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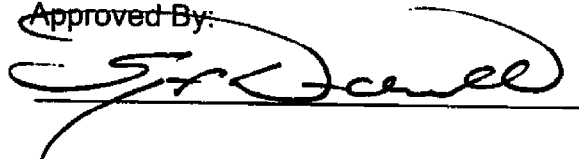
HEBREW UNION COLLEGE-JEWISH INSTITUTE OF RELIGION
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UNIVERSITY OF SOUTHERN CALIFORNIA
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Country Club Fundraising: Focus on Young Men at the Jewish Federation of
Greater Los Angeles

Approved By:



**COUNTRY CLUB
FUNDRAISING:**

**FOCUS ON YOUNG MEN
AT THE JEWISH
FEDERATION OF
GREATER LOS ANGELES**

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Masters' Project 2004

**COUNTRY CLUB FUNDRAISING: FOCUS ON YOUNG MEN AT
THE JEWISH FEDERATION OF GREATER LOS ANGELES**

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I. EXECUTIVE SUMMARY

Fundraising in country club settings is an effective form of raising money. At the Jewish Federation of Greater Los Angeles \$45 million was raised in 2003, one-third through donors who belong to Jewish country clubs. To date, no study had been conducted exploring why these members give, how being a member of the country club affects their giving, and what areas of the campaign/relationship to Federation are the most effective and ineffective. This report will begin to address these questions, highlighting common themes and recommendations for the future. The results of this project will serve as data for a more defined approach toward country club fundraising at the Los Angeles Jewish Federation.

The results indicate that fundraising within a country club environment is unique for several reasons. First, there is a limited audience of individuals. Having a small and captive audience means that Federation professionals have a specific group of people to whom their efforts can be geared. There is also an "obligation" to give, and therefore new country club members will want to hear what the Federation has to offer. It can also be assumed that those who have obtained club membership have a significant financial capacity to give. In practice, this equates to a explanation for spending time with young donors because it is likely that as they age, so will their giving capacity. Also, when working with people with whom a prior relationship does not exist, the connection with the country club forms an immediate area of common interest.

Over the past few years the country club campaigns within the Jewish Federation have grown as cultivation and personal relationships have been accorded a higher priority. More staff attention has been focused on club members, resulting in more dollars raised. This report includes several specific recommendations that will help improve country club fundraising at the Los Angeles Jewish Federation. However, overall it seems that country club fundraising is not

completely unique. Similar to other fundraising efforts, donor cultivation and personal relationships make a significant difference in the success of a campaign. A limited audience and higher financial capacity within a country club environment add elements that will lead to success. Ultimately donors want personal relationships with the organization and confidence that their contributions will help those in need.

II. INTRODUCTION/BACKGROUND

The Jewish Federation of Greater Los Angeles raises over \$45 million annually. Over one-third of this amount comes from donations from individuals who belong to country clubs with a historically Jewish membership. These donors primarily associate with the Federation through their club membership. The country clubs themselves have a unique relationship with the Los Angeles Jewish Federation, allowing the Federation to hold events and have contact lists of their members. Traditionally, the Federation is also recognized as the "preferred charity" of these clubs.

Within the city campaign there are two Jewish country clubs. One was founded in 1903 and the other in 1922. When a member is applying for membership at these two country clubs their philanthropic record is examined. One club also considers volunteer time commitment. Historically, it was required that the member contribute to the United Jewish Fund (UJF), the fundraising arm of the Jewish Federation. The official requirement has since changed to a recommendation. Once accepted into the club, members remain in a probationary status for two years, and their financial contributions continue to be monitored. After a member gains full acceptance to the club, their contributions are no longer closely monitored by the club leadership. It is not uncommon for a prospective member to make a significant gift to the UJF concurrent with the application process. When the person's membership is secured it is possible that they will discontinue giving. However for many, this is the beginning of a long-standing relationship with the Jewish Federation of Greater Los Angeles. A high percentage of the past and current leadership of the Los Angeles Jewish community comes from country club membership. In 2004, 48% of the Los Angeles Federation's Board of Directors and 66% of the Campaign Cabinet are members of the two Jewish country clubs in the city.

