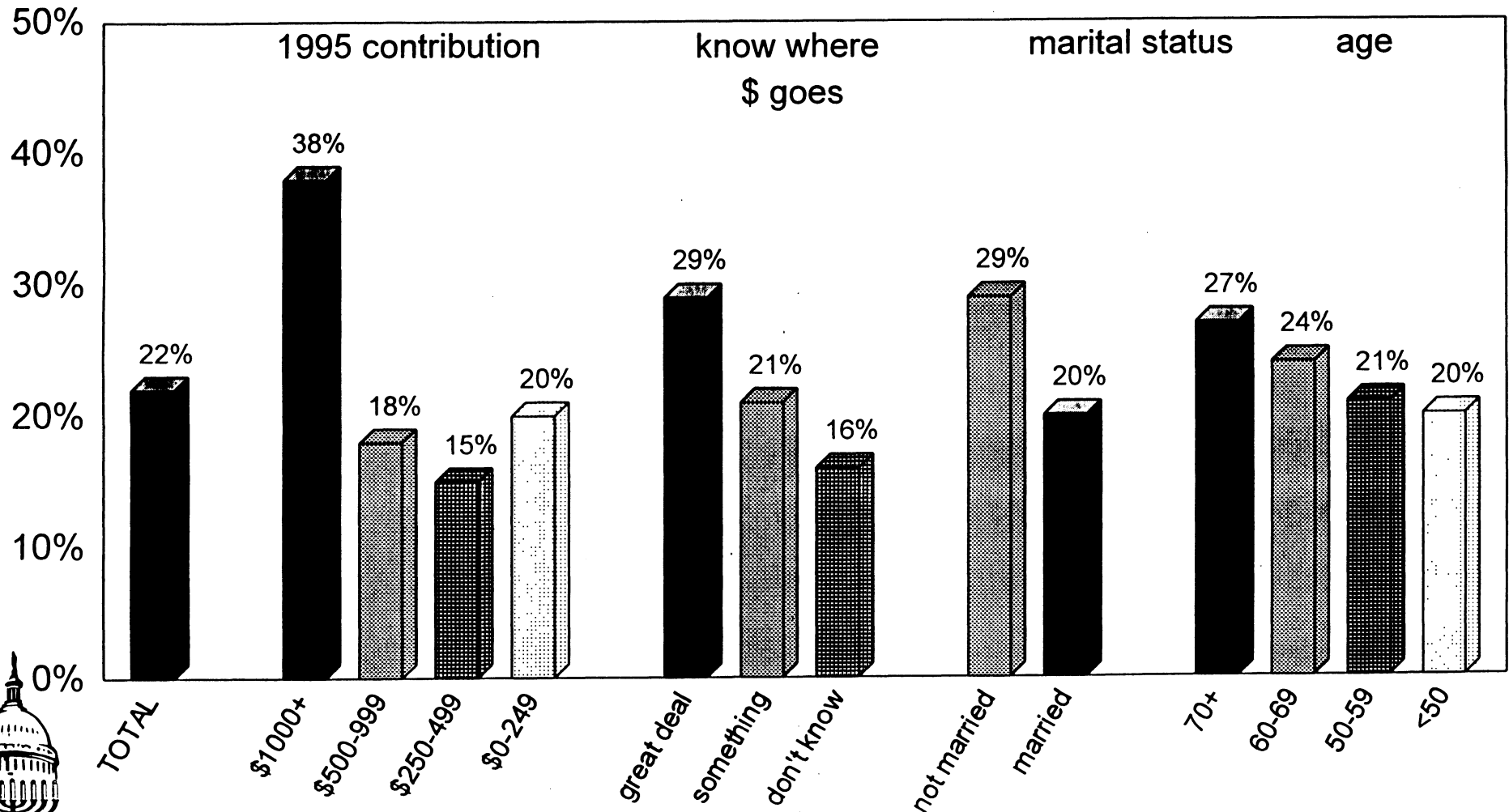


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■ 1996 donation

# There Are Differences Across Subgroups In Future Plans To Donate

*% who will increase gift in 1997*



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# Many Lapsed Donors Think They Are Currently Giving

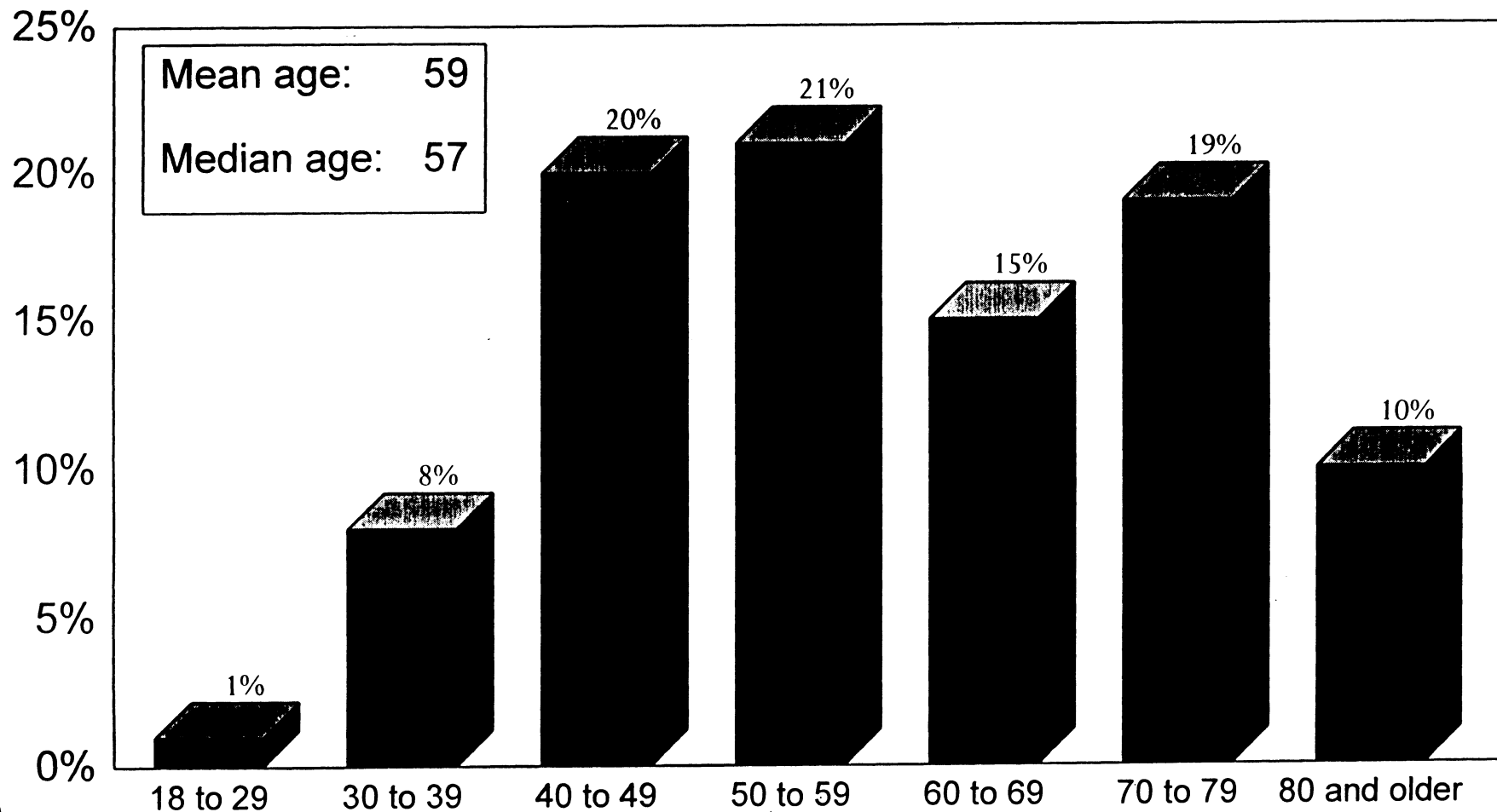
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- Well I just feel that it's a necessity to give to Federation ... it's of course we'd give to Federation. I wouldn't not give to Federation. (female)
- Well it's one of our targets of our charitable giving, whatever we can afford each year. I mean it's automatically along with probably along with 15 other recipients of our hard-earned dollars that's on our list permanently probably ... So I guess that illustrates that that is a pretty permanent kind of commitment. (female)
- Well, I would never not support it, and I would never not give money to it. I guess it's as simple as that. It's something that I do. (female)
- I am a donor all the time to that. (male)
- Yes, we give to UJA Federation. I have done consulting for them and I attend the UJA Federation General Assembly ... this may skew you because I am not your average John Q. Average. I am more knowledgeable ... (male)
- United Jewish Appeal. I know that my husband and I give to that and you know, it's funny because I think they solicit too much. Because I've been for the last few years a record of every time I give and it seems like every month or every other month I am getting something. I don't remember right off hand what the time was. But I know that I have given a couple times already this year. (female)



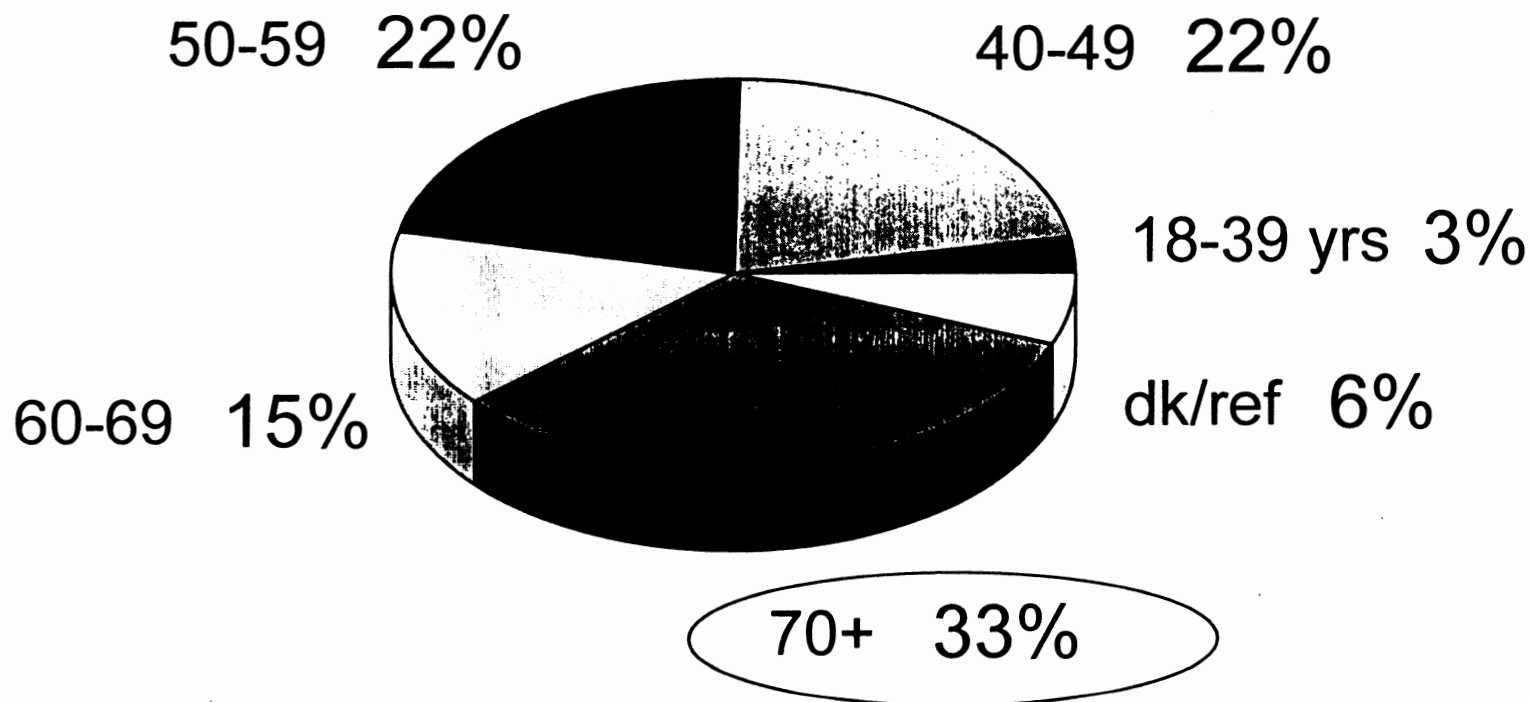
# The UJAF Donor Base Skews Older

## More Givers Are Over 80 Than Under 40



# One Third Of Respondents' 1995 Gifts Came From Those 70 Or Older Half From Those Over 60

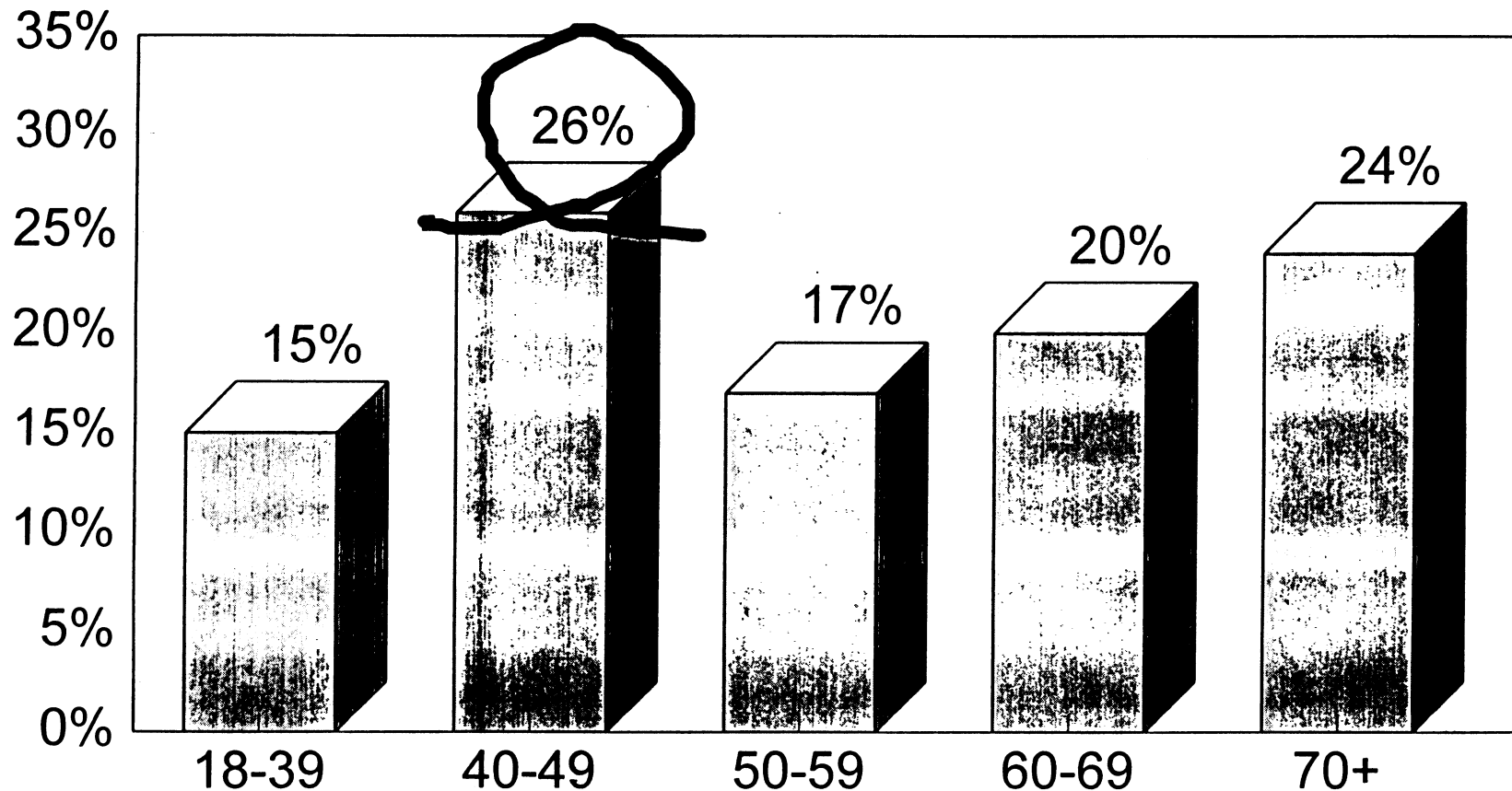
*percent of total contribution by age cohort*



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# Baby Boomers Are A Bit More Likely To Give Large Gifts

*% of age group that gives \$1000+*

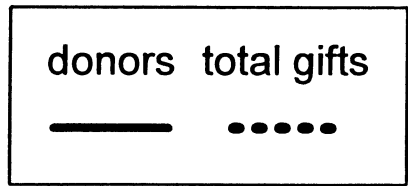
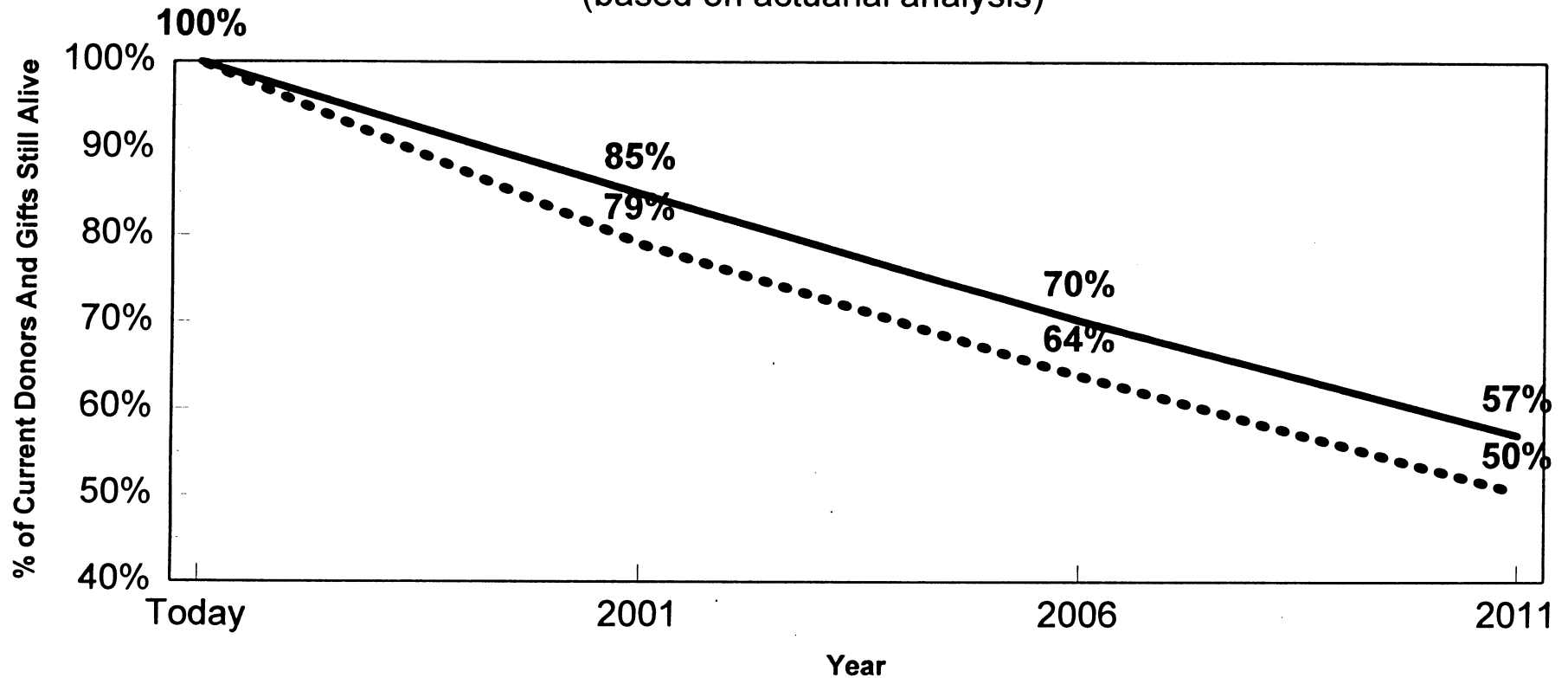


