

THE SACRED TASK OF CONGREGATIONAL FUNDRAISING -  
ORGANIZATIONAL STEPS FOR A SUCCESSFUL  
CAPITAL AND ENDOWMENT CAMPAIGN

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The Lord spoke to Moses saying: “Tell the Israelite people to bring me gifts; you shall accept gifts for Me from every person whose heart so moves him. And these are the gifts that you shall accept from them: gold, silver and copper; blue, purple and crimson yarns, fine linen, goats’ hair; tanned ram skins, dolphin skins, and acacia wood: oil for lighting, spices for the anointing oil and for the aromatic incense; lapis lazuli and other stones for setting, for the ephod and for the breast piece. And let them make me a sanctuary that I may dwell among them. Exactly as I show you-the pattern of the Tabernacle and the pattern of all its furnishings-so shall you make it.”

Exodus 15:1-9

This section of Exodus then continues on with an exhaustive and complete description of both the construction dimensions and material specifications for the Tabernacle. This is an incredible section of Torah with volumes of commentary having been written on its meaning. This section of Torah in so many ways captures the important themes of this paper.

1. Moses, many commentators have said, may, in fact, have been the first fundraiser for the Jewish people. God instructs Moses to collect various gifts from the people to be brought to God.
2. There is, in fact a specific purpose for the gifts that Moses is requesting of his people. The goal is to ultimately have the people construct a sanctuary for God, so God may dwell among them.
3. The specifications and materials are extremely detailed because this project requires planning and organization, to be done properly.

History teaches us the importance of fundraising as well as the critical and necessary steps to insure the success of our efforts. So many synagogues today are raising funds to renovate existing facilities, to build new ones, or to secure the institution’s future finances and mission through an endowment fund, to truly fulfill the edict of building a sanctuary where God may dwell. This concept has troubled many scholars who have been taught that God is experienced in so many different ways and that there is no exclusive place for God. However, tradition has also taught us that we create religious sanctuaries out of a need for beautiful and inspiring environments where we can find moments for reflection, comfort and hope in difficult times, direction and wisdom when we face moral choices, and beautiful rituals with which to celebrate the most important moments of our lives. Our sanctuaries provide us with spaces where we can share with others and sense the support and enthusiasm of a community. As the early rabbis taught, our sanctuaries answer our human and spiritual needs. Rabbi Samson Raphael Hirsch teaches us that the sanctuary (or synagogue) is much more than a building; it is a symbol reminding Jews of the covenantal relationship to God. If they observe the mitzvot of their contract with God, then their reward will be the joy of knowing that God indeed dwells among them.

For this paper, the most important aspect of this Torah portion is “in the details.” Why was God so specific about the gifts to be collected and the specifications for the Tabernacle? Our commentators teach us that the sanctuary symbolizes all human achievements. In its details are all the small, seemingly unimportant efforts we make on

the road to our successes. No real achievement is possible without attention to detail. Students, for example, must gather facts one by one, detail after detail, to master a subject. Genuine accomplishments, like magnificent sanctuaries, are the products of hard work, deed after deed, and careful attention to every detail. This is particularly applicable when embarking on a capital/endowment campaign.

In Talmud, Kiddushin 40 it is said: “Study must precede practice.” What does this saying mean for a capital/endowment campaign? I will put it in context of capital/endowment campaigns for which I have been responsible for at Temple Sholom in Chicago, Illinois and my current congregation, Am Shalom in Glencoe, Illinois. At the beginning of both campaigns many congregants believed that the way to raise funds was simply to have the Senior Rabbi make some calls, “press some flesh” and we would raise whatever was needed. After all, being a religious institution, who better to raise necessary funds than the Senior Rabbi? Congregants felt there was no need for committees or lay leadership, no need to hire fundraising professionals and certainly no need to put together a comprehensive development plan.

In reality, however, to accomplish the goals for a capital/endowment campaign requires a comprehensive business plan that utilizes the vast resources of a synagogue. As in the above Talmudic saying, both Temple Sholom and Am Shalom needed to do their homework, study and layout various details and gather the necessary human resources before putting into practice a one time campaign that would shape the future of both organizations.