Within the country club division at the Los Angeles Jewish Federation, fundraising activities are divided into a men's campaign, a women's campaign and a young men's campaign (ages 40 and under). This structure is similar to other divisions in the Jewish Federation; however fundraising within a country club environment is unique. Within the country club fundraising structure there is a limited audience of individuals. This creates a defined and captive audience for whom the Federation professionals to gear their efforts toward. Due to the requirement to contribute, it is likely country club members will be interested in hearing about the Jewish Federation. Typically, those who have obtained club membership have a larger financial capacity to give than the average Federation donor. In practice, this equates to giving priority to working with young country club donors because as they age, so will their giving capacity. In general young leadership this may not be the case. As well, when working with new potential donors, the mention of the country club forms an immediate common bond.

Another unique aspect of country club fundraising in the Los Angeles Jewish Federation is the continuation of card calling as a solicitation method. Traditionally, card calling, the public announcement of pledges at the Club's UJF Event, has been conducted annually. This norm is still prevalent and is a voluntary activity. This public announcement of gifts has proved to be an effective fundraising strategy. Through observing the card calling process it was apparent that older members were emotionally inspired by the young club members contributing to UJF; in response to a young member's increase, many would raise their own UJF contributions. Also, the public announcement of giving levels or amounts sets a clear standard and influences members through peer pressure.

Contact between the male membership in the country clubs and Federation throughout the year begins in January during primacy, if not before. A committee of approximately 20

volunteers is formed around the planning of the annual Country Club/UJF Men's Play Day and Dinner and also to organize solicitation assignments. The annual event begins early in the morning with golf and tennis tournaments and culminates with a sit-down dinner including cocktails, a fundraising pitch and a compelling speaker. At one club event, voluntary card calling is conducted.

After the annual Play Day and Dinner contact between the Federation and country club membership is more intimate and informal. Smaller events such as legislator lunches, mini-missions, solicitation trainings, and speakers in member's homes are held. The young members have more of these smaller events. The Federation professional works with the active lay leadership following up on pledges that were not made at the annual event. It is after the Play Day and Dinner that personal contact such as outreach and education become more primary.

This research project was created due to the importance of country club donations. It is assumed from the members' giving levels that Federation fundraising within the country clubs is effective. However, no formal study has been conducted researching why these members give, how being a member of the country club affects their giving and what areas of the campaign/relationship to Federation are the most effective and ineffective. This report will begin to address these questions, exploring existing trends and recommendations for the future. Through personal interviews, conducted face-to-face or by phone, with 6 professional staff and 13 male lay leaders (11 young members) it is possible to begin to analyze the importance and effectiveness of country club fundraising. Personal experiences and feelings were recorded as well as constructive advice for what is effective and suggestions for the future. The results indicate many strengths of the current UJF campaigns in country club settings and challenges to

overcome. Hopefully, this project will serve as a beginning to a more strategic approach toward country club fundraising and relationships in the Jewish Federation of Greater Los Angeles.

As part of this research study, three case examples were researched. Many other Jewish Federations across North America conduct country club or affinity campaigns. The Los Angeles Jewish Federation has the opportunity to learn what is working in these other communities and perhaps adapt some of their strategies. Interviews were conducted with a professional staff person in three locations: a Jewish Federation in a California community, a Jewish Federation in Florida and a Jewish Federation in a major northeastern city.

III. JEWISH FEDERATION OF GREATER LOS ANGELES PROFESSIONAL STAFF

Before speaking with the lay leadership of the country clubs it was necessary to gather opinions from the experienced professional staff at the Los Angeles Jewish Federation. The six staff spoken to have 55 combined years of experience working with the Jewish country clubs in Los Angeles. Interviews with the staff highlighted four areas of focus as critical to country club fundraising: (1) members' motivations for giving, (2) how success is defined and what is currently working effectively/ineffectively, (3) areas to address in the future and (4) the role of the Federation professional.

Motivations for Giving

Most of the professionals interviewed cited peer pressure and a sense of personal responsibility as the two primary motivations for giving in a country club atmosphere. Observing the 2004 country club events furthered this observation. The campaign pitches made by club members emphasized the importance of giving from a standpoint of personal responsibility, both as a Jew and as a member of an elite society. Both club pitches referred to made references to the formation of a Jewish country club because Jews were not accepted elsewhere and the importance of loyalty to Israel and the Jewish people. These motivations for giving are common throughout Jewish philanthropy and are often emphasized when asking a Jewish audience to contribute financial resources. Unique to the country clubs, however, is that both club pitches also spoke of the individual's responsibility to give because of their elite financial status. Both pitches emphasized the members' privilege to be a part of such a country club and the philanthropic responsibility directly linked to this privilege. Other possible motivations included desiring a sense of community with their club peer group, tax benefits for the wealthy and philanthropic giving as leverage to achieve club peer acceptance.

