



Essential Fundraising Plan

2022

Recommendations from JCamp 180 for Jewish Camps

*This guide was designed with the needs of camps without professional fundraising staff in mind.

Welcome

The past few years of the pandemic have revealed the depth of love and commitment for Jewish camps. We see how kids are struggling. We understand now how much they need camp to connect with friends, discover themselves, have fun without the pressures of school, and discover inner resiliency and grounding through a direct experience with Jewish faith, values, and practice.

Now that we understand the depth of need, it is easier to be generous in helping.

In 2022, we at JCamp 180 especially want to help camps that don't have a professional fundraising staff member to capture the wave of donor interest in helping kids by helping the Jewish camps that they love.

We aim to provide you with just the essential tools and direction you need for fundraising in 2022. By "essentials" we mean the most effective actions that are most likely to result in current support, long-term loyalty, and perpetual generosity. In other words, your best "Return on Investment."

We will also introduce you to our framework, developed over time, for sustaining robust donor engagement you'll need now and in the future.

Thank you for joining us in this work. But more important, thank you for all you do for Jewish children. We are so grateful for your hard work and dedication under extremely challenging conditions. You are our heroes. We are here to support you in your fundraising efforts because of the remarkable gift you provide the Jewish people.



Essential Fundraising Plan

Contents:

1. BIG overarching ideas we are using when thinking about just the essentials
 - Today, Tomorrow, Forever
 - Ask, Thank, Report, Repeat
2. Our top recommendations for what to include in an Essential Fundraising Plan
3. The schedule of JCamp 180 sessions to support you throughout the year

Resources

4. TODAY – Your annual campaign cycle
5. TOMORROW – Your major donor fundraising efforts
6. FOREVER – Your legacy fundraising efforts
7. Monthly Giving Program



Essential Fundraising Plan



TODAY

WHAT?

Grow your broad base of support of donations of all-sizes from many people.

HOW?

Spring Appeal + Fall Appeal + Year End + Impact Report

WHY?

Many gifts from all kinds of people help to build loyalty, identity, and pull in new potential major donors. The “ask, thank, report, repeat” cycle is the best way to stay in touch with many people who care about your efforts.

TOMORROW

Deepen your connection and relationships with major donors.

Individual Major Donor Plans + possible Capital Campaigns

WHY?

80% to 90% of the dollars you raise will likely come from just 10% of your donors. The most cost-effective fundraising you can do right now is to lean into these few relationships with love, intentional effort, and commitment.

FOREVER

Inspire deep, long-lasting, life-long commitment to giving.

Legacy Society + and Monthly Giving

WHY?

People who make a commitment to leave a Legacy gift to your organization give more over the years of their life AND their donation from their estate is typically far more generous than what they can give in their lifetime.



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ASK, THANK, REPORT, REPEAT



Watch a video that walks you through the Ask Thank Report Repeat process. You'll learn how to use this process to raise more money from your "mass" donors, as well as your major donors.

Watch this: <https://nonprofitstorytellingconference.com/story-sequence/>
about 30 minutes but so helpful!



Essential Fundraising Plan

Recommendations for Your 2022 Fundraising Plan

Here are our recommendations for what to include in the essentials of a Fundraising Plan in 2022.

TODAY

1. Schedule for mailing/sending a Spring Appeal and Fall/Winter Appeal with a final push on the last week of the year. Message: “These kids have been through a lot. You can help.”
2. Write and send an impact report after camp in the fall, filled with stories of how donors helped campers and young adult staff with their donations.

TOMORROW

3. Identify your **top major donors**. Create a specific engagement plan for each person for the year, and schedule now when you will meet with them personally to make a one-on-one ask, when you will meet with each of them to make a one-on-one thank, and when you will meet with them to make a one-on-one report of the impact of their giving.

FOREVER

4. Create or rebuild Legacy giving this year.
5. Encourage all Board members to move over to making a monthly contribution for the entire time they plan to serve on the Board (a multi-year commitment).