The subject of this FTA thesis will explore the steps necessary for insuring a successful capital and/or endowment campaign. By researching historic texts, reviewing current development literature and surveying fellow colleagues who have dealt, hands on, with campaigns, I intend to develop the step by step process to help congregations gain a better understanding of how campaigns are developed and how to enable them to meet or exceed their campaign goals.

Where People Truly Wish To Go, There Their Feet Will  
Manage To Take Them

Sukkah 53A

Step one in a successful capital/endowment campaign is being able to articulate why the synagogue needs to raise funds in the first place. In the early to middle 1900’s membership in synagogues was comprised of many first or second generation immigrants. For those Jews, providing financial support to a synagogue was a way of life and an expectation. In most cases they did not need to be convinced of the need to assist their neighborhood shul. Today, the philanthropic environment is a lot more complex and sophisticated. In fact, the survey results used to develop this paper revealed a high level of agreement that a culture of giving to the synagogue does not exist today; therefore, it is the rare exception when one can raise funds for any institution or cause without a clear explanation of how they will be used.

A synagogue needs to have in place a long range plan, clearly defined facility requirements and a detailed document about how money will be used, before embarking on a campaign. The first question likely to be posed by prospective congregational donors is , “Why do you need my funds for the congregation?” There is tremendous competition today for philanthropic dollars. The survey results revealed that in many cases the requests from other worthwhile causes may hinder the ability to raise funds for the synagogue. It does not appear from the survey results that being an urban or suburban congregation has an impact on a congregation’s ability to embark on a campaign, nor does the size of the Jewish community and the number of neighboring congregations (Reform, Conservative, Orthodox and Reconstructionist.) The real target audience for congregational fundraising is the membership of that particular synagogue. However, there is no doubt that Jewish Federations, JCC’s, private schools and other worthwhile causes are aggressively competing for our congregants philanthropic dollars. To compete, congregations need to refer to our history and sacred texts and layout precisely the future vision for the congregation and how a donor’s funds will enable that vision to be realized. As so aptly stated in Proverbs 29:18, “Where there is no vision, the people perish.”

Who is the best person to articulate why a congregation needs to raise funds? While it needs to come from several sources, there is simply no question that the Senior Rabbi is the key component in establishing the vision for the congregation. Survey results indicated that in current or previously held campaigns, the Senior Rabbi not only was critical in establishing the case statement, but was the central person in advocating for campaigns and making calls to set campaign appointments. The survey results also indicated that developing the case for a campaign really involved a collaborative effort that utilized the knowledge and input of Executive Directors, other members of the Senior Staff, Officers, Board members and Campaign leadership. Through a joint effort among these people a long range plan can be developed, a building program established, endowment priorities created and the final case statement established for moving forward with a capital/endowment campaign. While the case statement may be tweaked over the life of a campaign, there is no question that it will serve as the single most important reference document during the campaign.

Pick From Each of Your Tribes (those) Who Are  
Wise, Discerning, and Experienced, and I Will  
Appoint Them as Your Heads.

Deuteronomy 1:13

Now that the purpose of the campaign has been established, leaders of the congregation need to step forward, or be identified, to advocate for the campaign and provide the human resources to run the campaign. From the survey results it is apparent that the Senior Rabbi, Executive Director, President and Board need to play an integral part in promoting and managing the campaign. In fact this may be one of the more important aspects of pre-campaign planning as the survey results also revealed that most congregational members have a low recognition level of the need for funds and will need to be educated. Besides being advocates, the Senior Rabbi, Senior Staff, President and Board are necessary elements in identifying the lay leadership for the campaign. As

committed as a Rabbi or Executive Director may be, it has been proven that the success of a congregational campaign hinges on lay leader relationships. The most successful campaigns are the ones in which a congregational member says to another, "I believe in this campaign and am supporting it financially; please join me by making a commitment. The more lay leadership involved, the better the chance for success.

In my current campaign at Am Shalom, we have a Campaign Committee known as the Committee of 100 -100 congregants working on the campaign in different roles. The success of our campaign is tied directly to the number of people working on it. These individuals are people who care deeply and passionately about the congregation and clearly were picked because of their experience and dedication to the congregation.