All professionals discussed the country clubs' encouragement of members to become involved financially and with their time. The older members set clear expectations for younger members through their own actions. Family values of being involved in philanthropy are also established, as intergenerational giving is widespread. It is not uncommon to have three generations of a family involved in the club and contributing to the Jewish Federation.

Through the country clubs and Federations long standing relationship, a "campaign culture" has been established. Most members are familiar with the name Federation or UJF even if they are unclear as to what it represents. Being involved philanthropically with the Jewish Federation is set as a standard for young country club members. Involvement is a way to gain acceptance and elevate status within the club. Taking this into consideration, it is a natural progression to understand why such a high percent of general Federation leaders are also country club members. One staff person stated that there is not enough continued contact with the donors outside of the one major annual event, which leaves donors feeling undervalued.

What is Success?

Success within the country clubs can be evaluated in two ways: the amount of money raised for UJF and the quality of the leadership and involvement of country club members. Currently penetration in the country clubs is about 75%. However, it is both involvement and leadership that is necessary for success. One professional cited the importance of a traditional top-down leadership approach with those at the top giving significant and meaningful gifts. These elements indicating success are the same as within any campaign division of the Federation. It is the composition of the club population and the strategies used that are unique.

Within the men's campaign many things are working well, according to Federation professionals. There is a positive relationship between the volunteers and staff person as well as

a solid structure of peer-to-peer solicitations. Individual strategies to reach each donor are used whenever possible. It has also been useful to utilize business relationships in solicitations as a means of leverage.

The women's campaigns at the country clubs are also successful in respect to the number of donors. Seventy-five percent of the women in the country clubs contribute to the Federation, albeit at lower levels than their male counterparts. The professional staff cites a few key fundraising strategies that contribute to their success. The display of an "Honor Roll" at the country club annual events publicizes each member's contribution. This creates peer pressure and an incentive to increase their gifts. In addition, the women's club campaigns encourage increased giving through prize drawings. Each time new members are accepted in the clubs, the Federation hosts an outreach program called "New Member Luncheon" with active leadership explaining the importance of involvement in UJF. Finally, the women's club campaign emphasize the importance of planned giving. The current Los Angeles Jewish Federation's Endowment Chair is active in the country club campaigns.

Areas for Future Focus

There are also areas that present challenges. The annual men's UJF event, while an effective fundraising tool, is reported by some to be "predictable." The Play Day and Dinner are not as appealing to the younger generation. The event is also less "coercive" now since card calling is no longer mandatory. Also, the same volunteers and solicitors appear to be involved each year. There is a need for new volunteers to take on leadership responsibilities. The selection and structure of leadership is essential, as they are linked to the club members' views and perceptions of the Federation. It is necessary that the active leadership be well educated about Federation's case for giving and community involvement.

Role of the Federation Professional

The role of the Federation professional within the country clubs was an area of little consensus. Some of the staff stated that they were treated as peers and viewed with respect whereas others felt as though they were "hired help." These varying viewpoints will later be addressed with the lay leaders' view of the role of the Federation professional.

IV. LAY LEADERSHIP — FOCUS ON YOUNG MEN'S COUNTRY CLUB MEMBERSHIP AT THE JEWISH FEDERATION OF GREATER LOS ANGELES

In consultation with the Federation professional that works most closely with the Young Men's Country Club UJF Campaigns, 12 male donors were identified for interviews. These volunteers represent varying levels of involvement and giving levels with the Jewish Federation of Greater Los Angeles. Some are current or past chairs of the Club UJF Campaigns while some are reluctant to become involved.

