

MATCH Montreal Introductory Webinar

Monday, September 21, 2015

match

Matching First-Time Gifts to Jewish Day Schools

Welcome!

Your Presenters:

- Suzanne Kling Langman, MATCH Coordinator



- Jennifer Weinstock, Day School Fundraising Expert



Etiquette:

- Please do not put your phone on hold.
- *6 to mute/unmute.
- Chat using interface at bottom right.

Goals of Today's Webinar

- Introduce the **details** of MATCH Montreal.
- Provide **tools** to help you get started.
- Share **ideas and practices** that have worked for other Jewish day schools.
- Address your **questions**.



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What Is MATCH Montreal?

- A matching grants program which aims to spark dynamic **new funding relationships** for Jewish day schools.
- Funded by the **AVI CHAI Foundation** and **Generations Fund of Federation CJA, implemented by BJEC**
- Grants matching funds to schools for **new gifts of at least \$5,000** from first-time donors or those increasing their largest previous gift fivefold.
- Gifts are matched at **\$0.50 for each \$1.00** raised.
- Individual schools may receive **up to \$50,000** in matching funds (raising \$100,000 brings your school \$150,000).



מרכז ברונפמן לחינוך יהודי
Centre Bronfman de l'éducation juive
Bronfman Jewish Education Centre

Why Participate in MATCH?

- **Grow** your school's donor base.
- **Focus** and **motivate** your development team.
- **Energize** solicitors and board members
- **Leverage** gifts for greater impact.



match **FACT**

In the four previous rounds of MATCH, over 200 schools across North America brought over \$58 million to their schools.

MATCH 2012-2013 Gifts

49% \$10,000

23% \$50,000+

56% first-time donors

44% donors who increased their previous giving fivefold

MATCH Donors Repeat

match **FACT**

In a previous MATCH round, 77% of donors made repeat gifts after MATCH, at an average of 75% of the amount of their MATCHed gift.

Eligibility

Donors must be either:

- Making a first-time gift of at least \$5,000 in support of any Jewish day school, or
- A previous funder(s) of a Jewish day school, who is making a contribution at least five times their previous largest gift

Donors can be:

- Individuals, spousal units, or family foundations
- Parents of current students or alumni
- Grandparents
- Day school alumni
- Community members
- Other friends of the school

Gifts must be:

- At least \$5,000
- For previous funders, at least five times the total sum of a donor's previous largest annual gifts to any Jewish day school
- Paid to an eligible Montreal area day school between September, 2015 and December 31, 2016.
- In support of general operating expenses, earmarked for a specific program or project, or for endowment. Capital gifts are excluded.
- Given in the form of cash (checks or wire transfers) or transfers of publicly traded stock. Credit card payments are excluded.
- Note: all dollar amounts are in Canadian dollars.

Important MATCH Dates



September 21, 2015: MATCH Application available at
www.dayschoolmatch.org/montreal

August 31, 2016: Application deadline

December 31, 2016: Last day for donors to pay gifts to schools

January 30, 2017: Deadline for schools to submit payment documentation

NOTE: *Applications will be evaluated and matching funds awarded according to the order in which they are completed. Submitting an application prior to the deadline date of August 31, 2016 does NOT guarantee consideration for a grant.*

Application Process



Applications are available at www.dayschoolmatch.org/montreal and contain four pdf sections:

1. **School Application** (to be completed by school professional)
2. **Gift Application** (to be completed by school professional)
3. **Donor Application** (to be completed by donor)
4. **Donor Eligibility Statement** or **Foundation Eligibility Statement** (to be completed by donor)

Sections 1 and 2 should be completed and signed **by day school professionals**.

Sections 3 and 4 should be completed and signed **by donors**, and returned to day school professionals.

Day school professionals should submit **all four sections** in one scanned pdf file.

In addition to the application materials, school professionals are asked to submit Annual Reports for the past three years if available in hard copy or via pdf.