The first group of volunteers who need to be identified are the key people who will actually run the campaign. In our congregation they are known as the Campaign Core Team. Its members serve as the oversight and organizational committee for the campaign and all decisions flow through them on up to the Board. As shown in the survey, congregations tend to keep this committee small; the average size in the survey was approximately 10 members, evenly split between Board members and non-Board members. This is important so that the committee represents a cross section of the congregation and at the same time can function efficiently. Survey results revealed that, in most cases there is a chairperson, (in some cases more than one) who is responsible for directing the Campaign Core Team. Some congregations have a coordinating chair who is responsible for more of the day to day management of the campaign. For example, this individual may attend all subcommittee meetings and help with other campaign details. Sometimes the chairs of a campaign are "figure heads" chosen because of their recognition level or perceived financial capability to support the campaign at a significant level. All campaigns need people such as these, however the reality is they are not usually the individuals who will do the campaign leg work. Thus the need for the coordinating chair. The Campaign Core Team needs to be in place from the beginning of the pre-campaign phase and will continue to operate throughout the campaign. The Team will meet frequently and will be the direct interface with the Board of Directors. They will also be responsible for establishing the job descriptions or purposes for the subcommittees to be described in the next paragraph.

In the pre-campaign phase, it can also be valuable to set up various subcommittees. The survey results indicated that some congregations set up subcommittees in the pre-campaign process and others chose not to. This may be a reflection of a congregation's particular approach. In our case the value of setting up subcommittees such as Financial Oversight, Donor Recognition, Public Relations/Marketing, Special Events, Specific Donor Categories, and Planned Giving in the pre-campaign was that strategy and programs could be put in place prior to the campaign kickoff. In addition it enabled us to recruit volunteers for specific roles (subcommittees) where we felt talents would best be utilized. These subcommittees will be further addressed further in this paper.

See, God has singled out by name Bezalel...and endowed him with

a divine spirit of skill, ability and knowledge in every kind of craft and has inspired him to make designs for work in gold, silver and copper, to cut stones for setting and to carve wood-to work in every kind of designer's craft- and to give directions

Exodus 35:30-35

Once the campaign mission has been established and leadership identified, visuals must be developed that will help sell a campaign, in specific a capital campaign. The survey results revealed that the vast majority of recent congregational campaigns were in fact capital campaigns and most were capital/endowment campaigns. Am Shalom's current campaign is a capital/endowment campaign. It had long been understood that the facility in which Am Shalom was housed was in desperate need of infrastructure upgrades and room modernization. In addition while space availability was adequate when the facility was constructed over 70 years ago, the facility no longer meets the needs of a growing congregation with different priorities. Most congregational capital campaigns are in fact put together to either renovate existing (aging) facilities, add an addition to an existing facility or build an entirely new facility.

To accomplish our goal of renovating and modernizing our facility we needed to find our "Bezalel," our architect and designer. As evidenced in the survey results, most congregations that have embarked on capital campaigns, feel that having an architect in place prior to the launch of a campaign is important. In Am Shalom's case, a subcommittee was established known as the Future Development Committee. This campaign subcommittee, comprised of Board members and lay leaders, had the sole responsibility for taking the building program established in the case statement phase (in which they participated) and making it come to life. At the very beginning of the pre-campaign phase, this Committee reviewed request for proposals from several firms to do a master plan of the building. This master plan would set the future roadmap for building construction or renovation. Four architectural firm finalists were interviewed in person and finally a firm was selected to draft the master plan. While initially an out of town architect was selected for this process, eventually Am Shalom chose to transition to a local architect to finish the program. This I believe was important because a local architect is usually more accessible, understands local conditions/materials and is generally is less costly.