Extra Credit

6. Plan for how you might use the summer to engage folks in 2022. It might be best to clarify if guests/major donors/board members will be invited to camp in the summer or not. And if not, define an alternative to collect and share stories of impact.
7. Include in your fundraising plan any other ideas, such as grants, reunions, anniversary events, and so on. Even lower priorities can gobble up precious time of staff and volunteers - think golf outings, raffles, and in-person galas with honorees. It is our opinion that most such activities do not build lasting community, commitment, or a feeling of belonging, and do not result in repeat giving.



Essential Fundraising Plan

Here to Support Your Success in 2022

Schedule of Monthly support sessions in 2022

January: Start here – The Essential Fundraising Plan

What it is, why we recommend it, how to use it, next steps

February: How's Your Plan?

We review your Fundraising Plans and answer FAQs

Send your plan to us in advance and we'll give you feedback: JCamp180@hgf.org

March: Spring Appeals

Spring Appeal Letters read, reviewed, and discussed

Send your spring appeal in advance and we'll give you feedback: JCamp180@hgf.org

April: Donor Cultivation for Camp Season

Creating Individual major donor engagement plans and invitations

May: Donor Stewardship Summer and After

Prepare to gather summer's best stewardship stories and images

June: Summer Check-in

How is it going?

August: End of Year Planning

Looking Ahead: Put in place content for end of camp report, impact report, fall/year-end appeal content, Giving Tuesday, major donor assignments, etc.

September: Impact Report

Key tool for stewardship leading up to year-end giving

Send your Impact Report in advance and we'll give you feedback at JCamp180@hgf.org

October: Legacy Month – Legacy is Forever

Discuss your Legacy fundraising, or come to learn more about it

November: Major Donor Asks

Set up individual, personalized year-end asks. We'll cover the "art of the ask."

December: The Final Push

Who to call, what to send, when to send?



Essential Fundraising Plan

Resources: TODAY and the Calendar Cycle

	Today	Tomorrow	Forever
	All others	Major Donor	Legacy Members
January	Plan		
February		Engage	
March			
April	Ask		
May		Engage	
June			
July			
August			
September	Report	Report	Report
October			
November	Ask	Ask	Ask (new members)
December			

Your appeal letters:

- Problem is easy to understand
- Solution to the problem if you give
- Urgent to solve

Thank:

- Emotional
- Thank is specific to the Ask
- Thank for what the **Donor** did (not the org)
- Thank Promptly

Report / Newsletter:

- Stories centered on how wonderful the donors are for saving the day
- Numbers or statistics or graphics don't stick
- Photos of beneficiaries
- Readers focus on headlines, pull quotes, photo credits over content



Essential Fundraising Plan

Resources: Creating Individual Major Donor Plan for 2022

Step 1: Pull a list of your top donors, historically. The list should include this kind of information:

- Name, date of most recent gift, gift amount, total number of gifts, total amount given.
- How this person is connected to Camp: Alumni, Parent, Grandparent, Board member, etc.

Step 2: Discuss this list and decide how many of these people will get special care and attention. Decide who will be assigned which relationships.

Step 3: Watch this video if you’ve not done so already:

<https://nonprofitstorytellingconference.com/story-sequence/>

Step 4: Set up a spreadsheet* with a month-by-month plan for each person. The spreadsheet should include basic donor information (such as donor ID #, name, spouse name, city, connection to camp, assigned manager, and notes to help you recall this person.) Then make a calendar, month by month, with a column to record your progress – “Pending,” “In-Progress,” “Postponed” or “Done.”

Donor ID	Donor	Jan	P	Feb	P	March	P	April	P Nov
18	Bill Goldman	Meet to thanks				Meet to report				Ask for \$25 K
123	Jan Pippin									

Step 5: On the Calendar include any mass communications you are planning (such as appeal letters or your impact reports).

Step 6: Schedule THREE personal meetings with each person in the coming year: a “Thank you” meeting, a “Reporting” meeting, and an “Asking” meeting. At the Asking meeting, ask for more than you think you might get.

Step 7: Accountability Buddy. Find an accountability buddy that you can meet with each month to check in on your monthly progress.