Similar to the interviews with the Federation professional staff, four areas of focus were explored during the interviews. They include: (1) members' motivations for giving, (2) how success is defined and what is currently working effectively/ineffectively, (3) areas to address in the future and (4) the role of the Federation professional. Much feedback and suggestions were received in the course of these interviews. A list of recommendations gathered from this information can be found on pages 26-27. An additional benefit of the interview process was positive cultivation and relationship building between the Graduate Intern and donors. Several donors felt honored to have their opinions solicited and through these conversations realized the extent of their feelings about their involvement with United Jewish Fund.

Motivations for Giving

Three themes regarding "motivations for giving" emerged through this process. First, many club members contribute to UJF because they feel an obligation or expectation from the country club itself. Some use their philanthropic involvement as "social climbing," giving being understood as part of the club identity. As stated in the introduction, when members apply to the country club they are evaluated based on time and financial commitments to philanthropic causes. Involvement with UJF is seen positively and can be used for membership purposes alone.

Second, many donors are motivated to contribute to the Jewish Federation because they feel responsible to do so based upon their family history. Some of the volunteers grew up in households where philanthropy was a priority and they were raised in a "culture of giving." This is unique for the Los Angeles Jewish community but a common theme in many east coast or more traditional Jewish communities. Also included in personal motivations for giving is a connection to a specific agency or cause based on family history. For example, one volunteer cited a relationship with one of Federation's beneficiary agencies as their reason for continued giving.

Finally, a small minority of the volunteers interviewed cited outside circumstances, such as the *Intifada* in Israel and the increase in terrorism, as adding to their motivations for giving to the Jewish Federation of Greater Los Angeles.

It was found that being a member of a country club does increase levels of giving. Seventy-five percent of interviewees said their membership strongly influences their regular giving. In fact, at least one donor said his first exposure to continual annual giving was through his club experience. Twenty-five percent disagreed, citing their family involvement and values as their primary reason for UJF involvement.

What is Success?

Success was defined in several ways: total amount of money raised and degree of penetration within the country club. How many people are contributing was cited as particularly important with younger members. This is significant because as the young club members form a personal relationship with UJF they are likely to become habitual donors. The ideal is to raise more money and have more people involved each year. Retaining past donors, upgrading their gifts, and recruiting more are necessary.

Leadership also surfaced as a key element of success. One interviewee said that the volunteers should view their involvement as a "privilege... if we have to beg for leadership it reduces the importance and prestige." It is critical to make sure that new people become involved; the same chair cannot serve each year. Finally, success will be achieved if the young club members are still involved for many years in the future.

When questioned about the annual UJF Play Day and Dinner event, most of the young club members said the event is "fine." While a nice evening, it is often viewed as predictable and boring. Some suggested the need for a "big name" speaker to attract more young members. It was also recommended that the event should not be the only connection throughout the year; more "touch-points" need to be created. Before the event the "right" leadership must be recruited and pre-solicitation should occur. After the event members need to have opportunities to stay involved. The Federation can acknowledge them and create personal relationships to beneficiary agencies through educational events and mini-missions.

Overall, the young club membership is pleased with the current offerings of social and educational programs. Legislator lunches, summer barbeques, parlor meetings with speakers and mini-missions create a year-long ongoing relationship with the donor, demonstrating that the Federation can provide access to cutting-edge topics in the Los Angeles and Jewish communities. By including families, the volunteers are able to transmit the importance of community involvement and philanthropy to their children.

Areas for Future Focus

While interviewing these country club volunteers, many challenges and suggestions surfaced. They may be viewed in two ways: for the overall Club UJF Campaign and specifically

for younger members. When looking at the overall Club UJF Campaign, the following should be considered:

- There needs to be a better system of tracking pledge cards once these are assigned to a solicitor. The Club UJF Campaign Chair and Federation professional must ensure that the assigned solicitor is connecting with donors, as well making themselves available for any necessary support.
- At least twice a year new members are accepted into the country clubs. These new members are prime prospects to become new donors to the Jewish Federation. Contact and relationships must be developed with this population.
- Promotion of UJF should occur year-round, not only surrounding the Play Day and Dinner event. In each club newsletter there can be something about UJF; this responsibility can rotate between the Federation professional to the overall UJF Chair and the Young Members UJF Chair.
- There is a desire for more intergenerational programming. This effort began at one club's 2004 Play Day and Dinner event where non-member adult sons and grandsons were invited to the day's activities. This can be furthered by having father and son pairs within the golf tournaments and having more family-oriented events. These intergenerational events will help to promote family values of philanthropy and involvement through families engaging with each other at a UJF sponsored event.