With the selection of an architectural firm to do a master plan, Am Shalom than embarked on a 1 ½ - 2 year process to come up with a final plan for the campaign. For the first several months the architect and the Future Development Committee had a program in place to integrate the congregation and community into the process in order to get "buy in" from the congregation. Over 25 meetings were held with various sub-groups of the congregation (Education Committee, Worship Committee, Empty Nesters, Professional Staff etc.) and there were also four Town Hall meetings to which the entire congregation was invited. A Town Hall meeting was even held with our neighbors to include them in the process. Over 250 people (out of a congregation of about 900) participated in these discussions and from this process a master plan was created in which everyone had the opportunity to provide input. It should also be noted that the master

plan phase did not put any restrictions on the project. Congregants and staff were invited to share any and all ideas, whether they could be built and regardless of cost.

After completion of the master plan phase the architect was asked to create some design options that incorporated everything he had learned during this phase. After a few months of additional work, design plans were brought back to the Future Development Committee for input and analysis. After many meetings a final plan was established that was first approved by the committee and then approved by the Board. After approvals were received for the direction of the plan, the next logical step was to find out what the plan would cost and could it in fact be created on the existing site. After a couple of more months the architect, along with an engineering consultant, came back with a cost estimate for the plan as well as the actual full color renderings and a scale model. These drawings and the model were displayed for the congregation to see and another Town Hall meeting was held to answer questions and get feedback on the plans. Based on all of the feedback a building program of \$20 million and an endowment campaign of \$5 million were established. However, even though the Future Development Committee and the Board had signed off on this projected campaign, the need still existed to see if the program and costs were feasible.

#### A Community Is Too Heavy For Anyone To Carry Alone Deuteronomy Rabbah 1:10

While the planning committee and the Board of Trustees may completely support the building project and feel the fundraising goal is achievable, the reality is the final buy in from the congregation must be obtained or the campaign will not succeed. The goals and building design must be shared by the vast majority of the community (the congregation) or the campaign will fail. In the case of Am Shalom, perhaps the most important point in our entire three year pre-campaign process came after the Future Development Committee and Board approved moving forward with a plan. What we needed to do was “test market” the decision to see if there was congregational buy in. At this point as part of the pre-campaign phase, at this point we engaged a professional fundraising firm. As revealed in the survey results, many congregations view hiring pre-campaign fundraising counsel as important as maintaining it throughout a campaign. Interestingly, the survey results indicated that while many congregations felt it was important to engage a professional fundraising firm, most did not feel it important to add to a full or part time Development Director to their staff. While Am Shalom chose to engage both, the modern reality of synagogue life is that funding sources are limited and most congregations simply cannot afford to add a position of Development Director.

As in the architect search, we once again sent out requests for proposals to several fundraising firms, interviewed some finalists and made a selection of a local firm. The critical element of engaging fundraising counsel was to do an assessment study of the decisions reached by the Future Development Committee and the Board. Our professional fundraisers interviewed 50 members of the congregation. Survey results indicated that of those congregations that followed this same path, 43 members was the average number interviewed. In our case the 50 individuals represented people with a

perceived ability to support the campaign at a significant level, founders of the congregation, new members, members with children etc. - a cross section of the congregation.

The results of the assessment study were an eye opening. We learned from the study that most of the people interviewed felt that what we were proposing to spend on the building (\$20 million) was too high. They did not state that the financial goal was unachievable, rather they felt that with all of the other priorities in the community it would be irresponsible to spend this much on a facility. In addition, many respondents felt more should be devoted to the endowment portion of the campaign, to ensure the congregation's future financial security. Finally, many people were unhappy with the building design and felt it needed to be adjusted to better reflect the image and culture of the congregation. There is simply no question that this study was the single most profound element of our pre-campaign process. It was implemented following sensible business and professional guidelines and the leadership of the congregation would have been irresponsible to ignore the important findings. As a result of this study, which was reviewed and accepted by both the campaign leadership and the Board of Trustees, the following steps were immediately initiated:

A. The financials goals of the campaign were redefined. The professional fundraisers concluded that the most that could be raised for the capital portion would be \$15 million (\$5 million less than originally projected) and that there could be an increase in the endowment portion of the campaign. This will be developed shortly.

B. The architects were given instructions to create a new building plan not to exceed \$15 million in hard and soft costs as well as to create a look that would better fit the philosophy and style of the congregation.