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# In Ten Years, Almost A Third Of The Current Donor Base, Representing More Than A Third Of Gifts, Will Be Dead

(based on actuarial analysis)

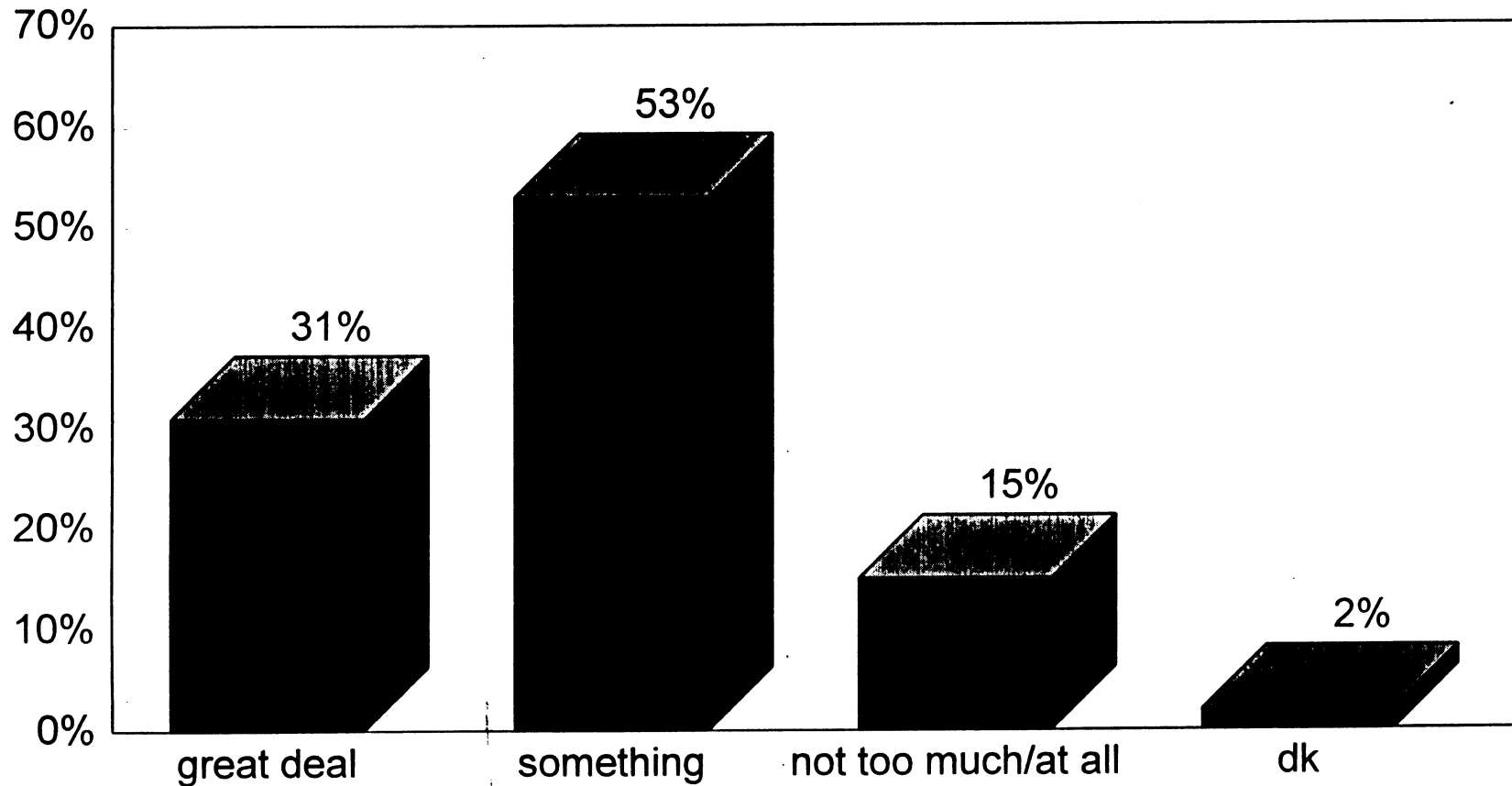


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# Only A Third Of Donors Know A Great Deal About Where Their UJAF Contributions Go

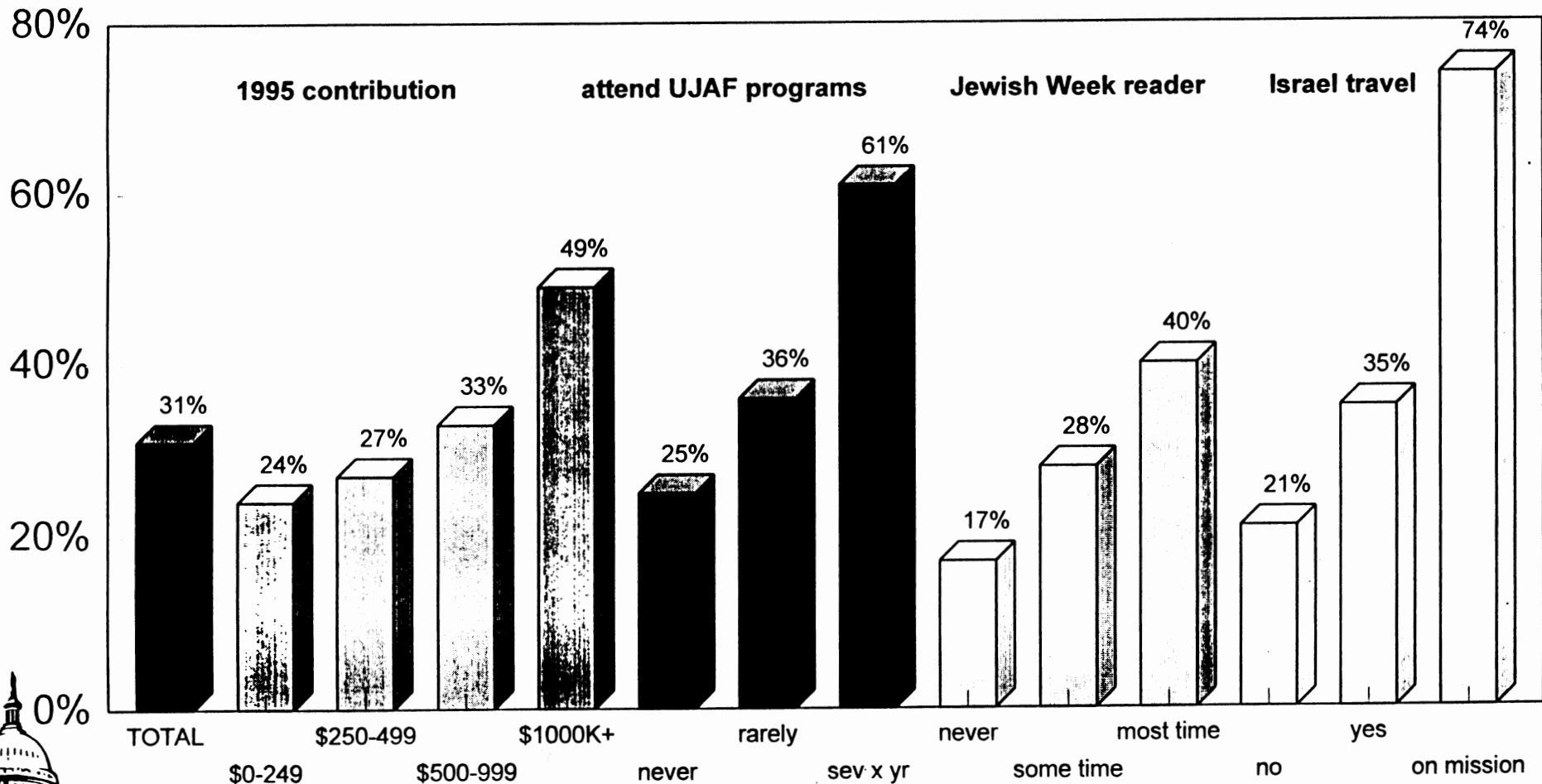
Estimated from 2008 survey

*How much do you know about where your UJAF contribution goes?*



# Not Surprisingly, Donors Who Are More Vested In The Organization And In The Jewish Community Feel More Informed

*% know a great deal about where money goes*



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# Many non-Donors have NO Knowledge Of How The Money Is Spent

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**Moderator: And what issues do they work on that you think are important?**

- Gosh, you know, at this point I can't even remember. Maybe I am just tired. (female potential donor)

**Moderator: Do you have a sense of where Federation's money goes?**

- I know I know because I read their literature every time I get it but I just can't think of it right now. (female potential donor)
- Not much. (female potential donor)
- Only vaguely. (male potential donor)
- No, I couldn't tell you exactly where it (Federation money) goes to in detail. We get a lot of information from them but to tell you the truth, I don't read it. I don't know, I feel that they support the more formal Jewish organizations which I support too but it's not anything that I am particularly interested in myself other than anti-Semitism and things like that. (female potential donor)
- I would like to say I do not know where the money goes. I don't know. I'm not trying to say their ripping people off ... I just don't know where the money goes. (male potential donor)



# Donors Trust That UJAF Will Put Their Money In The Right Places

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- The last thing I said about UJA is they do very good work in directing dollars to where it's needed most. You get that with UJA, I don't worry about what's going to which youth group or whatever. It covers the spectrum. (male donor)
- Somebody like me who really, I am interested in general. I don't have any one thing that I am ... to me it's fine because they are putting it where they think it is needed. (female donor)
- What UJA does is it gives me a sense of confidence that they'll take me money and more or less do what I'd like them to do with it. It frees me from the responsibility of having to find out whether I'm right or wrong. (male donor)



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# By Contrast, Non-Donors Do Not Trust The Allocations Process

How do they know what's best for me? And what's best for is not necessarily best for Carol, or Larry or whatever? (potential male donor)

Who are these people? How are they deciding this [how to allocated funds], and why and how are they going to do with it? And I have a hard time in any case writing a blank check ... I need to know I have some kind of voice in it. (potential female donor)

It's really not giving you a decision. It says; "we'll take care of you." When I'm six years old and my mother would say, "I'll take care of you." (potential female donor)

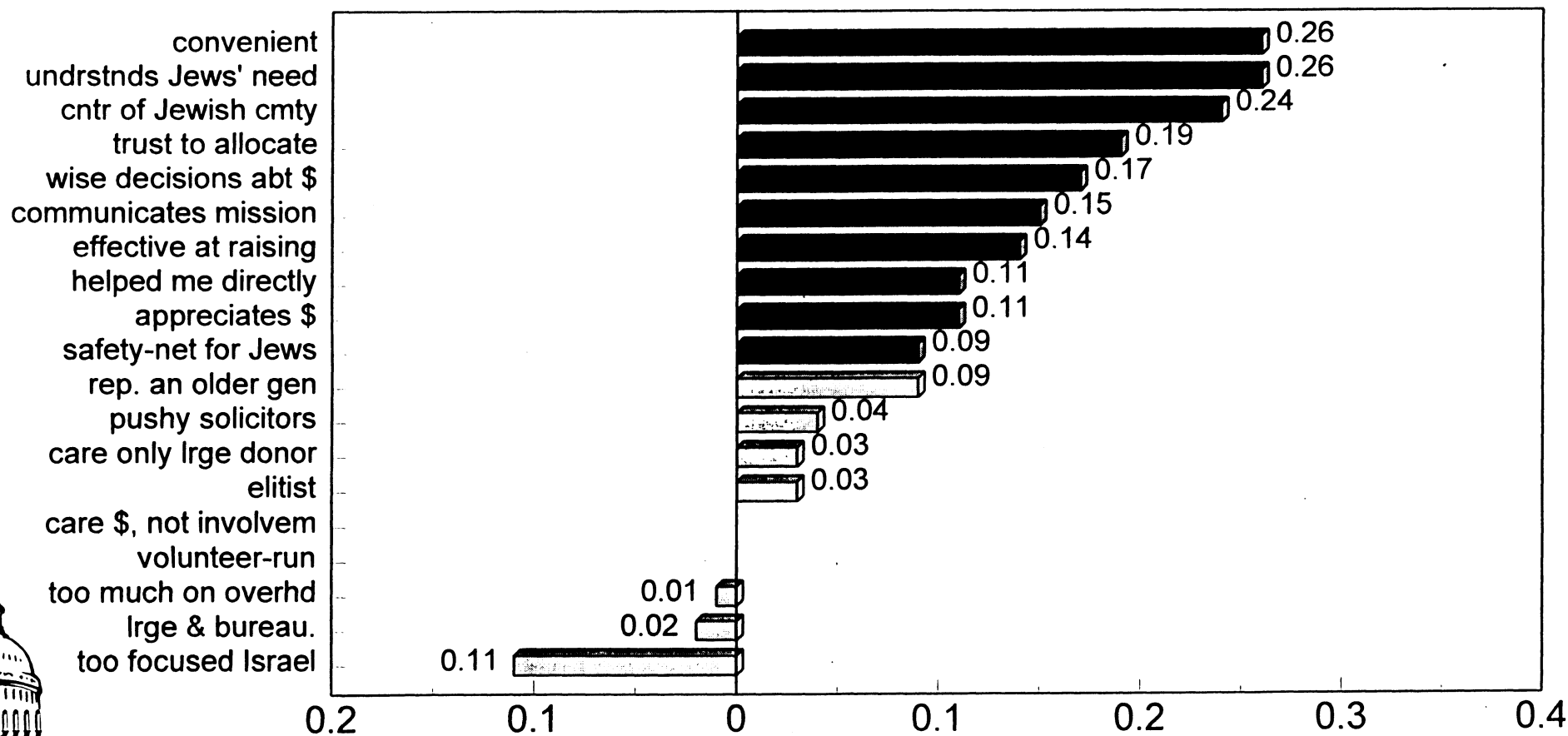


# Those Planning To Increase Their Gifts Are More Likely To Trust UJAF To Allocate Funds Wisely Than Those Who Could Increase Their Gifts But Are Not

difference in mean score between:

Those increasing charitable gifts but not to UJAF

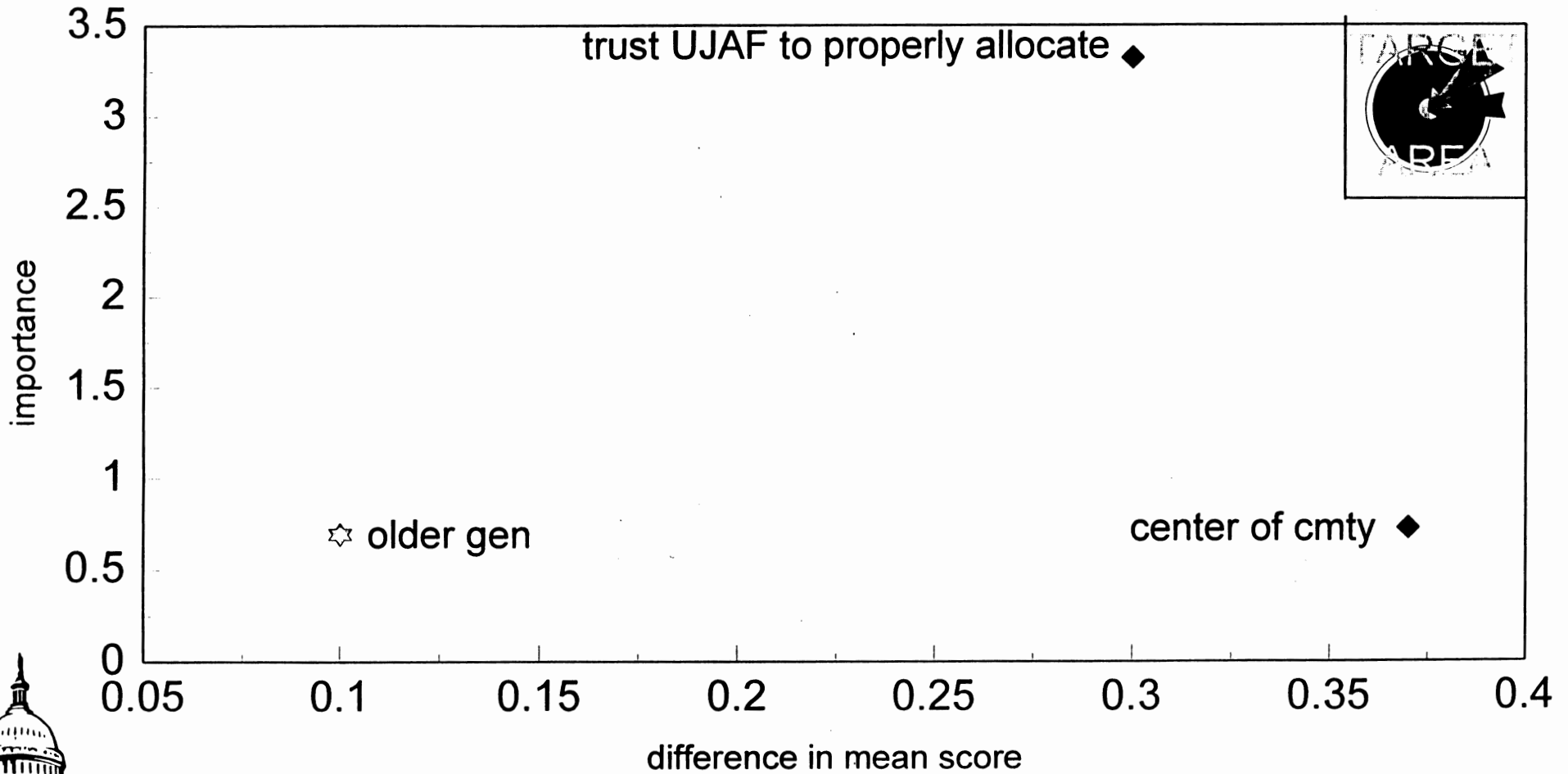
Those planning to increase UJAF gift



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# Our Strategic Map Shows The Importance Of Trust In UJAF Allocation Decisions As A Cause Of Increased Giving