**You may be able to track this data in your donor database; at a minimum, tracking touchpoints with your major donors in your database when they happen is important for the institutional memory of your relationship with each donor/prospect.*



Essential Fundraising Plan

Resources: The Essential Legacy Plan for 2022

This is our recommendation for either supporting or starting your Legacy fundraising efforts this year to ensure your Camp is “top of mind” for the many people who care about your work:

1. **Marketing:** Include this statement at the end of email signature lines, bottom of newsletters, etc. because it is easy to do and very effective: *“Be remembered forever by **CAMP NAME** with a gift in your will, trust, retirement plan or life insurance policy”*
2. **Legacy Collateral:** Make sure your Legacy “Letter of Intent” is available if you don’t have one and up-to-date if you’ve not looked at it recently. Click [here](#) for a sample Letter of Intent.
3. **Legacy Asks in 2022:** Have two people trained to have Legacy conversations and set a goal to add a few new members this year. Here is a webinar on the “Art of the Legacy Ask” <https://jcamp180.org/knowledge-center/legacy/the-art-of-the-legacy-ask-webinar>
4. **Steward Legacy Members:**
 - a. Create a public listing of your Legacy members
 - b. Warmly thank each member this year (and every year)
 - c. If you have any public events this year in-person or on zoom, include a shout-out of thanks to all your Legacy members.

Here is the Toolkit for Legacy fundraising: <https://jcamp180.org/professional-development/camp-legacy-initiative/life-legacy-for-jcamp-180-toolkit>

Here is a short excerpt from Michael Rosen and Russell James’ white paper on why now is the “best of times” for Legacy Fundraising: ([Here is the link](#) to the full White Paper.)

“Most people tend to put off estate planning in normal times. In the U.S., most adults over 50 have no Will or Trust documents. But, from a massive longitudinal study in the U.S., we also know what triggers people to make a will. The typical triggers for planning fall into one of two camps, family structure changes or “death becomes real.” Family structure changes include marriage, divorce, birth of first child, birth of a first grandchild, and widowhood. “Death becomes real” includes diagnosis of cancer, heart disease, stroke, moving to a nursing home, or actually approaching death (measured retrospectively). The pandemic has become a “Death is real” experience for many more people. In one experiment with British solicitors (lawyers), simply asking the question, “Would you like to leave any money to charity?” more than doubled the share of people including charitable gifts in their Will documents. Even small alterations in the wording used to describe such gifts results in dramatic changes in both charitable intentions and actual document contents. **For a charity, being “top of mind” at the moment in which people are actually planning is critical.**



Essential Fundraising Plan

Resources: The Essential Monthly Giving Plan for 2022

Step 1: Click here to watch a JCamp 180 webinar on starting a Monthly giving program:
<https://jcamp180.org/knowledge-center/fundraising/the-fundamentals-of-sustainer-monthly-giving>

It includes these resources:

- [Webinar Slides](#)
- [Detailed Guide from Erica Waasdorp for Increasing Donor Retention Through a Monthly Donor Program](#)
- [Monthly Donor Retention Playbook](#) (includes sample communications, phone scripts, etc.)
- [Sample Monthly Giving Form and Frequently Asked Questions](#)

Step 2: Make any changes needed internally to be able to collect recurring donations and effectively steward recurring donors.

Step 3: Identify one Board member willing to make the switch. Have that person speak at a future Board meeting to encourage others to make the switch over to monthly giving.

Set a goal to have most if not all of your Board members enroll as monthly donors in 2022.

The Essential Fundraising Plan for 2022

Ready? Set. GO!

Make a fundraising plan for 2022. Write it down. Use it to agree upon who will do what by when and how. Clarify what camp staff will do and what volunteers will do. The content in this guide defines our recommendations but are not requirements. It is better to try to do less that you can sustain and do well than to try to do it all.

We would love to see what you come up with and we are happy to provide you with feedback and suggestions. Simply email your plan to us at JCamp180@hgf.org before February 17, 2022.