Based on these decisions the final financial goals for the campaign were established and the architects developed a new design that was less costly and better matched the expectations of those interviewed. The Future Development Committee, Campaign Core Team and Board signed off on the final goals and projects. Two of the important pre-campaign components had now been finalized.

He Who Does Not Pursue Ultimate Goals  
Is Wasting His Days

Rabbi Nahman of Bratzlav

What the assessment study also pointed out, and really had not been thoroughly developed, was the endowment part of the campaign. As much time and thought as had been put into the capital side, practically no thought had been given to the endowment side. While it was agreed that it would be nice to have an endowment fund producing income to help take pressure off of membership dues and support future programs and services provided by the congregation, it was not being developed. What we really heard from the assessment was that congregants did not want us just thinking about short term goals (renovating the facility) but rather to pursue an ultimate goal of utilizing campaign

funds in the future to fulfill the goals and missions of the congregation. This meant not only developing the case statement for the building but sitting down and being able to clearly articulate to congregants the role of the endowment in the campaign. In addition Am Shalom concluded that it was not good enough simply to put out the case statement for the endowment. Programs needed to be in place (that did not currently exist) prior to the campaign launch for planned giving, wills and bequests and other long term programs that would bring in funds to the endowment. While one of the campaign goals was to obtain the necessary funds for the capital portion of the campaign within a five year period, the conclusion was reached that the endowment piece of the campaign would truly have no end and be an ongoing program. It would get integrated into the fabric of the annual life of the congregation as part of the annual giving program.

The campaign case statement is now ready, building plans are complete, an endowment program established, financials goals determined and campaign leadership is in place. It must be time to start the campaign. While the major pieces of the pre-campaign phase have indeed been accomplished, there are several more details that need to be developed before the official launch of the campaign. At this point, the work of the various campaign subcommittees detailed earlier now come into play.

To everything there is a season...  
a time to plant, and a time to pluck up that  
which is planted

Ecclesiastes 3:2

The synagogue will reap the rewards of a capital/endowment campaign according to the care given during the “planting” phase. The timing and size “of the harvest” will be affected by the menu of giving opportunities, donor recognition and a complete marketing package. To be able to have a successful capital/endowment campaign, the following needs to happen:

A. As described previously, the Endowment or Planned Giving Committee should have programs created and ready for rollout once the campaign begins. In addition to asking for current gifts to the campaign, any solicitor should be prepared to discuss with a potential donor the planned giving options being offered by the Temple. It is a fact that as a whole, our population is aging and many “baby boomers” are just starting to reach retirement age. Thus the endowment or planned giving end of a campaign may become an even bigger feature of future synagogue campaigns. This Committee besides preparing the endowment programs could also discuss how to best market these initiatives. In the case of Am Shalom, two seminars were created which took place after the campaign was unveiled. One dealt with the nuts and bolts of planned giving and the various options. For the second seminar a well known speaker was brought in to talk about retirement planning. For both seminars the target audience was members of the congregation over the age of 50. As reflected by the survey results, a large number of respondents indicated that the largest age group population in their congregations fell in the 50-60 year old range. Thus the importance of actively engaging this age group in discussions of remembering the synagogue in their estate plans.

B. For the purposes of promoting the campaign it is important to have a Public Relations/Marketing Campaign Subcommittee. This Committee will help design the look and feel of the campaign. It should be charged with everything from what the campaign stationary should look like, what size should the commitment cards be, to helping design and produce all campaign literature. In Am Shalom's case a decision was made to create a new look and design just for the campaign. Working with a professional PR firm, the Committee created a new logo, new letterhead colors, brochures for the capital and planned giving campaigns. A separate link on Am Shalom's website was created just for the campaign. The promotional material is invaluable as very few people make a decision at a "first interview" and it is important to be able to leave something with them that can answer questions and remind them of what the campaign is trying to accomplish. The marketing material should include words from the Rabbi, President, a discussion of the campaign case statement and ideally some pictures/drawings of what will be accomplished through the capital campaign. The Public Relations/Marketing Committee is responsible for making sure that potential donors feel the campaign has been carefully crafted and has a professional look and feel.