Specifically for the young club members, the following should be considered:

- There needs to be more mentorship and guidance from older members. Interest shown by senior club members has the ability to greatly influence the attitudes and giving levels of

younger members. Leadership needs to be organized and recruited through a top-down strategy. The older members can model what is "expected" from the younger members.

- Some of the young members reported being uncomfortable when asking for money. They requested solicitation training from an older, more experienced club solicitor. This was implemented in early 2004. While attendance was light, the training was extremely successful. The young attendees were pleased with the program and all agreed to solicit a substantial number of donors for the 2004 UJF campaign.
- Some young members appear to be confused regarding the actions and purpose of the Jewish Federation. Many of the interviewees expressed concern over the perception that the Federation has problems in its infrastructure and does not run smoothly, and therefore is not a "wise investment." In order for the Club UJF Campaigns to be a success, volunteers must have confidence in the organization.
- Many of the younger Jewish donors are not as interested in contributing to the annual UJF campaign as older generations. They are attracted to more designated giving, wanting to impact those causes most important to them. The Federation is seen as "a black hole of giving," without clear knowledge of who and where the money is helping.
- The young Club Campaigns are still new and growing. Currently there is a lack of clarity within the club membership about the purpose of the young group and the target population. Clearly defined demographics are needed. The current chair of one of the campaigns said he feels as though they are merely taking guesses at whom they are trying to reach. Also, expectations need to be developed of members. If the young groups have a mission and a defined identity within the club, the goals and target populations of the UJF campaigns would be clearer and success would be more easily achieved.

- The young country club membership consists of two distinct populations.
 - One group is composed of members in their twenties to early thirties and on intermediate club member status. Many feel as though they cannot relax at the club as they are still working to secure full membership. This group requested more off-site events. These members are currently forming their professional identities and networking is a priority. Many of these men are from families with club memberships and long histories at the country clubs.
 - The second group consists of men in their thirties to forties who are married with children. Many are established in their careers and are progressing to full club membership.

These two groups have different interests, thereby making it difficult to plan one program or event that gears toward both populations. Both groups enjoyed having social and/or networking events with young members at other country clubs.

Role of the Federation Professional

The Federation professional working at the country clubs serves many roles but primarily acts as the liaison between the country club and the Jewish Federation. It is the responsibility of the professional to become ingrained in the club and cultivate key volunteers. By creating personal relationships and knowing the individual interests of donors, the Jewish Federation will stand out from other charities. The staff person must be knowledgeable about the Federation and Jewish community and be prepared to educate club members about such information in an enthusiastic manner. He or she must be accessible to the volunteer and act in a facilitator role, providing what is necessary to make the campaign successful.

The Federation professional is responsible for background work of the committee and event logistics. He or she represents professional leadership as a skilled facilitator to the volunteers, knowing when to push and when to take a step back. Follow-up to events and pledges is necessary as well as motivating the chairperson and committee.

Overall, every volunteer interviewed had positive things to share about the Federation professionals with whom they had worked. Their passion, accessibility and competence were mentioned. However, there seemed to be two general mindsets. Some volunteers thought of the staff person as a professional whereas others viewed them more in administrative/support roles. This belief influenced the roles they thought appropriate of the staff persons.

V. CASE STUDIES OF JEWISH FEDERATION COUNTRY CLUB OR AFFINITY FUNDRAISING

Case Study #1

Jewish Federation in Northeast City – Affinity Structure

A stockbroker affinity division in this major northeastern Jewish Federation raises thirty million dollars annually with nine professional staff. A system of segmentation is used with over fifty different groups based on different firms. There are also affinity overlaps for Young Leadership and women. Many donors change firms often so it is necessary to remain current with their division associations. Each firm has its own programming, provided by the Federation, including breakfasts, networking events and ongoing Jewish learning.

Motivations for Giving

Motivations for giving are different based on the individual, but general differences between generations have been noted. The more senior volunteers are interested in traditional causes such as Israel and the annual campaign is satisfying for them. The younger donors are interested in more varieties of philanthropy than the Federation has to offer at times. It is necessary to work individually with them, possibly crafting new projects or field-of-interest gifts. They can be convinced to be involved, however the challenge is reaching them in a convenient and intriguing manner.

