

Philanthropy Report
2018–2019

Submitted by

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Overview

We have made some excellent strides in the last year, and we can only hope to grow upon them in the coming year. We set our sights on \$750,000 as our fundraising goal which was a 20% increase over the 2017-2018 goal. We are happy to share that we are close to achieving that number. We currently have \$725,947 pledged between Annual Giving, Micro-Campaigns, and Strategic Philanthropy. Of that, we have received payments for \$659,389. This is an excellent place to be sitting in May. Of the pledges that we have yet to collect, we have been in communication with the families and anticipate collecting over \$60,000 of those funds.

Annual Giving

Annual Giving comprises the largest percentage of how the Philanthropy Department secures funds and includes four types of giving:

1. Leadership Circle
Gifts in support of Annual Giving of \$1,800 or more above dues and fees. There are additional levels up to \$50,000+ (One need not make a multi-year commitment to be included in Leadership Circle)
2. Haverim/Friends
Annual Gifts between \$1,000 - \$1,799
3. Community
Gifts in support of Annual Giving under \$1,000
4. Yom Kippur Appeal
Gifts committed to during services that are not directly solicited

This year we secured \$605,051 in annual giving commitments. We believe this success can be attributed to both a deeper embrace of relational giving and a model Yom Kippur appeal. In a Relational Giving Model, the Philanthropy Department partners with members of the community to ensure a deeper understanding of our giving goals. We have seen success through this personalized approach this year and look forward to more lay leaders partnering with us next year. The Yom Kippur appeal last year was well received at the main service and continues to be successful, however, at the family service, while we did see an increase this year, it is important that we start to look at how to more creatively connect with that community moving forward.

Micro-Campaigns and Additional Successes

In addition to our financial successes, we have achieved some structural goals as well. The Development Committee is formed and examining ways to reach out to the larger community. Their first step was to partner with the Preschool community for the Spring for a Spruce Up Campaign. As we all know, fundraising in the Preschool could certainly be stronger, and the Development Committee is very focused on building that relationship. We partnered with PAC and PPA in setting a plan to accomplish that goal, and this campaign was the first result of that partnership.

A micro-campaign is a fundraising opportunity focused around a specific event, community, or need with a smaller targeted goal. This year we conducted two successful micro-campaigns for Installation and our preschool focused Spring for a Spruce Up campaign. For installation we raised \$27,632 to support initiatives that our clergy identified as priorities. The Spring for the Spruce Up Campaign which was a partnership between Isaiah Men's Group (IMG), Parent Advisory Committee (PAC), Preschool Parent Association (PPA), and the Development Committee raised over \$30,000 to enhance and replace much needed preschool equipment.

The Isaiah Men's Group kicked off the initial \$20,000 raise for trikes, industrial strength sand toys, sheds for those toys, and new equipment for the Miller Courtyard, with their IMG Poker Night. We were not sure what to expect but walked away from that night having raised \$7,602 toward the goal. On Friday, March 22nd, we kicked off our direct outreach campaign using an email from Tamar and Avital and a good showing of folks in the lobby and a thermometer to measure the progress.

This is a great example of the relational model we have laid out, and we are quite proud of the success of this first step. When the campaign ended prior to Passover we had raised \$22,008 from parents alone, far exceeding the expectations of the campaign. PAC, PPA, and the Development Committee are committed to partnering to find additional opportunities in the future.

Strategic Philanthropy

Strategic Philanthropy is a gift for a specified purpose clearly stated by the donor. Some communities refer to these as restricted or designated gifts. These gifts provide a great opportunity for donors to focus their gift on an area that they are deeply passionate about. This year we received nearly \$65,000 in strategic philanthropic gifts in support of Shabbat programming, digitizing our archive, and for security enhancements.

Endowment

Our Endowment fund, which is currently held with the California Community Foundation, held stable during FY2018-2019 with just shy of \$1.6M invested. Growing our Endowment continues to be a priority long term goal and Rabbi Zoë Klein Miles continues to have conversations with members about potential gifts either cash, property or estate plans that would help increase the value of our endowment. The committee continues to identify potential ambassadors who will help us build a more robust endowment.

2019-2020 Vision

The Philanthropy Department is focused on strengthening our partnerships in the coming year. This includes board members, committee members, and with our new relationship with the Preschool, it includes PAC and PPA as well. What we know is that when we work together, we are better able to achieve our goals. We are convinced that these direct relationships will bring Isaiah's fundraising model in line with the rest of the things we do here, and we look forward to broadening our relationships to do just that. The goal is to make giving to Isaiah as much a part of #BeingIsaian as delivering warm chicken soup when someone is ill.

2018-2019 By the Numbers

\$725,947 committed Via Annual Giving, Micro-Campaigns, and Strategic Philanthropy

Annual Giving

\$601,051 from 426 Unique Family Gifts

Event Based and Strategic Philanthropy

\$27,632 Installation

\$11,596 IMG Poker (net \$7,602)

\$50,000 Shabbat Enhancement

\$6,160 from a family for Security Support

\$7,500 for Archive Project

\$22,008 Preschool Spring for a Spruce Up Campaign

Outstanding Balances

\$601,051 via Annual Giving of which \$534,493 has been realized

\$46,000 of the outstanding gifts comes from 3 pledges we know will be fulfilled

\$16,080 is from 12 gifts that we have been in communication with families and they intend to fulfill their commitments

\$4,478 is from 15 gifts we are unsure if they will be paid, all of these pledges were made during the YK Appeal.

All of the Event Based and Strategic Philanthropy Funds have been realized except for the \$6,160, which the family is aware of.

We also are in communication with a family about a \$20,000 gift and not reflected in these numbers is a \$25,000 challenge grant available to our community, we are still working to identify the best way to use this opportunity.

Giving in 2018 – 2019 Resulted in the Following Percentages as compared to 2017-2018:

73.1% of gifts were new or increases

13.1% Decreased

13.8% remained the same