C. Another important subcommittee is the Donor Recognition or Facility Dedications Committee. In modern synagogue fundraising, many donors will have the expectation that their gift will be recognized in some fashion. Whether it is their name on a donor wall, listed in the Temple bulletin, attached to some component of the building or a program, a successful campaign needs a significant inventory of dedication opportunities to present to potential donors. This Committee should first inventory existing dedications in the facility and then make decisions about new dedication opportunities and their level of value. Many donors will request a complete list of dedication opportunities and this should be carefully crafted as part of the pre-campaign process. While many congregations do not wish to put up the traditional brass dedication plaques, there are many new ways of recognizing and honoring donors that add to the beauty of the building. At Am Shalom, we are going to have a donor recognition wall done in mosaic, individual classrooms will be dedicated with hand woven "plaques" and art work will serve as centralized places for recognition. The Donor Recognition Committee can be creative and have a lot of fun in deciding how to recognize donors. This Committee should also serve to create gift acceptance policies and policies about perpetual endowments.

D. At various stages in a campaign there will be a need to have special events. This could be something as simple as a meeting to unveil new PR material and the donor dedication opportunity list, to full scale dinners/programs at which the campaign is unveiled to special groups within the congregation or the entire congregation. A Special Events Campaign Subcommittee can be created to plan and organize all of the campaign events. Generally there is some type of event when the campaign is "officially unveiled" to the congregation, when various campaign milestones are reached and finally a culminating event when hopefully the goals of the campaign have been achieved. By having a Special Events Committee in place during the pre-campaign phase the Committee can have adequate time to create the look and format for the various events,

plan the budget so the costs get integrated into the campaign budget and coordinate with the Temple calendar to find the right time for the events. Professional fundraisers with whom I have spoken all agree on the same thing - you can never say thank you enough to people who have contributed time and/or money to a campaign. The Special Events Committee can play a prominent role, through events they plan, in the thank you process.

E. The creation of a Financial Oversight Campaign Subcommittee should be established in the pre-campaign planning process. In Am Shalom's case we set up two subcommittees: Financial Administration and Investment. The Financial Administration Subcommittee is fulfilling the campaign fiduciary role. The Committee assists in preparing campaign budgets, examining and approving expense invoices that need to be paid, preparing monthly campaign financial statements for the Board and tracking the return of commitment forms and payment histories. The Investment Committee has the responsibility of establishing investment policies and strategies for the funds that will be received during the campaign. Once again, it cannot be overemphasized that whatever any of the campaign subcommittees propose or establish must first be processed and approved by the Board of Trustees. The Board must be behind every step initiated during the pre-campaign and campaign phases.

The Investment Committee will be responsible for investing the funds that are received during the campaign, assuring that funds are available for the construction costs and putting in place an investment program for those funds that have a longer time horizon, such as endowment funds. The critical aspect of the Financial Oversight Subcommittee is to be able to say, and show, to prospective donors that the finances of the campaign are being managed in a professional manner and that the funds they contribute will be invested wisely. The term we use at Am Shalom is "complete transparency." All donors, and potential donors, should feel comfortable they have all necessary information to assist in their important decision and that nothing is being hidden from them.

F. As part of pre-campaign planning it is important to have in place appropriate software for eventual campaign tracking. Once a campaign is unveiled there will be a large number of variables that need to be tracked ranging from scheduling appointments, follow ups that need to take place, tracking campaign commitments and totals, and finally knowing when people should be billed for their commitments. As evidenced in the survey results, in most recent congregational campaigns, software was in place prior to the official launch of a campaign to handle the necessary tracking. The survey results showed the software can be something as simple as an Excel spreadsheet or in Am Shalom's case, a software module was purchased dedicated just to development. The use of the software and inputting of data can be done either by the Development Director, the Executive Director or the controller of the congregation. Regardless of who inputs the information, having the right software in place to properly record and track a campaign only adds to the professional image the congregation is trying to project.