Within the division, business and peer connections are used to influence philanthropic giving. Expectations are set through active senior management volunteers and the use of card calling at events. Also, being involved at the Federation opens up doors of networking within one's own firm and others. The Federation has situated itself within the professional community as having "something to offer" to young businessmen and women.

What is Success?

Within the division success is defined as dollars raised. Great importance is placed on increasing donors' giving levels. However, success cannot be achieved without having the "right" leadership, with powerful influence and growing careers.

One event is held each year for the entire division. Over 1,000 people attend this one evening. The event is cocktails only for an hour and a half; a dessert is held after for Young Leadership. Keeping the event short is a priority as this cohort is more likely to attend if they know the evening will be direct and to the point. Card calling happens during the dinner. Very few complaints are received, because the Federation is open about the occurrence and the announcement of gifts is voluntary. At or around the annual dinner \$20 million is raised.

One area of success in the division is Young Leadership. An effective cultivation strategy is used whereby influential senior lay leaders will invite a group of young prospects to discuss business and the nature of leadership. This creates a great networking opportunity with colleagues and rare access to senior management persons.

It is important to form relationships with the leadership at a young age, when they are interested in networking opportunities. If a reciprocal relationship is formed at this stage, and the Federation has something the leadership wants, such as business connections, a positive relationship will develop. As the relationship continues to grow, so will the volunteers' philanthropic involvement.

One suggestion was to provide networking opportunities not only for young professionals and up and coming professionals. Holding networking events for graduating MBA students may prove to be beneficial. Forming solid relationships now will provide results in the future.

The division has two Young Leadership groups. One is more socially focused and geared toward people in their twenties. These events are often held at social venues and intend to convey the message that the Federation knows the "winners" in this community.

The second Young Leadership group is geared toward donors in their thirties. Here the focus is placed on creating networking opportunities and placing volunteers on agency boards. These volunteers can be placed as "observers" if they are not yet qualified to be full board members. The message conveyed is that through the Federation, donors can make all the connections they need. It is through involvement that one will meet the right people needed to have a successful career.

Areas for Future Focus

Within the division it was found that the more targeted audience an event has, the more people would come. This is attributed to the simple fact that the smaller an event is, the more noticeable one's absence. Also, senior management will not come to an event unless they are given a central role. One effective response is to ask senior management to host an event, thereby giving them the opportunity to teach young members from their years of experience in the professional field and working with the Jewish Federation.

Due to the magnitude of this division there is not ample time to form relationships and develop new prospects as desired. Also, it is a challenge to be able to hold events in a convenient manner, as the days of a stockbroker are fast-paced and demanding. The division responds by holding events before the market opens at 7:30 AM or after the market closes at 4:30 PM. Also, all events are planned on-site and publicized through interoffice mail. This allows the events to be accessible to even the busiest of donors.

Case Study #2

Jewish Federation in Florida – Country Clubs and Residential Communities

This Jewish Federation in Florida conducts over 25 gated community and country club campaigns. Over 90% of the \$20 million raised annually for the United Jewish Fund comes from these community campaigns. Each campaign functions as a self-contained unit, with a kick-off event, major gifts event, parlor meetings and educational programs. Social rivalries exist between the different clubs, as the clubs are competitive with each other. Therefore, there is little desire to interact between clubs.

The membership of the country clubs and gated communities vary in the percentage of Jewish membership and size. The largest country club residential community has over 9,000 residents and is 95% Jewish. The level of penetration also varies from 12% to 87%. There is often an inverse correlation between the amount of Jewish members and total penetration. This Federation has found that the fewer Jewish members in the club, the higher the penetration since there is a more clearly defined group of members with which to concentrate efforts.

Motivations for Giving

The motivation for giving in these communities is both due to socializing and to social status attainment. The Federation is a large “player” in the community, and being involved is a method in creating a social network and societal standing. The majority of donors are older and retired. It is no longer necessary to make a contribution as a form of business strategy, even though peer pressure still plays a role. Many residents are “snowbirds,” traveling to Florida for the winter months and they continue their deeply ingrained “culture of giving” from their northern communities. It is common for these donors to contribute in two cities or eventually transfer their gifts to Florida entirely. All major events are held in the winter and spring, geared toward “snowbirds.”