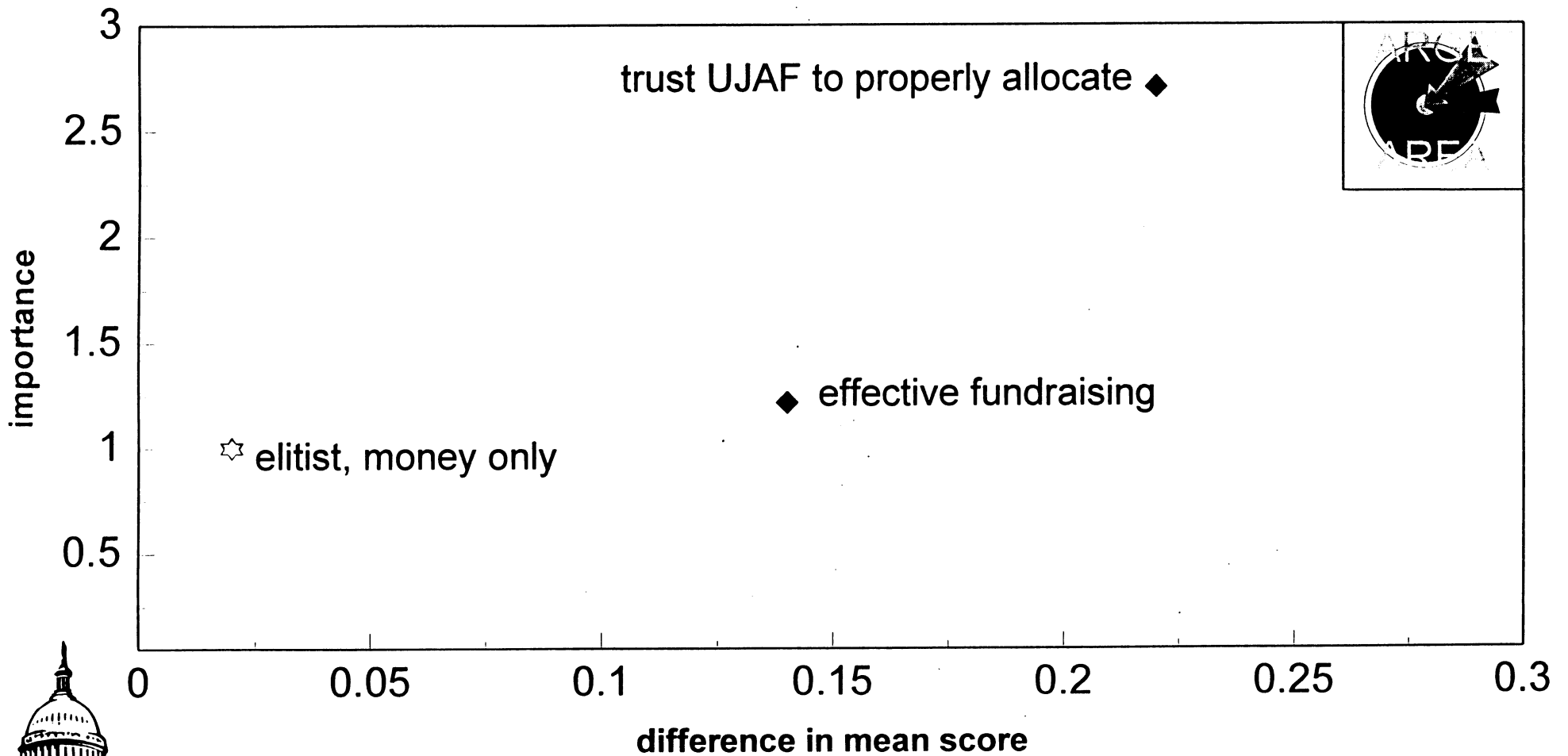
*based on regression analysis*





# Confidence In The Allocations Process Is Also A Central Determinant Of Increased Giving

*based on regression analysis*



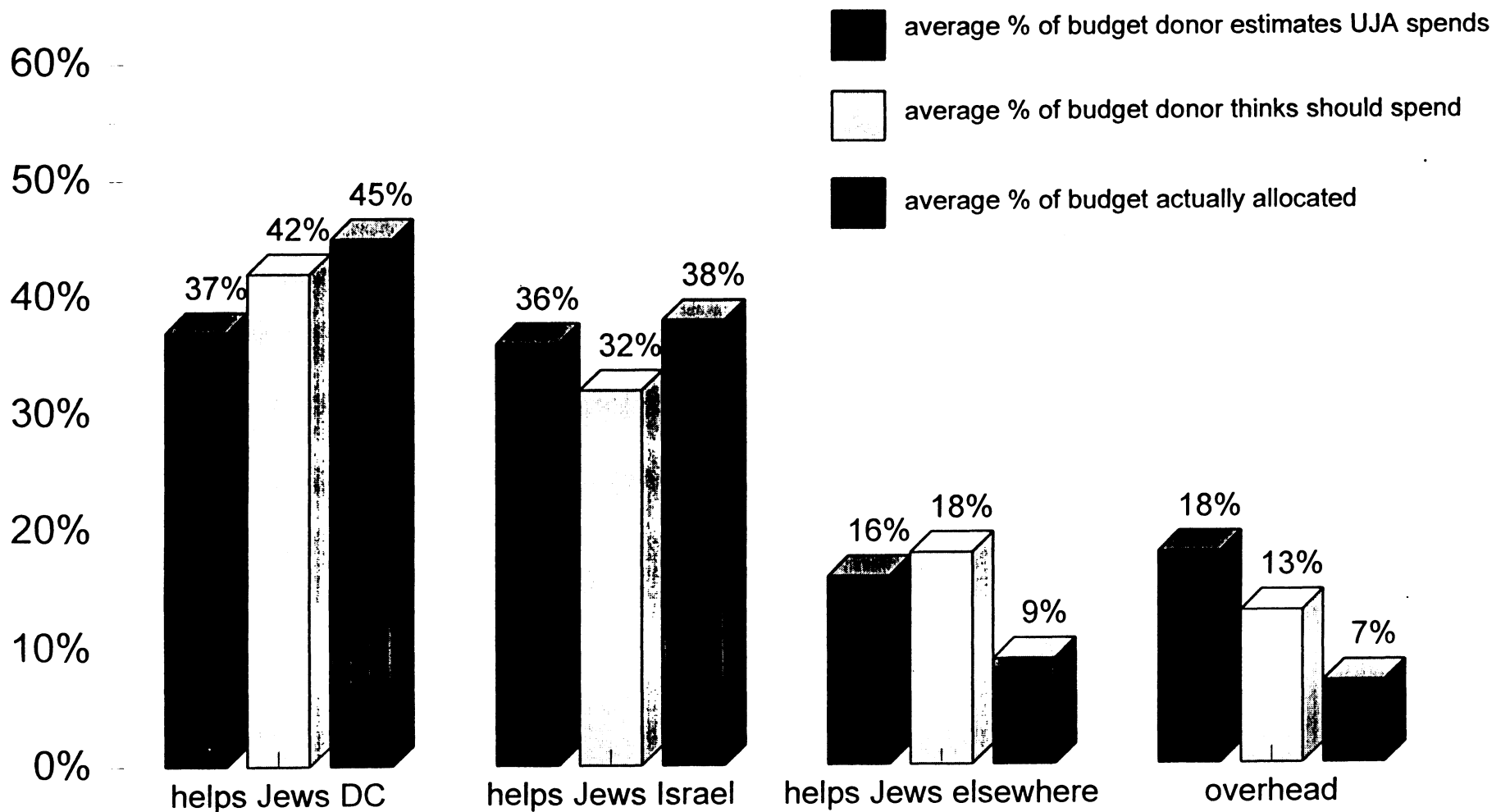
# For Many A Personal Connection Means Understanding The Personal Impact Of Their Gift

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- Because I don't feel a strong commitment to UJA even though I have given money to UJA for 25 years. I have done it for my synagogue, I have done it for Ben Gurion University. I have participated in things like the Jewish Fund for Justice because I can identify with it more closely. Maybe it is the nature of the beast because it is too comprehensive. (female donor)
- I think few people understand where their money's going to and don't have a personal connection. They don't see it. They don't see that child in Israel or the old age home, wherever. I think the personalness. In the case of smaller Jewish fundraising organizations, maybe a school where people come to a meeting and they're buying a new wing on their school. They're buying textbooks or whatever. It's more personal. (male donor)
- Well we look at, first we give a certain amount to UJA because we feel that gives, they spread it out to the organizations that really need it. And then we look at how it affects our family - what charities we can give to that affect...and right now it is like the Jewish Day School. We have a daughter there, they need our money (female donor)
- I give voluntarily and so if I'm giving to Jewish Social Service Agency which is also covered by UJA, then I am helping JSSA more. I suppose if I didn't give individually to these various groups, I would give all the money to UJA, but... (male donor)
- And the main reason with UJA with not giving is that they give out to multiple groups and I've learned more about those groups and I now give directly to those groups. Instead of having them decide where to put my money, why not just give the money directly to those groups? I may now send ten checks but at least I know it goes directly to those ten groups. (female lapsed donor)



# The Distribution Of Dollars Is Not Far From Donors' Ideal



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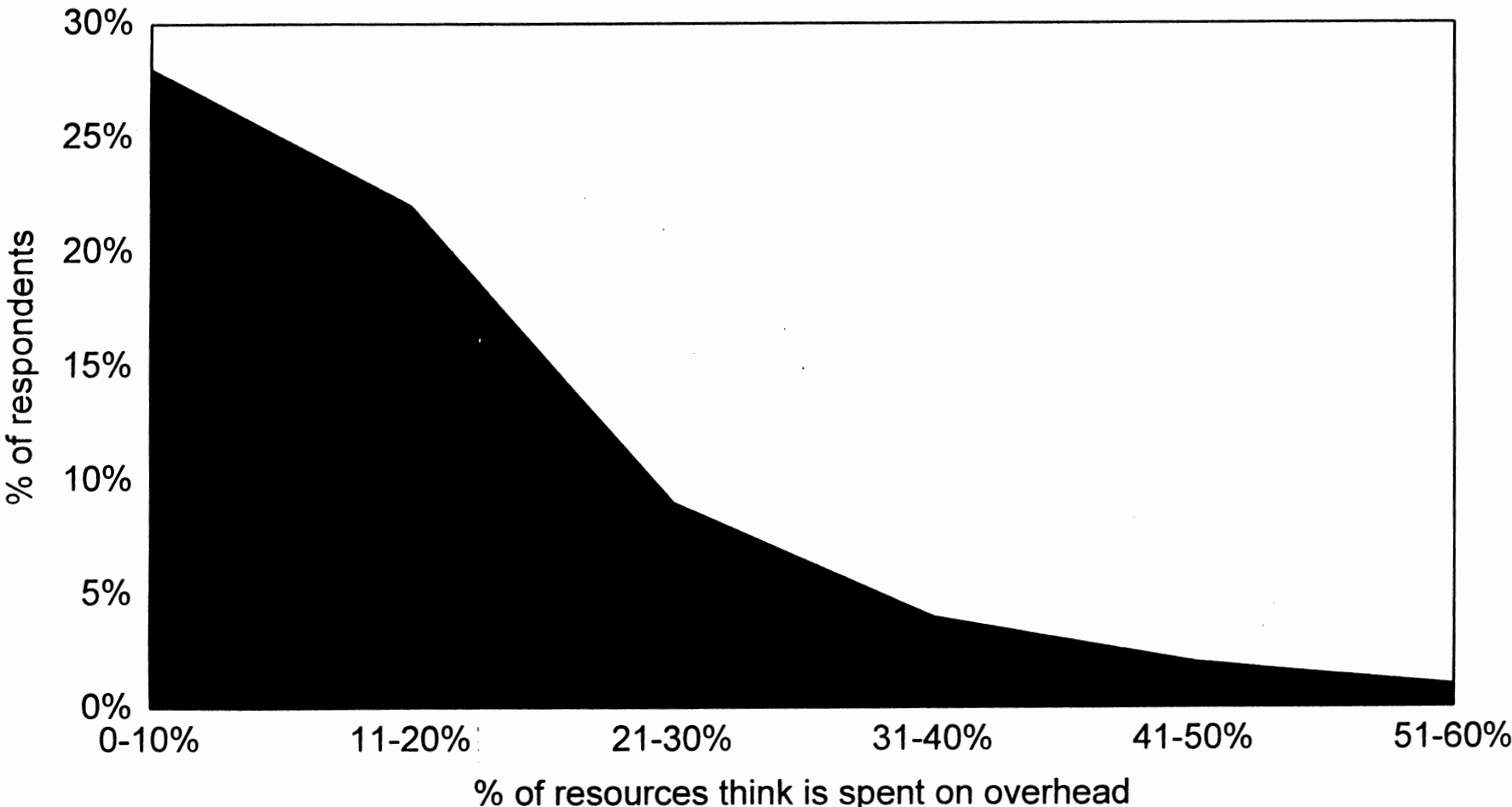
# Overhead Is A Big Concern

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- The United Way thing may have had some pretty bad spill out for every organization and it may be necessary to take some proactive steps to show that this organization is not like that organization. (male potential donor)
- I used to try to really look into the overhead costs of all the charities I gave to and I did it for a while and then I stopped. Since I have actually gotten to where I give more to Jewish organizations I haven't been checking up on it. (female donor)
- I think one thing that I wrote down ... was perhaps slightly high on overhead. And my impression comes from the combined federal campaign, which puts out a book every year on all the charities that are eligible and one thing they list is each charity. There's a couple thousand charities around, their overhead. I believe that if I remember correctly, UJA was a little high. It wasn't extraordinarily high, but -- (male donor)
- It's very important to me to know what percentage of my dollar is being used for where and how much is being used for administration. (female potential donor)