G. The final group of subcommittees that should be created during the pre-campaign phase, and without question the most difficult to recruit, will be those individuals responsible for doing the direct solicitations. As stated at the beginning of this paper, no matter how good the professional staff, it really takes committed lay leaders and

volunteers to do go out into the community and “do the ask.” Asking for funds is probably the least favorite activity that synagogue volunteers engage in. However, there are some people who do enjoy doing fundraising and others who because of name recognition or community influence, can assist the congregation in reaching the financial goals for a capital/endowment campaign. These individuals need to be carefully selected and asked, usually by the Senior Rabbi, President, Executive Director and members of the Campaign Core Team. The ideal situation would be to identify chairs or co-chairs for various categories of potential giving. At Am Shalom we set up the following commitment categories:

1. 0-\$25,000
2. \$25,000-\$100,000
3. \$100,000-\$500,000
4. \$500,000 and above

Congregants who it was believed would make gifts within each of the four categories were identified. Two individuals were identified to co-chair each category and then they assisted in recruiting individuals to serve with them on their respective committees. I think it is important to establish these groups within the pre-campaign phase for a couple of major reasons. The first is that they can help go through the congregation’s roster and through a rating system try and identify prospects for their particular level of giving. Then when the campaign is launched they will know right away the individuals they wish to target. The second major reason for setting them up in the pre-campaign phase is to allow time for training. As dedicated and caring as volunteer solicitors may be, they still need to be trained on how to ask for commitments. There is a real science to the process and once again this is where the assistance of professional fundraising counsel is so helpful. The professional can assist in the training of the volunteers and teach the methodology that will hopefully result in the largest gifts possible.

Who Stimulates Others To Do Good Is  
Greater Than The Doer

Talmad Baba Batra 9

Following all of the above listed pre-campaign steps will go a long way towards achievement of the capital/endowment goals that your congregation will establish. I fervently believe that no matter the size of your congregation, whether your campaign financial goals are small (modest) or large (aggressive) and whatever the makeup of your support staff, that the above steps make sense for every campaign. I believe one final step will put the “icing on the cake” and provide the final guarantee for success. This paper has dealt with the necessary pre-campaign steps for embarking on a campaign but there is one more step that while in falls in the gray area of whether it is pre-campaign or actual campaign, is critical for achieving success. This step is often referred to as the “silent phase” of the campaign, taking place before the campaign is unveiled to the entire congregation. As so eloquently stated in the phrase from Talmad Baba Batra 9, congregants who “step to the plate” during the pre-campaign phase can only help to

stimulate other congregants to do as well. One cannot underestimate the importance of congregational leadership having made their commitments before the campaign is officially launched. It is an incredibly powerful statement to be able to go to potential donors and say the congregation's Board of Trustees and Campaign leadership and staff is 100% behind this campaign, and have made their pledges. If commitments can be obtained from all of these, then donors will know how strong the support is for the capital/endowment campaign and they will have greater confidence that the campaign goals are real and achievable. In many campaigns, commitments are even sought from the identified "big givers" in the congregation so that when the campaign goes public there is a high level of support for the campaign that has already been secured. In fact, many professional fundraisers will tell you that a nice goal is to have ½ of the campaign financial goal committed before embarking on the public phase of the campaign.

The Talmud tells the story of an old man planting a sapling by the side of the road. A stranger passed by and asks, "Why are you planting that tree? You are very old and it will be many years before the tree will provide fruit or shade." The old man replied, "The food that I enjoyed and the shade that I sat under were provided for me by those who came before me. As my ancestors planted for me, so do I plant for my children and my children's children."

Doing the proper pre-campaign preparation can be one of the most rewarding and fulfilling experiences for both a congregation and the individuals involved. I have learned through this paper many important things taught by our tradition and from fellow colleagues about why it is important to do congregational capital/endowment campaigns and those key items that will insure the success of a campaign. When all is said and done the above paragraph from the Talmud is what synagogue fundraising is all about - it is about planting the seeds and laying the groundwork for future generations. As many prior generations so kindly and thoughtfully did for us, we too have the opportunity through our capital/endowment efforts to preserve for future generations our sacred traditions and beliefs. I could not think of a greater accomplishment and legacy.