Application deadline: Wednesday, August 31, 2016 at 5:00 pm Eastern

What Does MATCH Do?

MATCH gives you an EXCUSE.

Make a phone call, set up a meeting.

MATCH gives you CHUTZPAH.

Increase the size of an ask you are contemplating for a donor.

MATCH gives you LEVERAGE.

Donors raise their gift levels to be eligible for MATCH.



Launching Your School's MATCH Campaign



1. Send a notice about MATCH to your board.
2. Create a prospect list.
3. Identify 2-3 lay leaders to be MATCH champions.
4. Hold a prospecting session with your leadership team.
5. Create cultivation strategies for prospects not ready for a solicitation.
6. Schedule solicitations when time is right.
7. Celebrate each MATCH gift.

Finding MATCH Prospects

- Parents paying full tuition whose annual gifts are \$180-\$360.
- Grandparents who are paying tuition for their grandchildren.
- Community members who support Jewish education.
- Alumni over age 30 who have made major gifts elsewhere.



Where Does MATCH Fit in your Annual Campaign?

Approach MATCH from a **HOLISTIC** standpoint:

What are you already doing that could be helped by MATCH?

Be **STRATEGIC**:

Cultivate new donors, increase community support, reach out to alumni, increase the number and amount of annual gifts.

Think of MATCH as a **TACTIC** for achieving your strategies:

MATCH is a perfect excuse to connect with a donor and let them know about the chance for their contribution to have an even greater impact.

Bring up MATCH during an alumni reunion.

MATCH helps you **BUILD RELATIONSHIPS** with your donors:

Connect your donors to your schools needs.

Why do donors support your school?

MATCH is a “big-picture” conversation opener.

Assessment: Two Variables

Commitment

How does this donor/prospect exhibit a connection to your school or to day school education and future of the Jewish people?

Capacity

What size gift seems possible beyond what has been given in prior years?



Judging Capacity

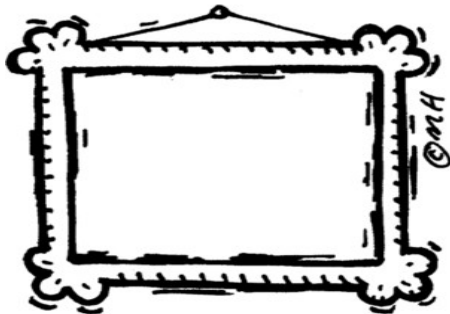
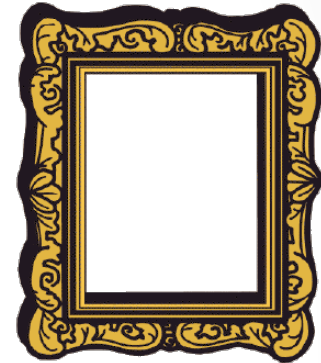
The Eternal Conundrum?

- **Determining Household Income**
 - Know occupations and titles of heads of household
 - Internet research on mean and median in the field
 - Calculate possible total household income
 - Tithe? 10% or 2% (national average) or 5%
 - Before or after taxes? You decide!
- **Indicators of Capacity**
 - Online research
 - Full-tuition payers
 - Leads and anecdotes from board members and leaders
 - Annual reports and donor listings
 - Google!



Create a Prospect Portrait

- Name
- Contact information
- Business information
- Philanthropic history with school and externally
- Affiliations and organizations
- Financial information (home value, compensation, estimated household income)
- Relationships and activities with schools



Recap



- MATCH applies to gifts of **\$5,000 or more** from new donors or those increasing gift fivefold
- Gifts are matched \$0.50 to \$1.00
- Up to \$50,000 available per school
- Application deadline: **Wednesday, August 31, 2016** at 5:00 pm Eastern
- Gifts must be received Sept 1, 2015-Dec 31, 2016
- MATCH gives you **Chutzpah!**

Questions

Use Chat box on lower right to submit your questions.



Contact Dr. Shimshon Hamerman via email at
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www.dayschoolmatch.org/montreal