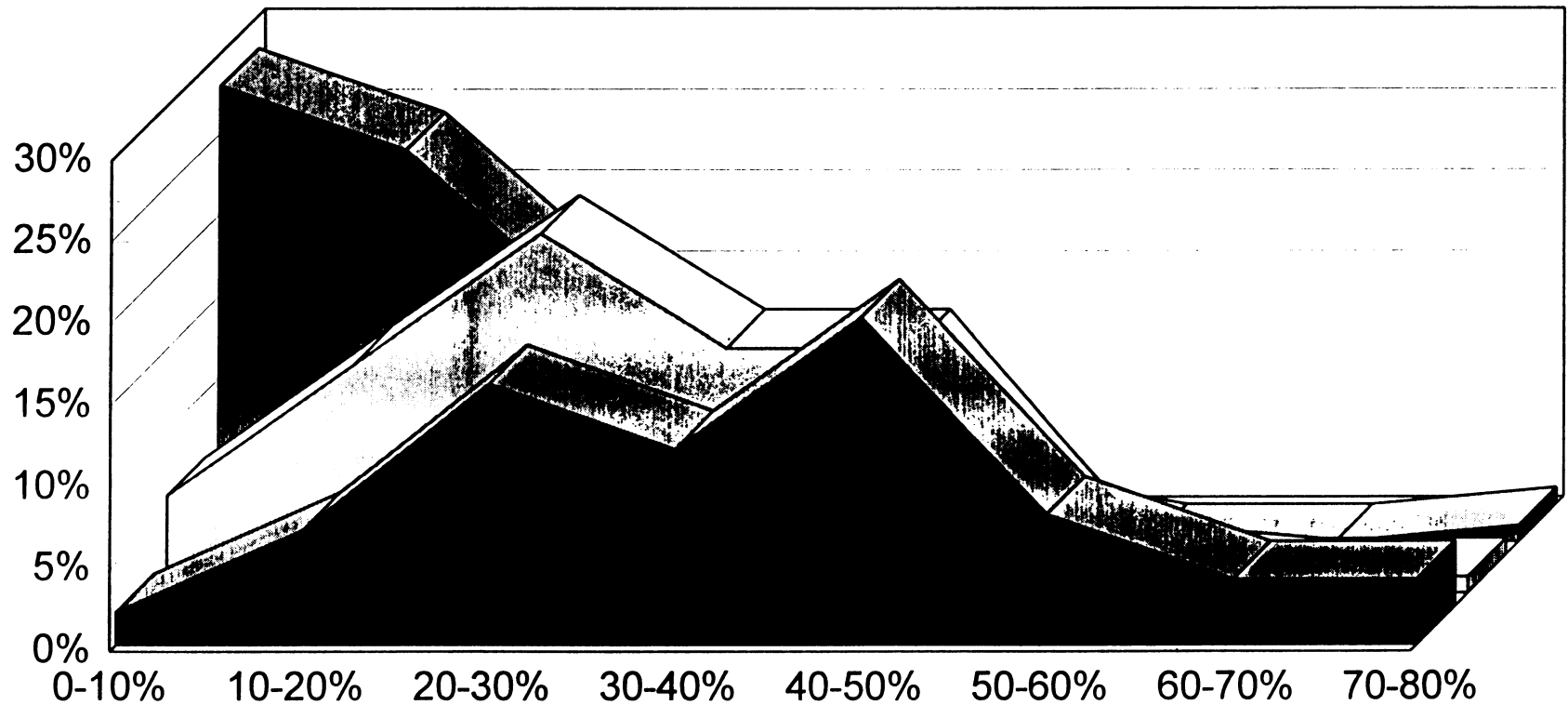


# Most Donors Believe That UJAF Spends Less Than A Fifth Of Its Resources On Overhead



# More People Want Their Money To Stay At Home

*% distribution of how want resources allocated*



■ DC ■ Israel ■ other countries



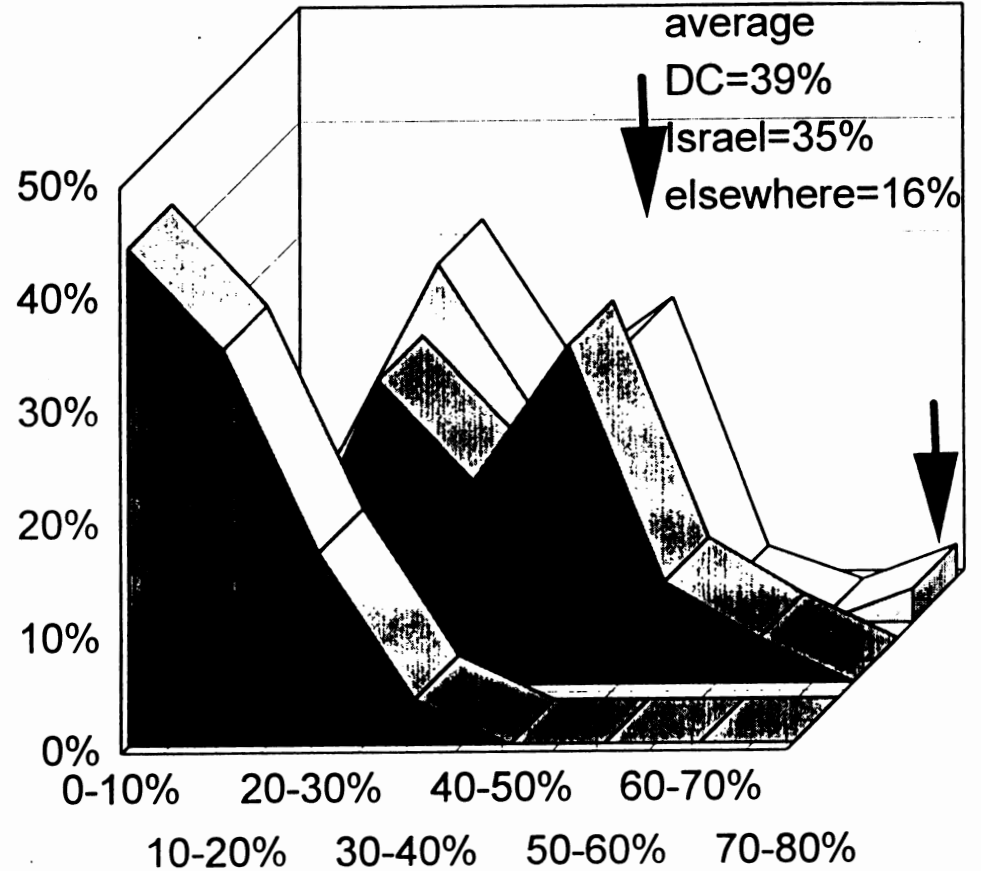
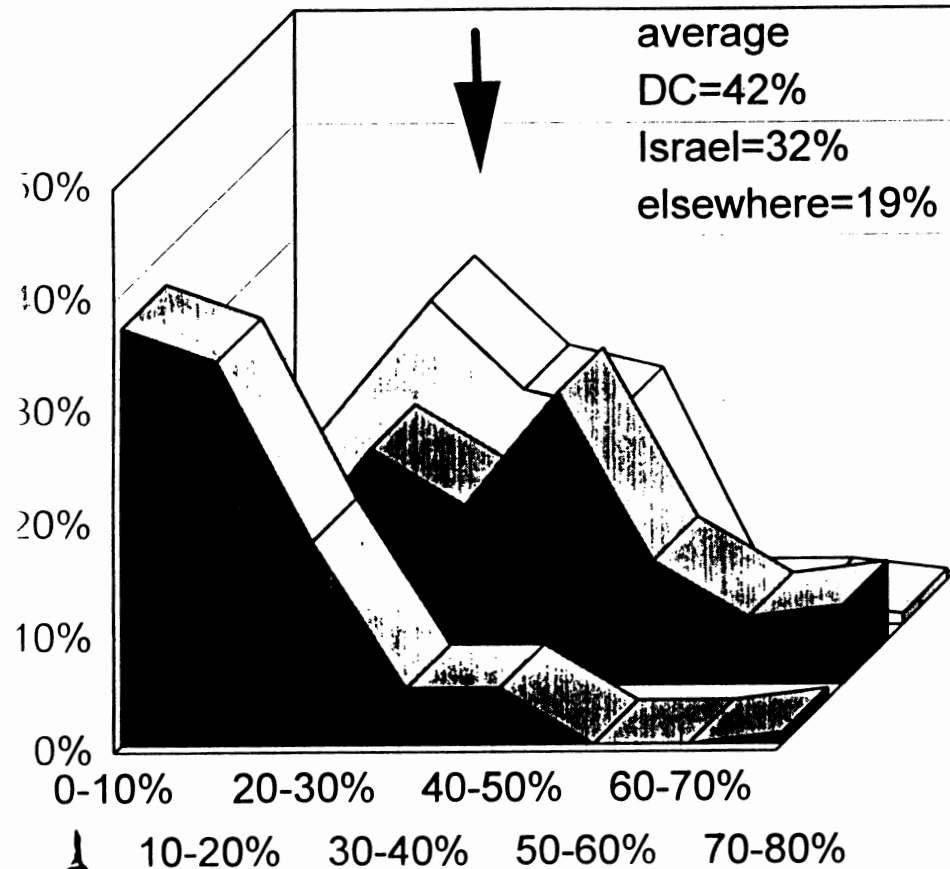
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# While Everyone wants More Money To Stay At Home, High Dollar Donors Are A Bit More Concerned About Sending Money To Israel

low donors (<\$500)

1/20/2008 10:00 AM

high donors (\$1000+)



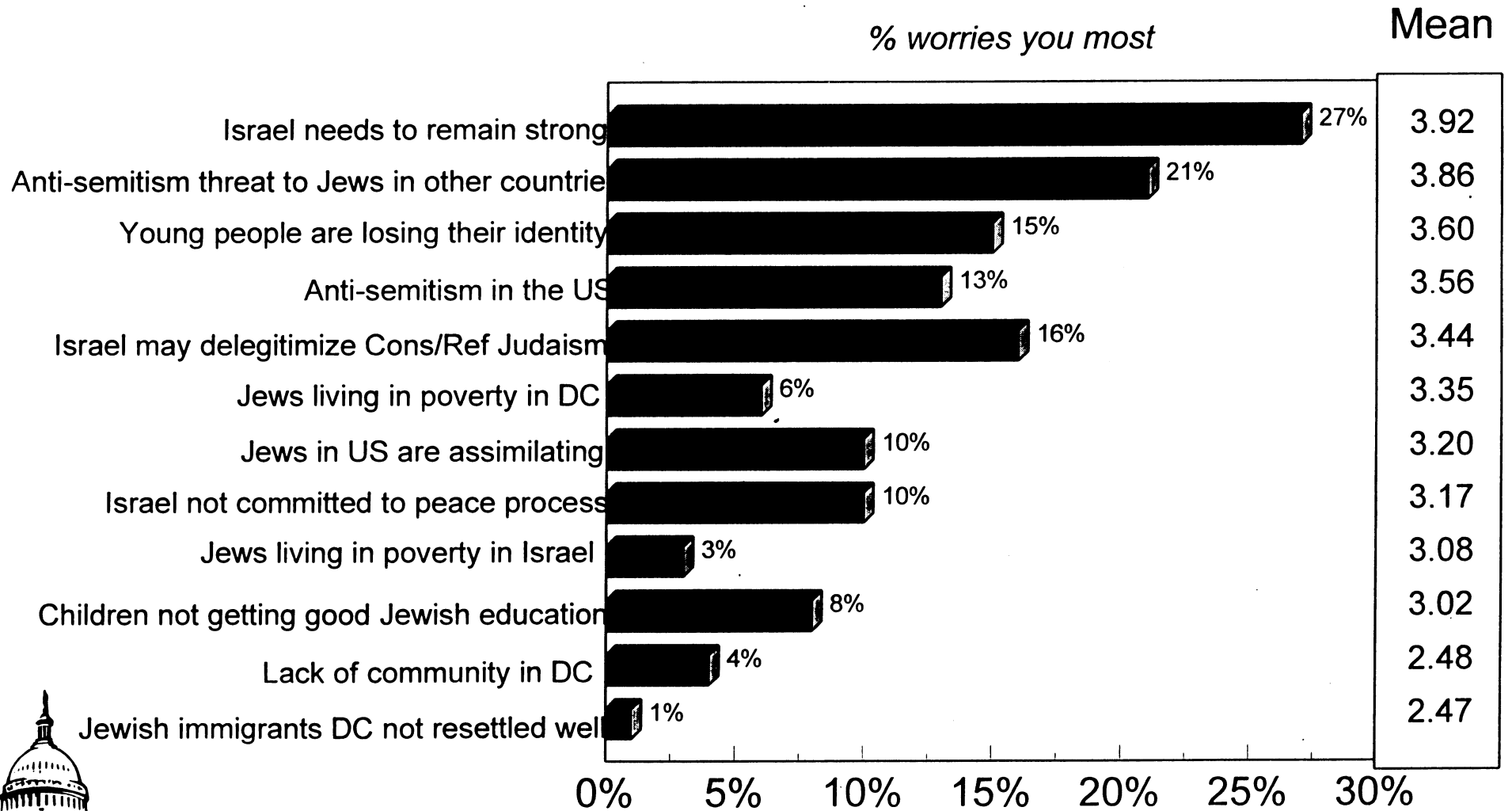
■ other countries ■ DC ■ Israel

■ other countries ■ DC ■ Israel



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# Donors List Israel As Their Top Concern, Though They Are Concerned About A Wide Variety Of Issues



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*rank ordered by mean*



# Participants Explain That A Threat To The Jewish Nation Pulls At Their Heartstrings And Wallets

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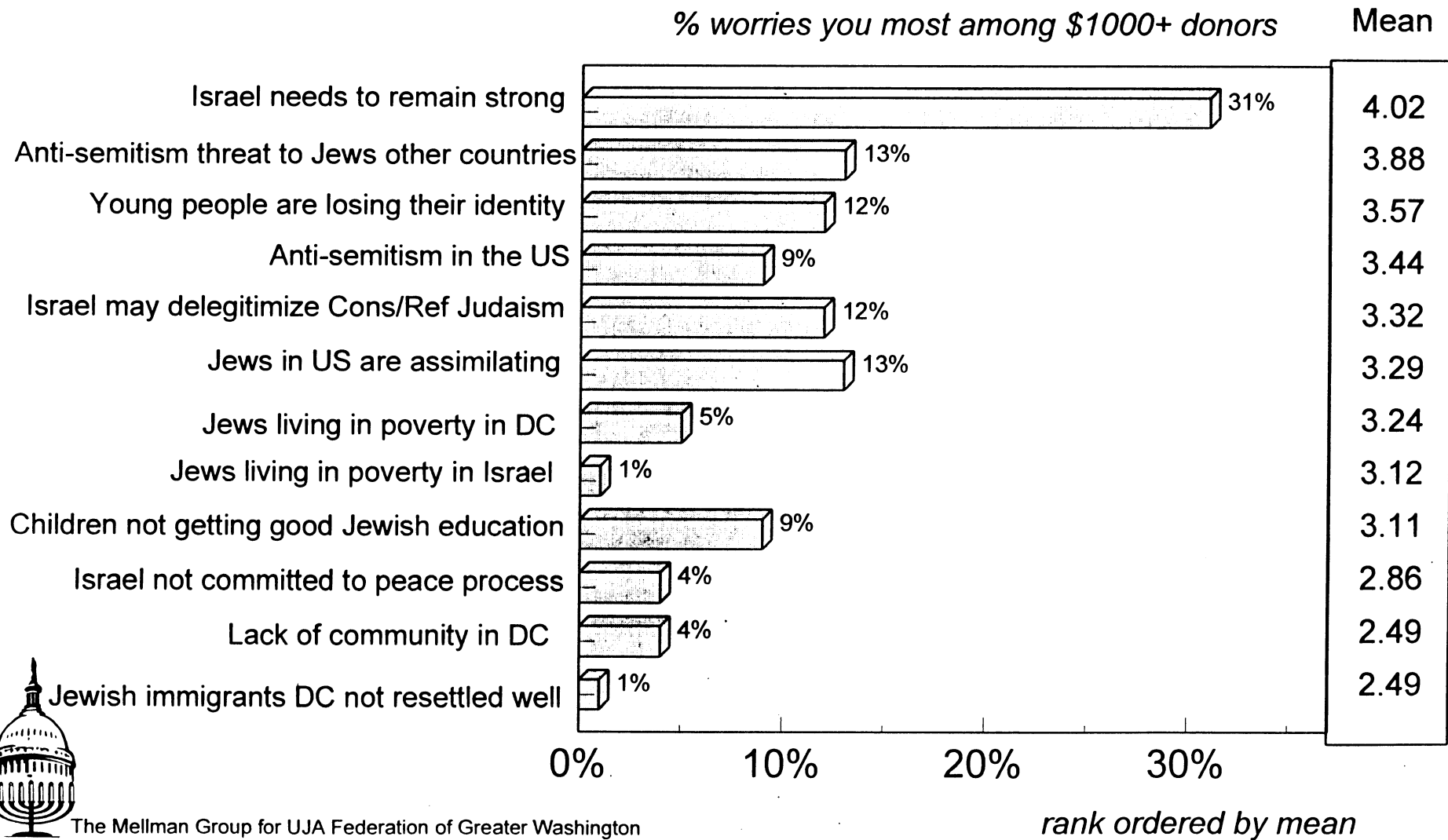
"A crisis."

"Like happened a few years ago when there was trouble in Israel. Everyone was pouring the money in."

"I think that basically, when Israel is not threatened, donations go down."



# High Dollar Donors Are Particularly Concerned About The Jewish State



# Yet They Feel Israel's Economic Needs Have Changed

- My impression is that Israel used to be a poor struggling country that needed us. Now it is a fairly wealthy country doing fabulously. Of course I support them, I buy Israel bonds ... But I don't think of Israel as a country that needs my money so much anymore. (female donor)
- Many years ago I considered making aliyah and at one time I considered Israel the strongest cause for Federation, but I have had a change in that thinking in recent years, probably because of the dramatic growth of the Israeli economy and the success they've had as far as overcoming their military problems. And I now see a shift to focusing on preserving Judaism in this country as a primary goal. (female donor)
- Last year we decided that Israel was fine economically and I am very involved with the disabilities movement and so we chose to give a substantial part of the money we used to give to UJA to disability causes. (female lapsed donor)



No because as the Prime Minister said he wants to make Israel more self-sufficient and not depend on donations or help from other countries as far as being a national economically satisfactory nation. (male lapsed donor)

# Many Want Specifics On How The Money To Israel Is Allocated

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- To give to an organization that funnels an amorphous amount of money for amorphous purposes to a changing entity [Israel] is very difficult. (potential female donor)
- With what's happened election-wise in Israel and the economy booming, I think there's going to be more and more a trend where people will be questioning where their money should be going. That the needs are not the same as they were 20 years ago. And I don't know if the Federation and the Jewish organizations have moved with the times. Maybe they have. Maybe they haven't, but people are questioning more, and this will only become a stronger issue, especially with the dramatic change in Israeli politics. (male donor)
- Well with the present government of Israel, I would prefer that nothing, not much be spent that would in any way credited to the present government of Israel. (male lapsed donor)
- I don't want to give to the political State of Israel. I want to give to help people who live there. (male donor)
- Another thing that we look at sometimes is political issues and we have always been fairly generous with UJA but I am not real happy with this new government in Israel and I'd like to get a little more information about how much of the money you give to UJA is going to end up to support things that I don't like and if that's the case, then I'd be inclined to give locally and then give money to the New Israel Fund or the Jewish Fund for Justice, groups that suit my political needs better. I think it is very hard to get information on that from a group like UJA. It's not if it's a group just devoted to one particular issue. (female donor)



# Factor Analysis Shows Concerns About The Jewish Community Fall Into Three Issue Areas

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## ▶ **SELF-DEFENSE**

- Anti-Semitism in other countries
- Anti-Semitism in the United States
- Israel needs to remain a strong, secure, and vibrant Jewish nation

## ▶ **CONTINUITY**

- Young people are losing their Jewish identity
- Jews in the U.S. are assimilating
- Children are not getting a good Jewish education
- Lack of a cohesive Jewish community in Washington, D.C.

## ▶ **PEACE AND PLURALISM**

- Israel may delegitimize conservative and reform Judaism
- Israel is not as committed to the peace process as it used to be
- Jewish immigrants in Washington are not being resettled well



# Market Segmentation Analysis Reveals That Donors Cleave Into Four Groups

- ▶ **Traditionalists (23%):** These donors are most concerned about issues of Jewish self-defense and continuity, but are not particularly sympathetic to peace and pluralism issues. They are the most active in UJAF and Jewish life. These donors are the most vested.
- ▶ **Committeds (40%):** These donors care deeply about the range of UJAF issues, including peace and pluralism. They are involved in Jewish life, but are less involved in UJAF. They are an excellent expansion target for UJAF.
- ▶ **Self-Defense (19%):** These donors are primarily concerned about issues of Jewish self-defense. A plurality are seniors, and they are the least likely to increase their contribution in 1997.
- ▶ **Progressive At A Distance (18%):** These donors are more concerned about peace and pluralism, but are not as deeply concerned about any of UJAF's issues. They are disproportionately single urban dwellers. They are the most charitable of the clusters, though they are not generous donors to UJAF.



# Traditionalists (23%)

## Concerned About Self-Defense And Community Preservation, But Not About Peace & Pluralism

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### ■ Demographics

- 53% are men
- Average age is 57 years old
- 77% are married, 11% are widowed
- 30% have children living at home
- 23% have household incomes of above \$150K
- 35% give between \$1000 and \$5000 to charities annually
- 39% have lived in the DC area between 16 and 30 years

### ■ Media Outlets (% who listen, read or watch most of the time)

- 61% Washington Jewish Week
- 32% WTOP
- 17% WAMU
- 57% synagogue newsletters
- 39% JCC newsletters



# The Committeds (40%)

## Care About All Issues, Most Of All Self-Defense

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### ■ Demographics

- 58% are women
- Average age is 58 years old
- 80% are married
- 29% have children living at home
- 22% have household incomes of above \$150K
- 38% give between \$1000 and \$5000 to charities annually
- 35% have lived in the DC area between 16 and 30 years
- 75% live in Maryland

### ■ Media Outlets (% who listen, read or watch most of the time)

- 53% Washington Jewish Week
- 31% WTOP
- 26% classical music stations
- 53% synagogue newsletters
- 29% JCC newsletters
- 26% The Washingtonian





# Self-Defense (19%)

## Care Only About Self-Defense Issues

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### Demographics

- 49% are men
- Average age is 62 years old
- 69% are married; 9% are divorced
- 19% have children living at home
- 18% earn between \$60K and \$80K
- 37% have lived in the DC area for over 40 years

### Media Outlets (% who listen, read or watch most of the time)

- 38% Washington Jewish Week
- 30% WAMU
- 40% classical music radio
- 36% synagogue newsletters
- 21% JCC newspapers
- 31% The Washingtonian



# Progressive At A Distance (18%)

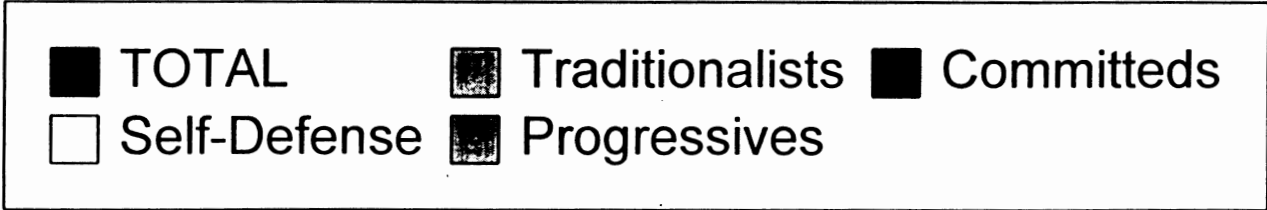
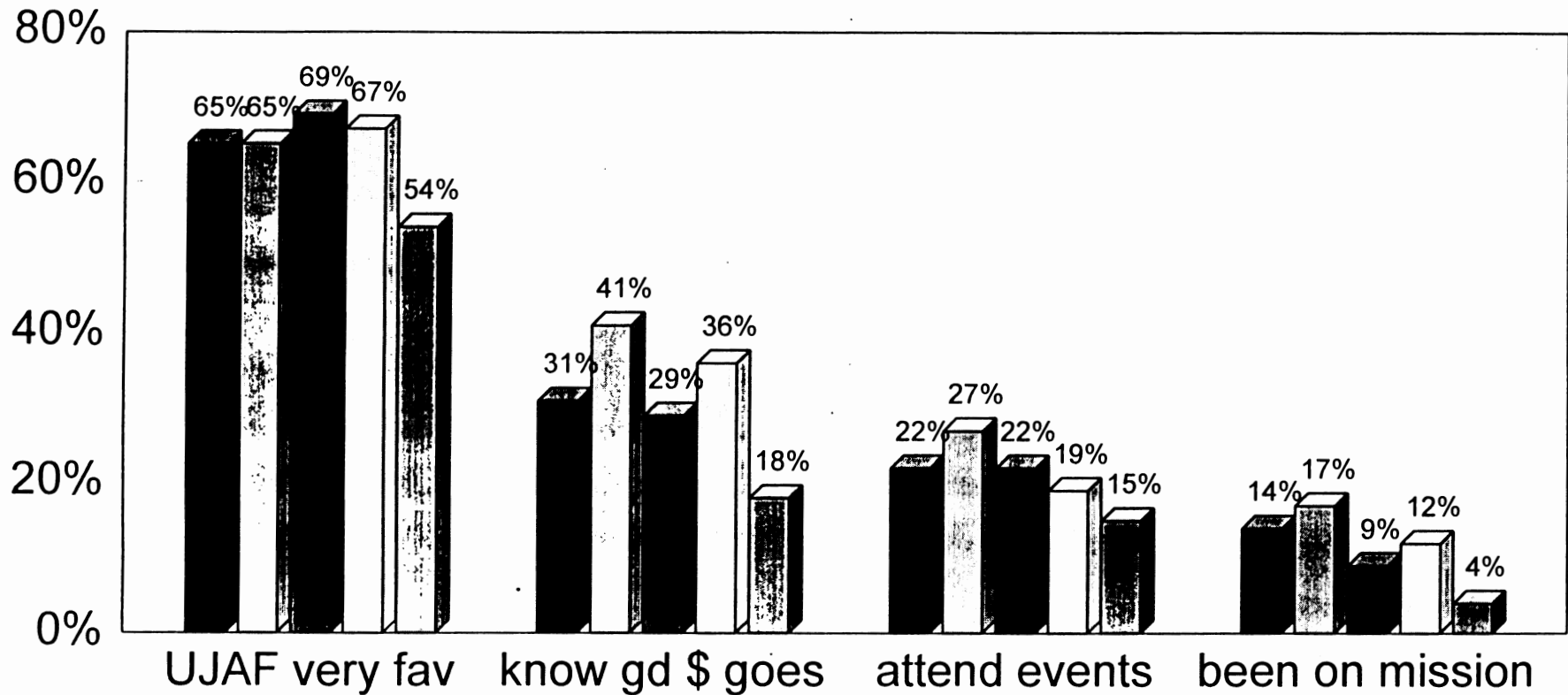
## Most Concerned About Peace & Pluralism, But Not Very Concerned About Any Issue Group

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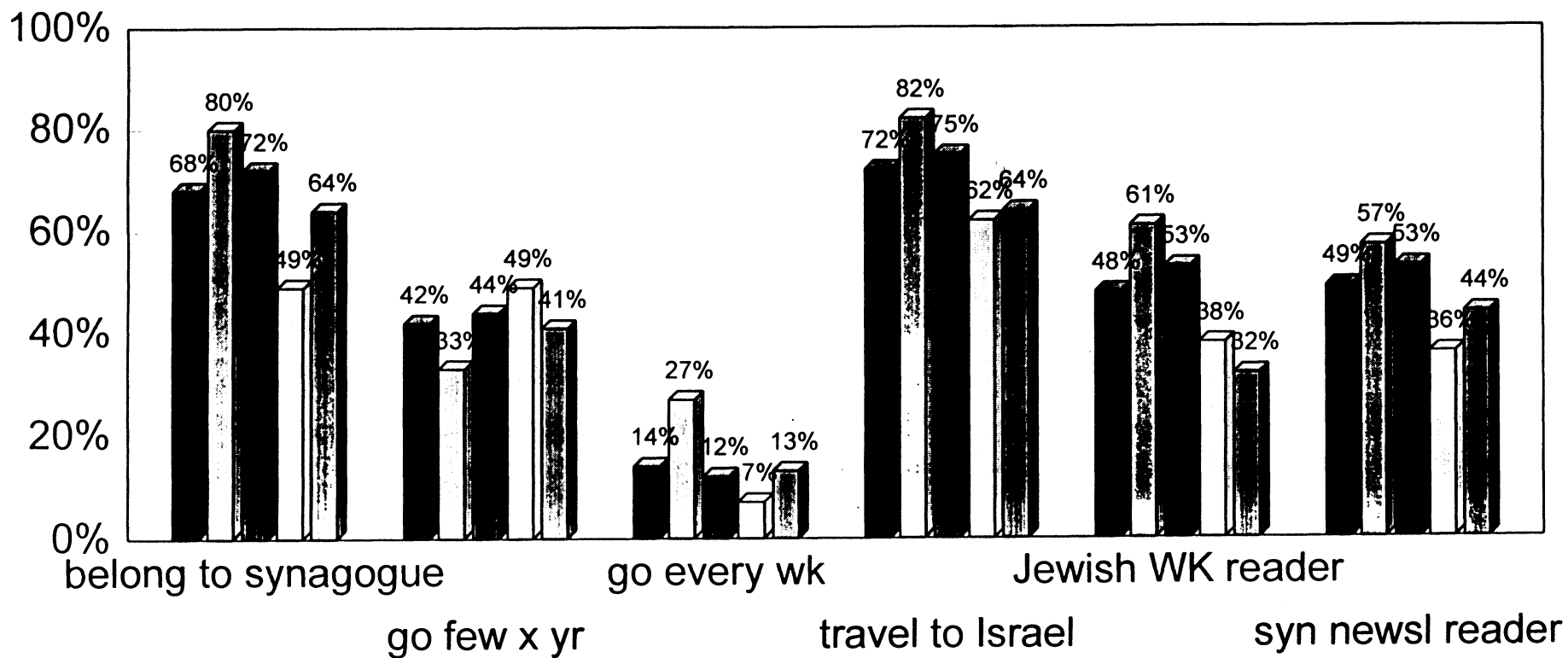
- Demographics
  - 51% are men
  - Average age is 58 years old
  - 70% are married; 14% are single
  - 18% have children living at home
  - 18% earn between \$60K and \$80K
  - 40% give between \$1000 and \$5000 to charities annually
  - 33% have lived in the DC area between 16 and 30 years
  - 20% live in DC; 19% live in Virginia
  
- Media Outlets (% who listen, read or watch most of the time)
  - 32% Washington Jewish Week
  - 21% WTOP
  - 37% classical music stations
  - 11% country music
  - 44% synagogue newsletters
  - 13% JCC newsletters



# The "Traditional Concerns" Cluster Is Most Active And Informed About UJAF



# They Are Also The Most Active In Jewish Life

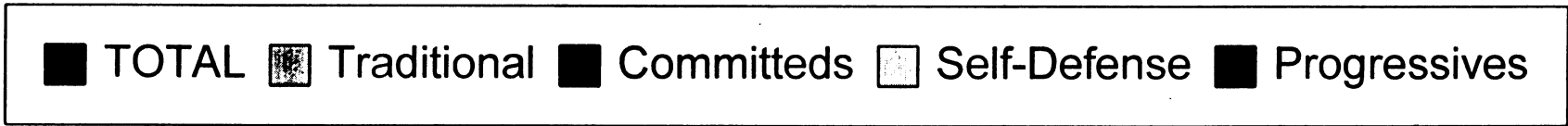
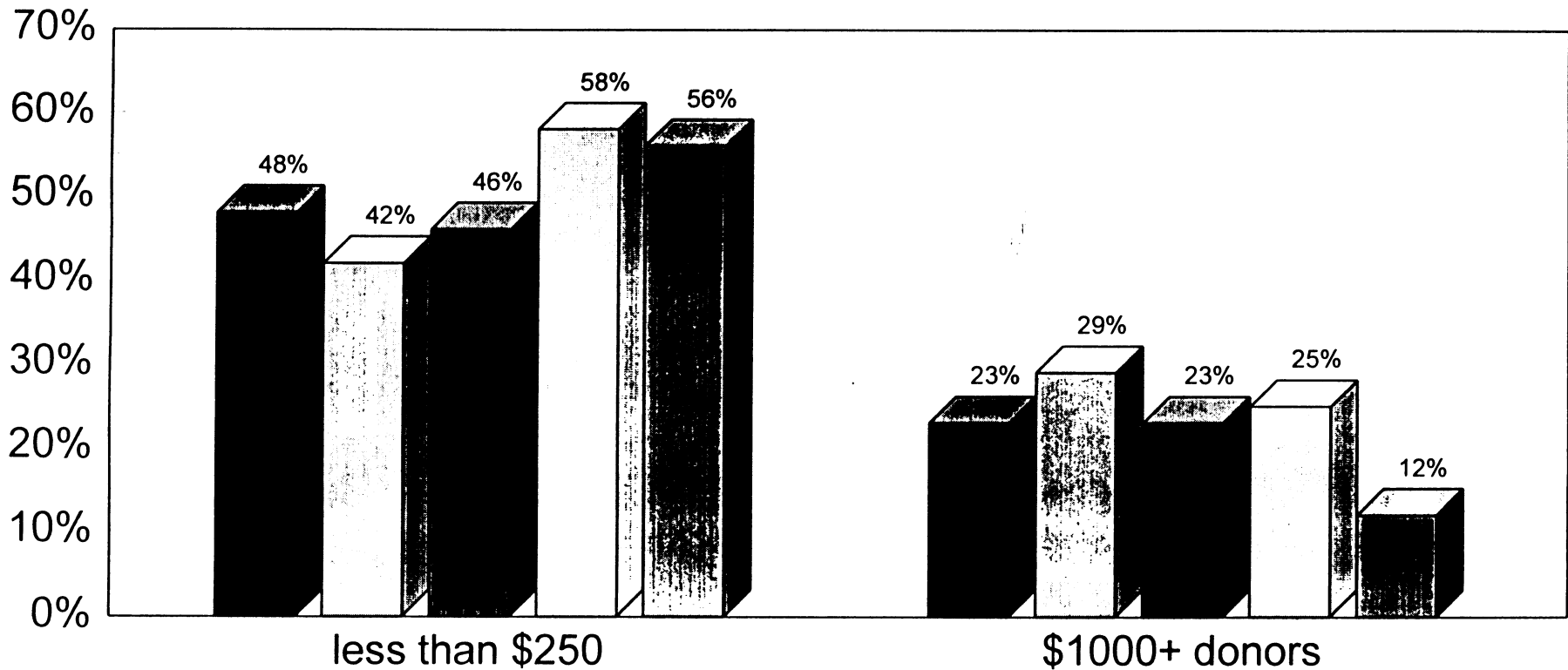


TOTAL
  Traditional
  Committeds
  Self-Defense
  Progressives



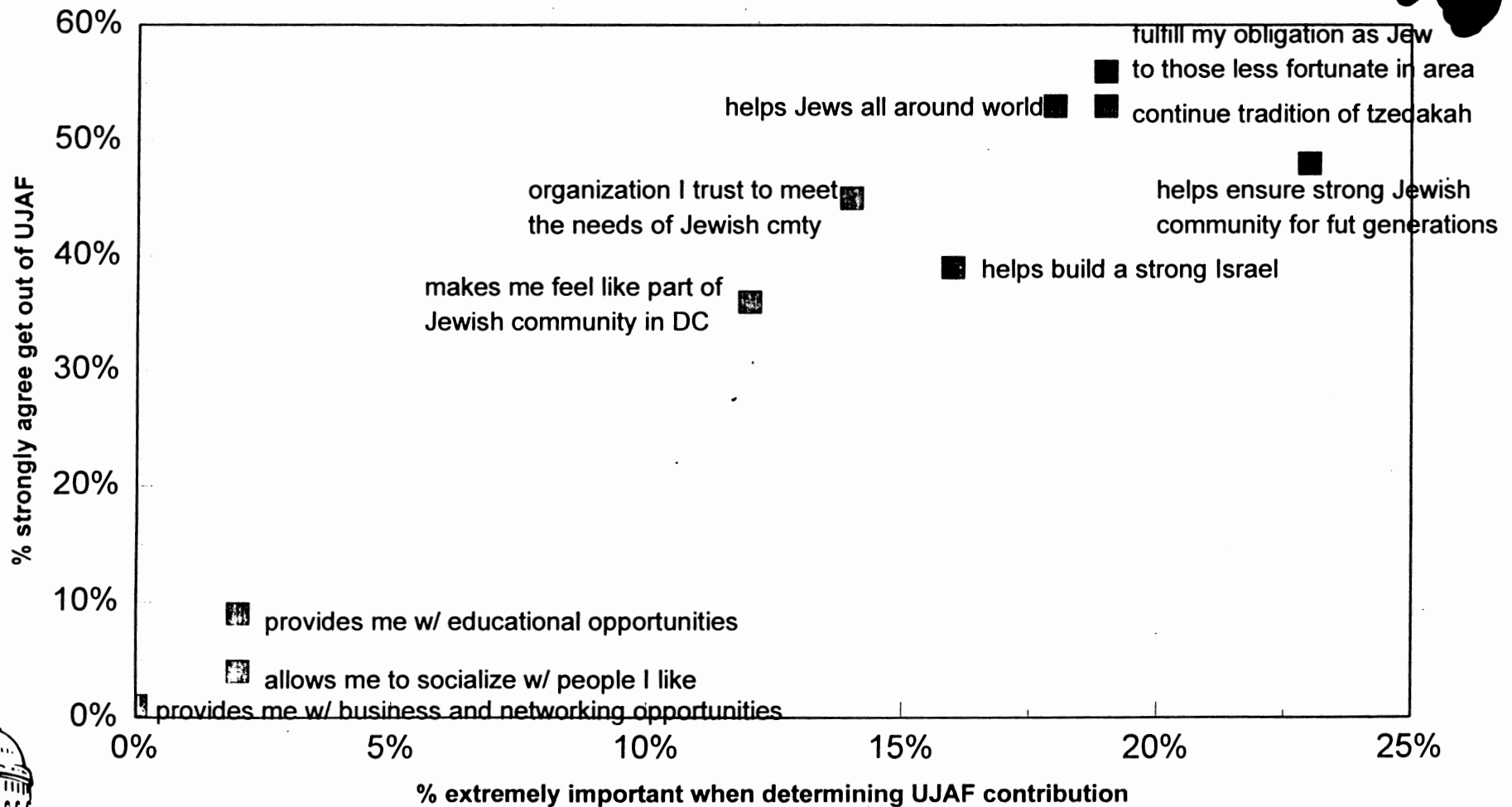
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# The "Traditionalists" Are Slightly More Likely To Be High Dollar Donors, While "Self-Defense" and "Progressives" Are More Likely To Give Smaller Amounts



# Tzedakah, Continuity And Helping Jews Around The World Are The Primary Reasons That People Contribute To UJAF

Communal Opportunities Are Not Seen As UJAF Benefits



# Focus Group Participants Explain That Tzedakah Is Not Only A Core Value, But A Source Of Pride

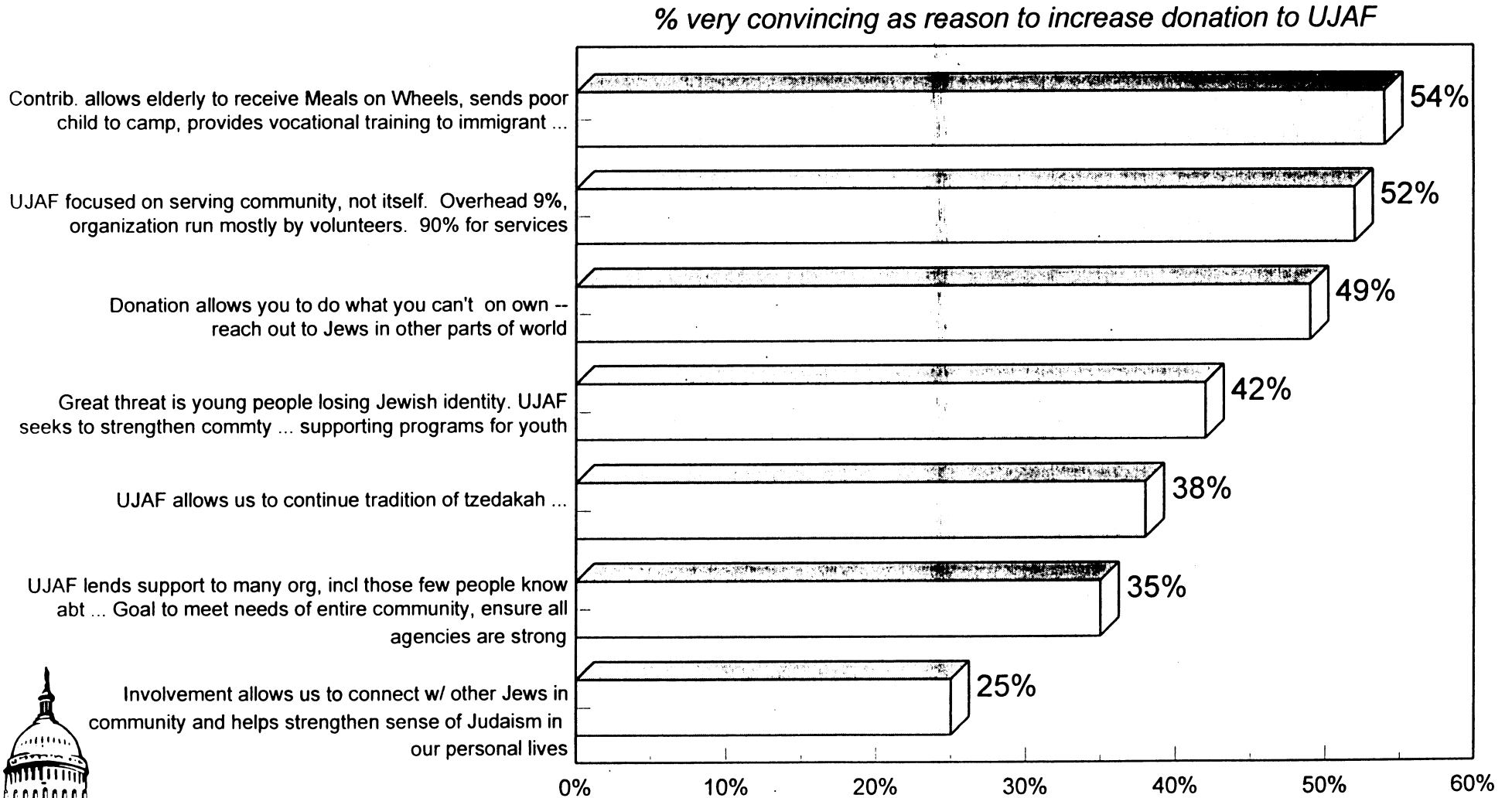
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- To me it in part at least fulfills an obligation. I think that it's something that my parents always did and participate strongly in that respect. It seems like it's something that it's part of being Jewish is that you have to help out those and help support the community. (male donor)
- I think there's a great pride in the giving of the Jewish people ... the Jews give more money than anybody. The United Jewish Appeal raises more money than almost anybody. The only one that might beat it is the United Way. And the response of what is less than three percent of the population in this country and the giving is absolutely incredible, and we're all taught that no matter how poor. (male donor)
- Our Judaism teaches us to help others less fortunate. (male donor)
- It's what Judaism's all about. (male donor)
- I saw it positively too as a tradition of Tzedakah, the Jewish idea of renewal and possibility, and part of the meaning of Judaism is seeing the world as possible to change and improve. (male potential donor)



# Highlighting Specific Examples Of UJAF Services, Low Overhead And UJAF's Ability To Help Jews In Other Parts Of The World Are The Strongest Messages

Building Community And Strengthening Judaism Are Least Effective



The Mellman Group for UJA Federation of Greater Washington



# Specifics Are Critical Because They Personalize UJAF Services And Show Donors' Dollars At Work

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- I think that the specific examples are important and if they can be beefed up, then that's kind of what's important, because some of this general fluff. I think people can understand and relate to bringing kosher meals to elderly people who can't get out of their house. Or the Jewish Community Center, giving them rides so they can really enjoy some of the senior years. And the Israel Quest program is a tremendous program and so just adding more detailed things like that I think is more important than some of the fluff. (male donor)
  
- And it has got to really give out the information. Be very specific and give case histories and things like that. (female donor)
  
- I think you need examples. I don't know whether this is all puffery, I don't think it is, I think a little bit of it is, but if you had examples for some community action and some Israel programs and some educational programs ... (female donor)
  
- I like to look at a face, I think most people do and you like it when you can identify with it, say oh yeah, I know about that program and somebody's mother was in the Hebrew Home and -- (female donor)
  
- It quantifies it. It's informative, and it hits specifics and it tells you what I think I want to hear about the kinds of things it does. (male donor)
  
- If it's possible for real testimony of things, either people or organizations who have benefited. I don't know how private that is. I don't know any of the rules and regulations about that, but if there's some organization that's benefited in a certain way. "With UJAF's help, we accomplished X. We built this," or "funded the other." Something real. (male potential donor)



# In The Focus Groups, Examples Of How UJAF Reaches Out To Jews All Over The World Were Particularly Attractive To Potential Donors

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Although this feels to me a little bit more because when we talked just a minute ago about having specific places and just bypass the middleman and go, I can't really jump over to Yugoslavia and give somebody a check. So this is probably a little bit more appealing for a reason to give to UJA, because it's something I can't really affect. (potential male donor)

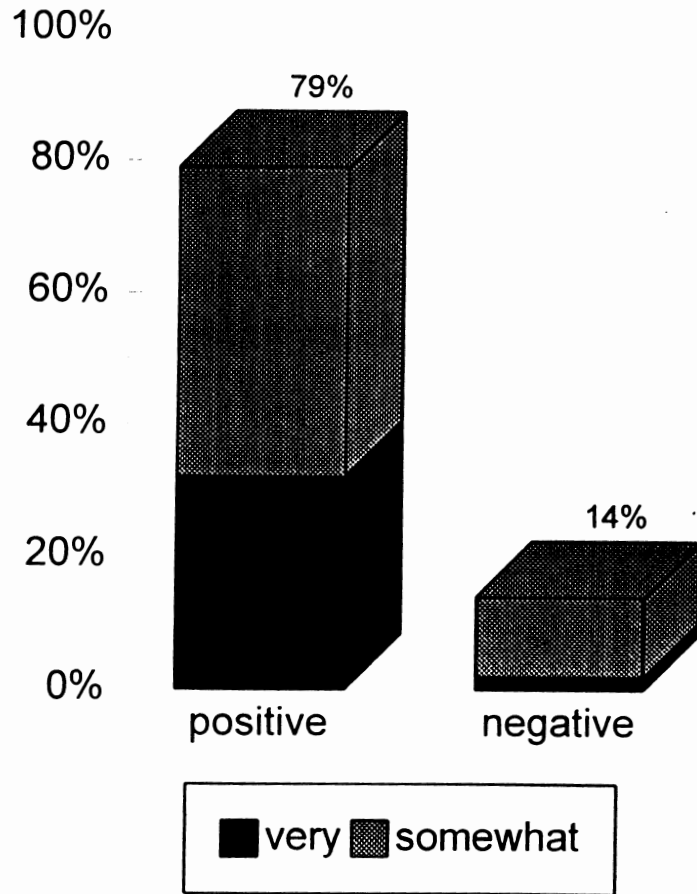
I like this one better than the last one. And I think it's for the same reason Rob's saying. Jews caught in the crossfire in the war in Yugoslavia, yeah. There's no way. How would I be able to do it? I think in anything that's written, specifics are always good. Sometimes I think those stories about people just get to be a little bit much, but other than that, there's nothing on this page, there's nothing here that really I need to circle. (potential female donor)

And I found reading this, the business about Yugoslavia and anti-Semitism and Russia, those were two of the images that were most compelling to me. When I see those people cut off, alone and in trouble, that's my personal reaction. (potential male donor)

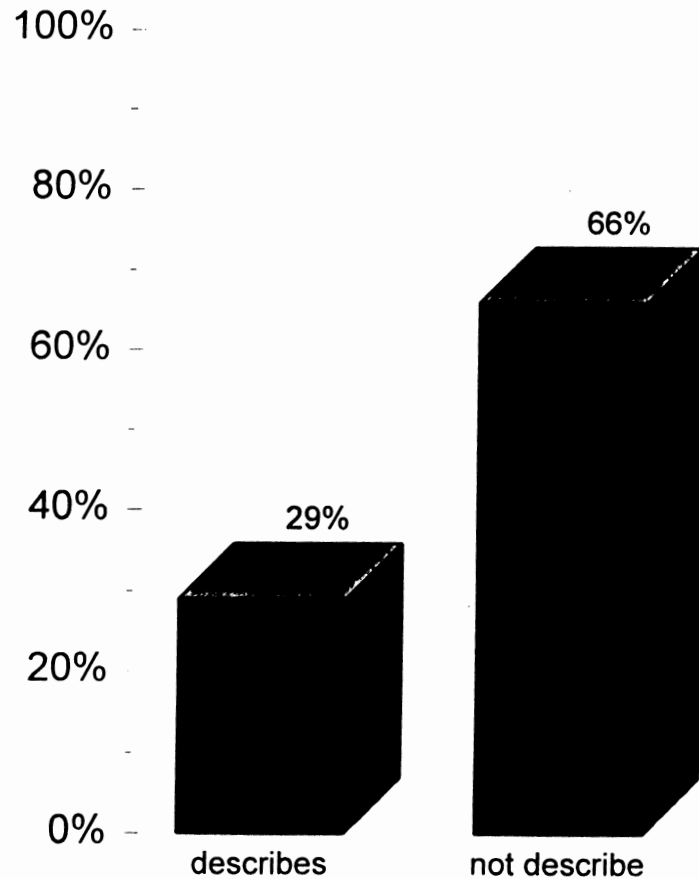


# Few Have Had A Negative Solicitation Experience

Have your solicitation experiences been positive or negative?

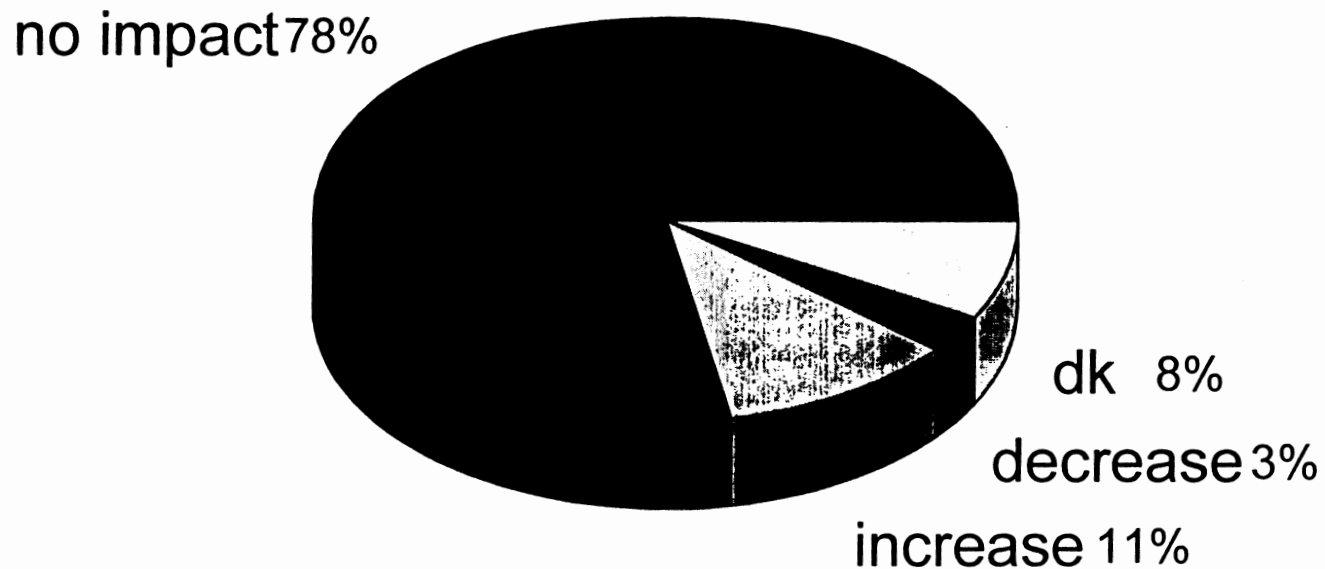


How well does "has pushy solicitors" describe UJAF?



# The Solicitation Process Seems To Have Little Negative Impact On Giving Among Donors

*Did solicitation exp impact amount of your gift?*

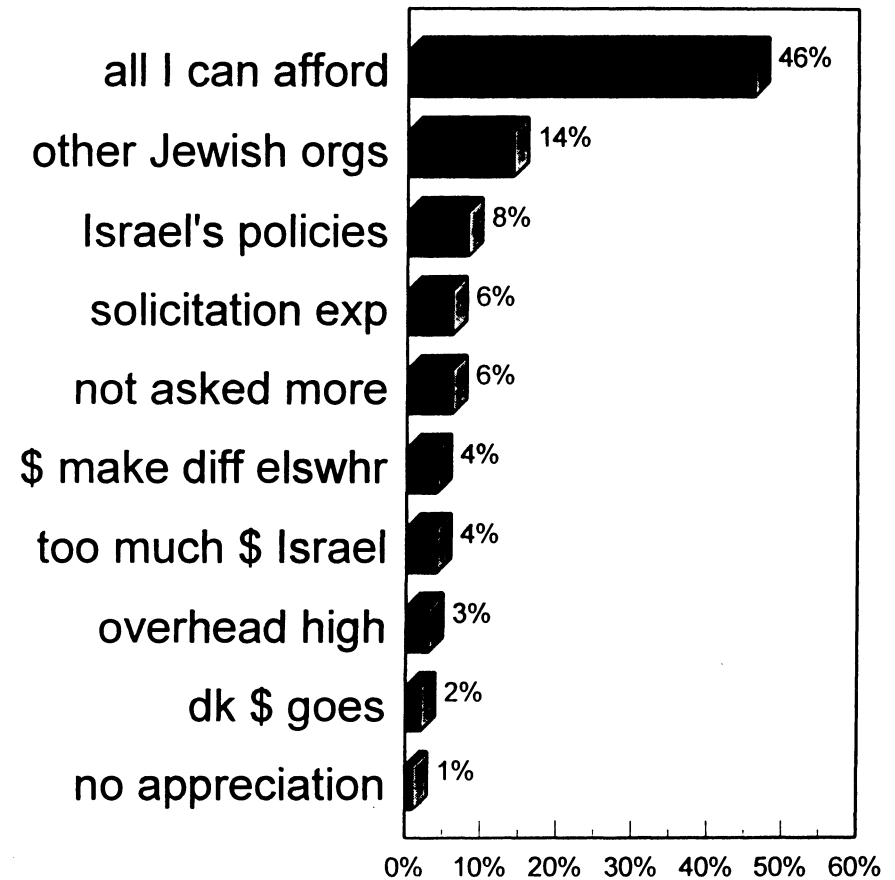
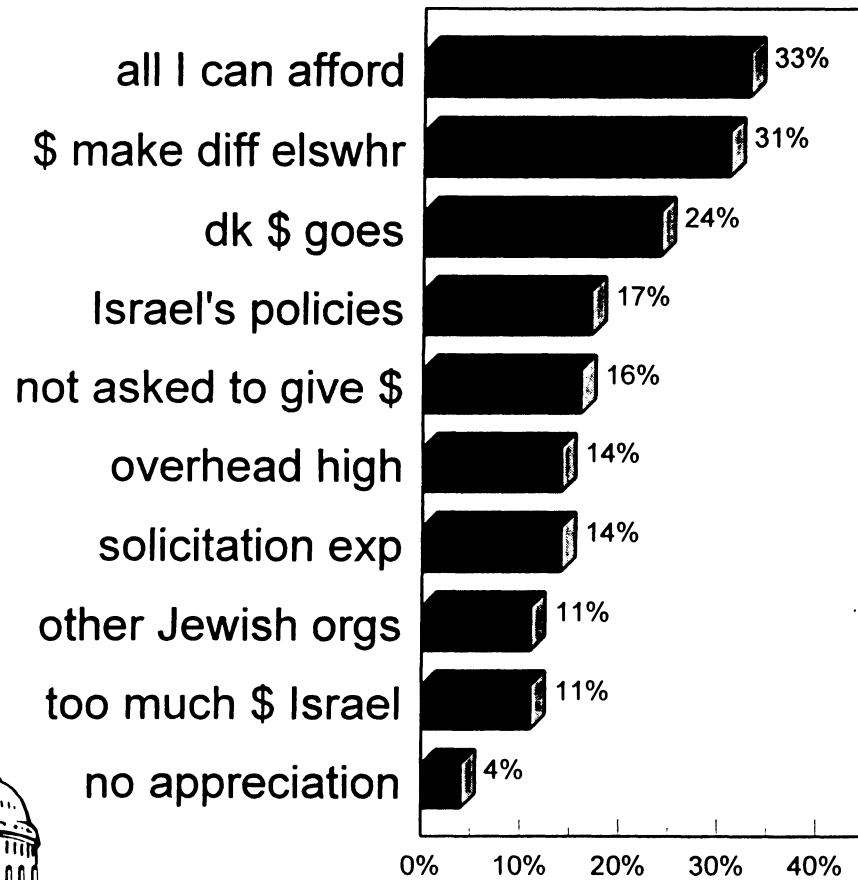


# Solicitation Experiences Are Not A Major Cause Of Flat Or Declining Giving

*% saying describes "very well" why ...*

*reduce/not contribute (n=26)*

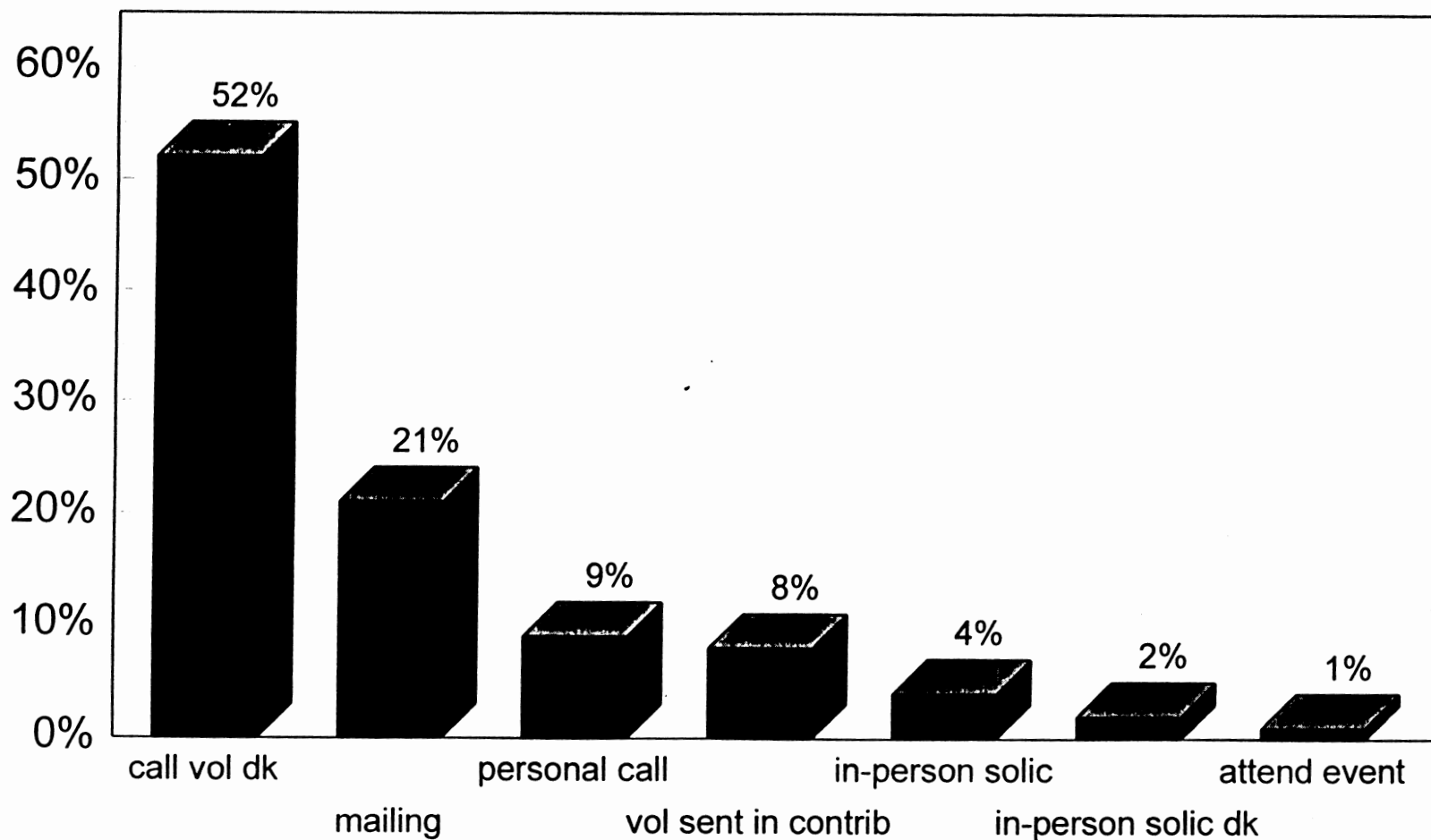
*donation stay same*



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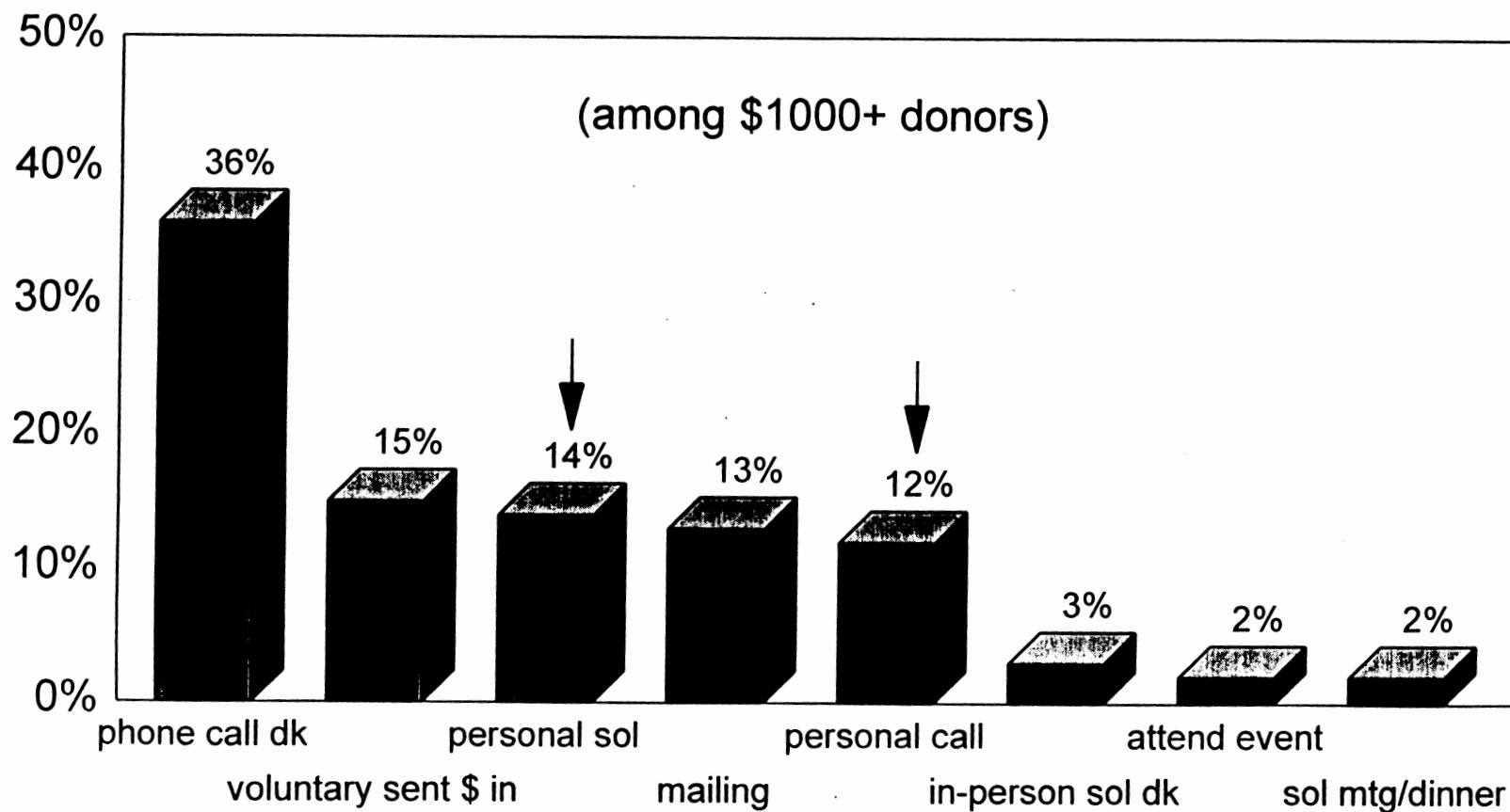
# Half Have Been Solicited By A Volunteer They Do Not Know Over The Phone While Few Are Solicited In A Personal Way

*way usually solicited for donation*



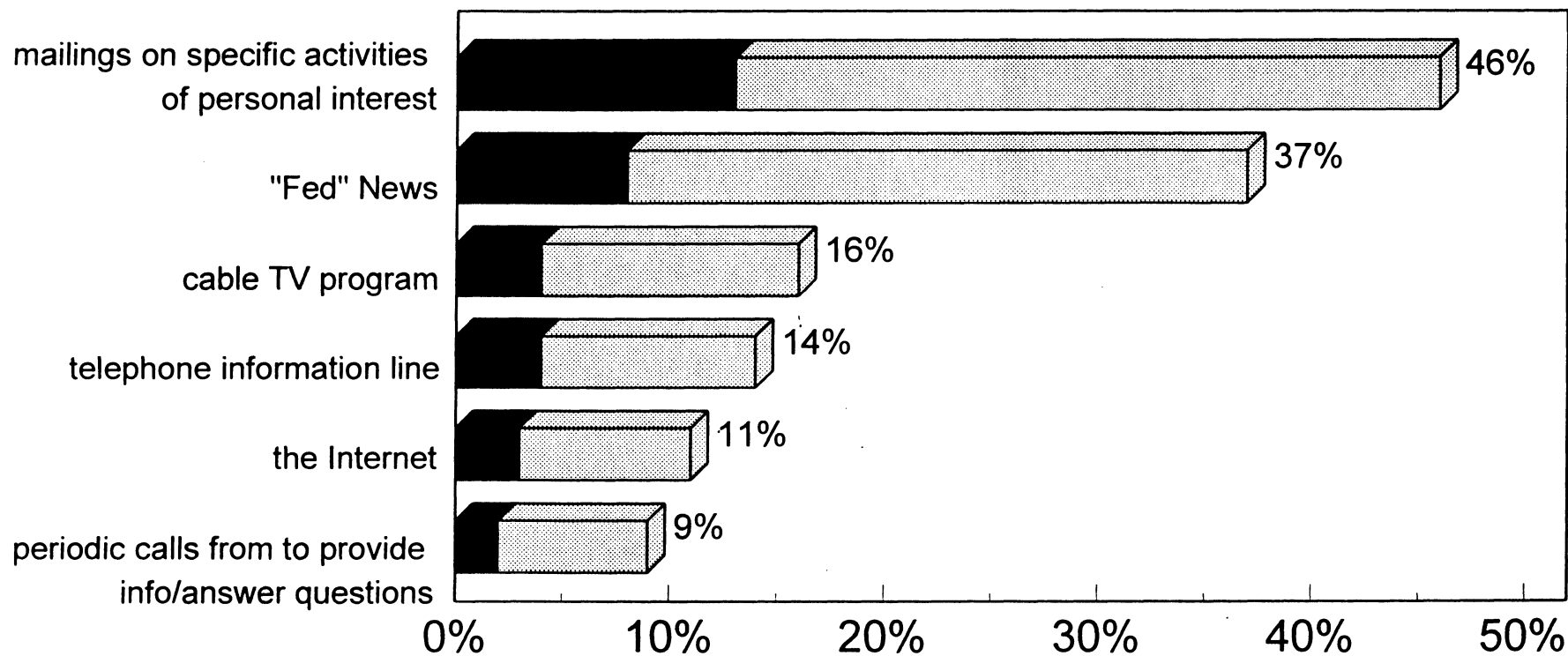
# Even High Dollar Donors Are Not Being Solicited Personally

*% being solicited by particular method*



# While None Of The Proposed Communication Vehicles Elicit Strong Interest, More Would Pay Attention To Targeted Mailings

*different ways UJAF might communicate with/inform donors*



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■ almost certain    ▨ very likely



# Respondents Explain That They Want To Hear About Their Particular Interests

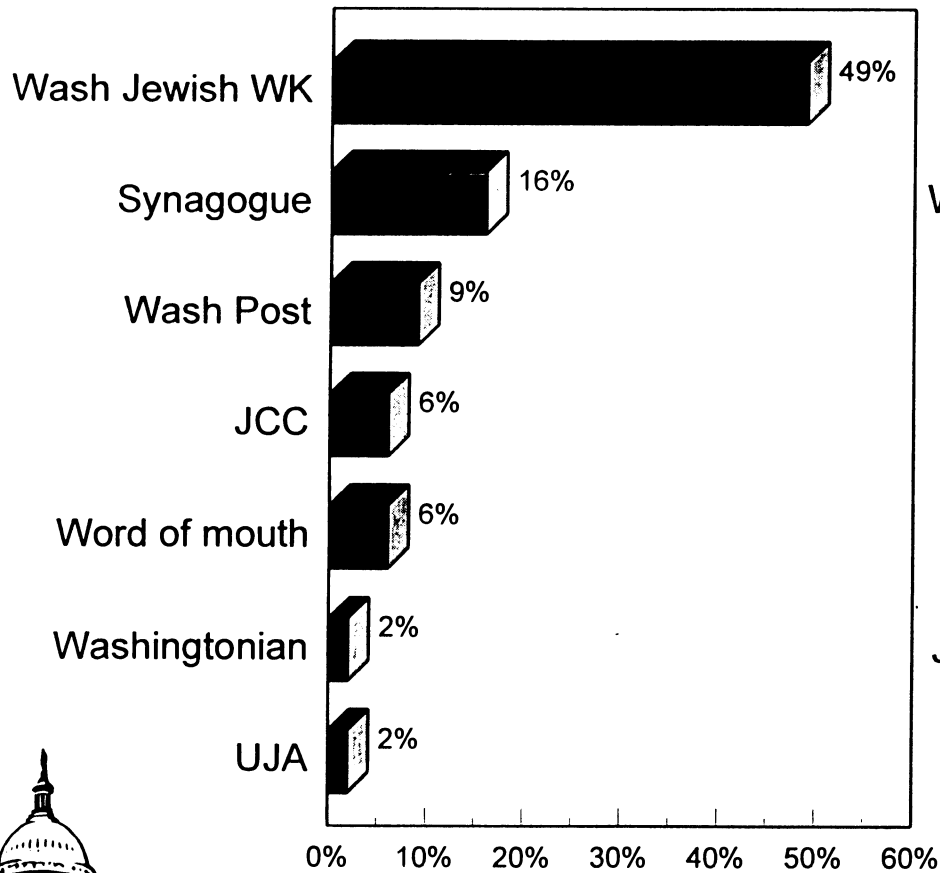
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- ❑ Now the issue is that you need to do some marketing and have different letters going to different people who you know what's going to hit their heat. (potential female donor)
- ... most of the people here when asked who would they give to and under what circumstance seemed to me were saying, "I want to know where it's going. I want to know it's something of interest to me." That statement is the exact opposite of that. (potential male donor)
- Maybe using three specifics for everybody is too broad and insults somebody, so maybe you need to do marketing and say, "This is going to this group and this is what heartstring you need to hit." Or "This is going to that group and this is what heartstring you need to hit," because something else is going to hit everyone of us. (potential female donor)
- I think everyone has different priorities and I think if you go around the table, everyone here would have a different priority ... They should market to that person so they don't turn off the next person ... Maybe it's so broad ranged they need to have different areas. (potential female donor)

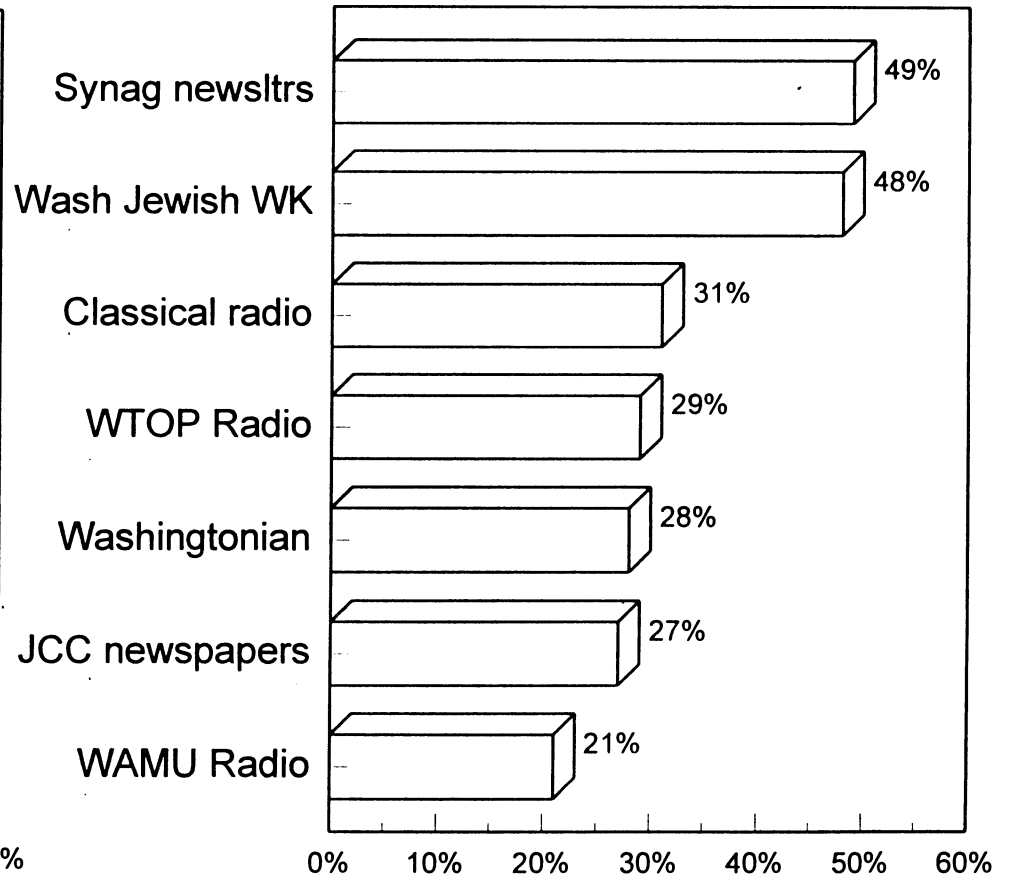


# Washington Week and Synagogue Communiqués Are Donors' Primary Source Of Information And Important Resources For UJAF

*Primary source of news abt local Jewish issues*

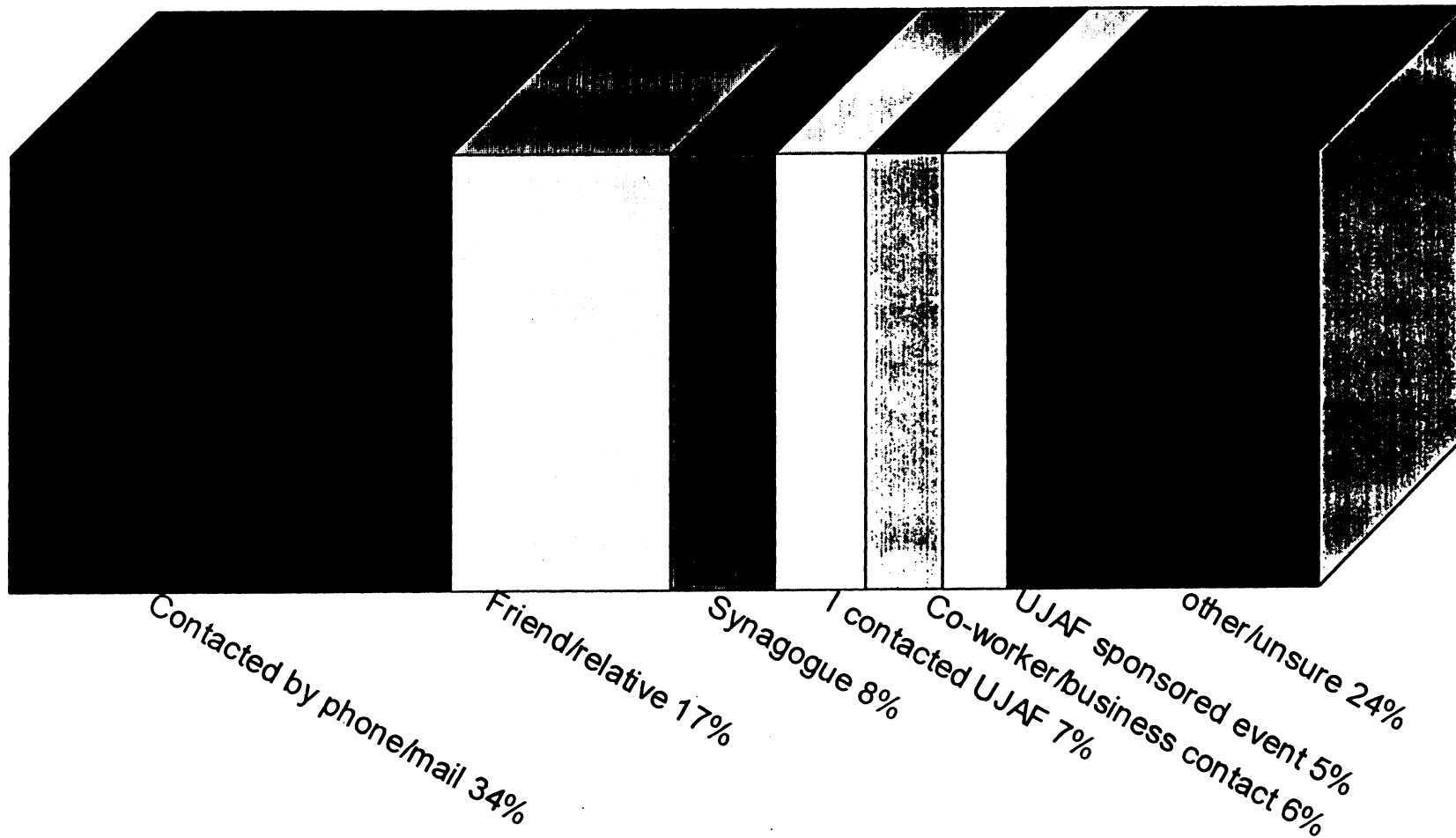


*% listen/read most of time*



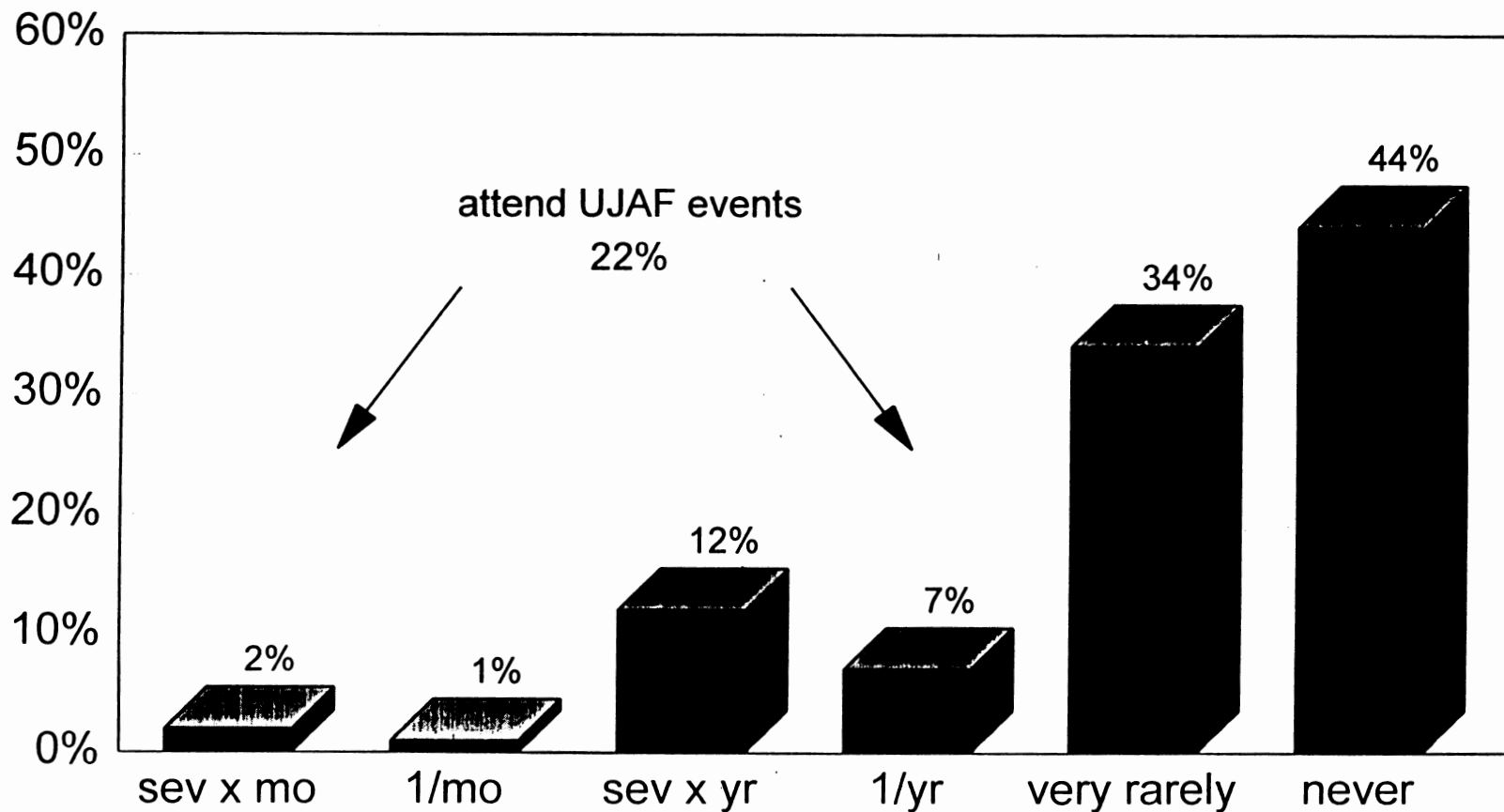
# A Plurality First Became UJAF Contributors Through Phone Or Mail Contact; The Fewest Through UJAF Sponsored Events

*How first became UJAF contributor*



# Fewer Than A Quarter Of These Donors Attend UJAF Events Even Once A Year

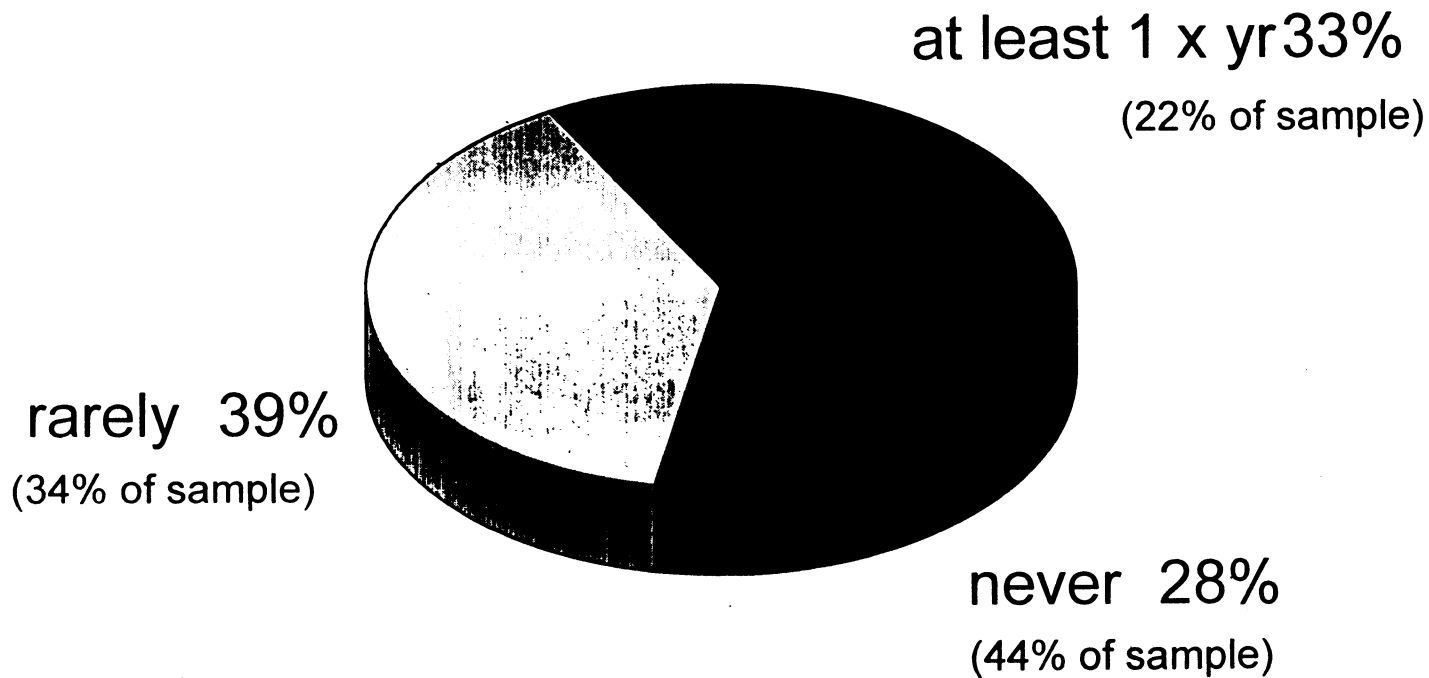
How often do you attend UJAF events?



# Although Less Than A Quarter Of Donors Attend Events, Attendees Give Disproportionately More

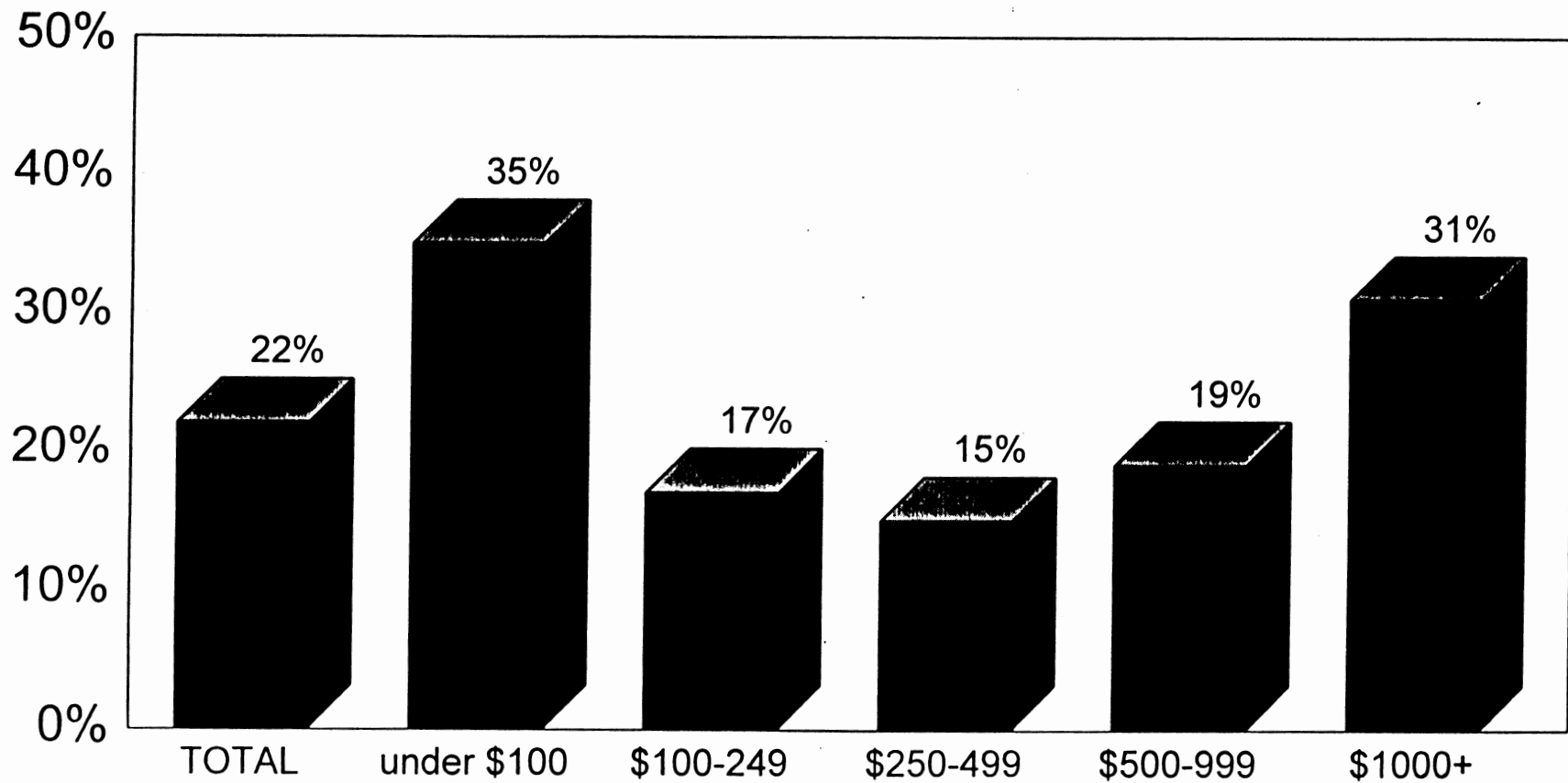
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*% of total contributions by attendance*



# The Lowest And Highest Dollar Donors Are The Most Likely To Attend UJAF Events

*% attend UJAF events at least once a year*



# Many See These Events As A Fundraising Trap Or A Poor Allocation Of Resources

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- ❑ Another thing, I get invited to teas, lunches, brunches, parties, balls, and I have given my annual contribution and these are more and I hesitate going because I know it is going to be a fund raiser. I came almost kicking and screaming to this because I thought the hat would be passed around. (female donor)
- ❑ I personally hesitate to participate in teas, lunches, brunches, power meetings, because I think it's a ruse to more fund raising. (female donor)
- ❑ And as I said, to know that my money will also be spent on social events that I am not interested in attending or sponsoring, why would I want even 50% of my money to go to that? (female lapsed donor)
- ❑ I am not interested in going to the balls and things of that sort. That is not my thing ... (male donor)
- ❑ ... when I get their literature, I don't even read it. In the first place, it's too social. I feel like I'm reading a synagogue newsletter and I'm not interested in that, whereas other things I give to, I read religiously. I feel more identified. (male lapsed donor)



# Potential Donors Suggest That Putting A Dollar Amount On Event Invitations Sends The Message That UJAF Only Wants Big Donors Involved

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- It's rooted in their functions that you get invited to. To go to this function you need to give a 150 dollar annual contribution or to go to this you need to give a 500. That's sort of just saying you're not good enough if you can't give this. (female potential donor)
- ... with UJA there's a sense that they're looking for the big hitters, the big machars, the big bucks and they don't really appreciate a 50 dollar contribution if that's what you want to do, because you're doing 10 other contributions. If there were a greater sense that there was an issue of community and that smaller contributions were welcome -- at least they're welcome when you can make small ones and maybe sometime later on you'd make a larger one when you could. At least for myself I think I would have emotionally a better reaction to it if participation rather than amount were the basis of the pitch. (male potential donor)
- I think one thing it means, because I said that, is that contributions that aren't say 500 dollars and above aren't really very well received. My sense is that it's aimed at people who are at a stage in life where they can make major contributions, just the image of that ... (male potential donor)





# RECOMMENDATIONS

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## SOLICITATION:

- ✓ Focus on baby boomers who give large gifts and provide young(er) blood
- ✓ Stop treating the community as a single mass market. Individualize and customize appeals to donors' individual interests. Develop a phone and/or mail canvass project out of which to build an individualized database
- ✓ Personalize donors' relationship to UJAF and the impact of their dollars
- ✓ Consider an automatic monthly payment plan to capture ongoing dollars from donors who think they are giving but are not
- ✓ Increase use of direct mail fundraising for low dollar donors
- ✓ Increase personal solicitation of high dollar donors
- ✓ Reconsider role and ubiquity of minimum gift events



# RECOMMENDATIONS

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## MESSAGE:

- ✓ Communicate where the money goes in specific vignettes over and over again. Put a face on the end benefit
- ✓ Individualize the vignettes to the extent possible
- ✓ Communicate that the allocations process is bottom up; coming from the community itself
- ✓ Tap into core values like tzedakah
- ✓ Highlight low overhead
- ✓ Washington Jewish Week remains a good vehicle for communicating the right message
- ✓ Some mass media like WTOP may be an effective adjunct