What is Success?

Success within these gated communities and country clubs is defined as raising more money each year. However, there are intricacies that must be considered for each specific campaign. For example, many of these communities are shrinking over time. New residents will tear down two homes and instead build one larger home. If this continues at the same pace, communities will be reduced by half their size and the Federation campaign will be diminished. Although these donors represent larger contribution possibilities, there will be less donor units, which may threaten the total campaign.

Caucuses, voluntary announcement of gifts and card calling, occur at club and gated community events. While the donors do not particularly like these methods, they understand their effectiveness and therefore allow the practice to continue. Many of the volunteers come from traditional northern communities, where these practices are performed regularly.

Areas for Future Focus

As this Federation moves toward the future, several challenges emerge within country club and gated community fundraising. One major challenge is that younger generations are not as philanthropic, and it is difficult to "teach philanthropy" to grown adults. Also, much competition exists within the world of non-profit organizations. In this Florida community many other organizations, even northern Jewish Federations, will follow their donors and conduct events during the winter months. There are no clear rules about how to handle this competition; it is mostly ignored. This year, this Jewish Federation will follow its donors up north in the summer months to conduct events.

The Federation staff person interviewed believes that country club and gated community fundraising is the "wave of the future." Segregated living through similar interests is occurring

all over the country and working within the club or gated community system is an effective use of resources. Here the population is mostly retired, though some younger people are involved. Their giving is currently at lower levels because they do not yet have the financial ability to be major donors.

Case Study #3

Jewish Federation in California – Country Clubs

The Jewish Federation in this California community raises \$2.6 million and has a population of 17,000 Jews. Half of the Jewish population are “snowbirds,” living only in the city during the winter months. All events are held in the winter, geared toward the “snowbird” community. The Federation works within country clubs when conducting fundraising. Three annual events at the country clubs raise money for special projects, not in support of the annual campaign.

Motivations for Giving

Since the community is largely populated with people who live locally only during the winter months, fundraising at country clubs is an effective strategy for this Federation. This organized setting allows access to a large amount of potential donors in a short period of time. The money raised at the club events serves to fund special overseas projects. The projects allow part-time residents a way to be active community members, while also continuing to contribute to their hometown Federation. About half of the country club donors also make a commitment to the Federation’s annual campaign. The club members decide the allocation of the money raised at the club events; this totaled \$270,000 in 2003. While the club membership works with the Federation professionals, the country club fundraising events are an opportunity for the donors to designate their gifts in a new and exciting manner. This creates a sense of ownership over their philanthropic commitment and the projects. Often the funded overseas projects will be visited on a later mission.

What is Success?

In the past, four events were held annually, however in 2003 only three were held, due to a lack of volunteer leadership. These three events are held at two country clubs, one event is co-

ed and the other club holds men's and women's golf events separately. Success is defined by the amount of money raised and the number of participants attending the events.

The money raised at country club events is 100% donated to the project selected; no administrative fee is charged. The Federation absorbs these costs, since this is found to be an effective marketing tool with donors.

Areas for Future Focus

The active volunteers are an older population; there is not a large population of younger residents. Many of the donors do not have families that live locally. Due to this fact, there is little interest in intergenerational events as there is no "next generation" in town. However, there is a growing number of younger people who are buying second homes in the community. This is a possible future target for Federation involvement and contributions.

The Federation has found the recruitment of dedicated volunteers to be a significant challenge. When working with country clubs, volunteers are the only access point to other club members. Their hard work and dedication is necessary for the running of a successful campaign or fundraising event. Also, there is increased competition within the country club fundraising world. New clubs are always opening and memberships change; numerous charities are attempting to create relationships within the country club structure.

There is a correlation between how well the club is doing and the level of philanthropic giving of club members. Country clubs that are losing members have difficulty finding volunteer leadership and do not conduct successful Federation fundraising events. The Federation believes that there is a limited future to country club fundraising. The money raised here may be used to supplement the annual campaign and in some cases may answer the emerging need for more directed giving.

VI. RECOMMENDATIONS/CONCLUSIONS FOR LOS ANGELES

Recommendations:

- Young members:
 - Two distinct groups of young members
 - Twenties and low-thirties, single and without families, forming careers
 - Thirties and forties, married with families, well-established in careers
 - Different events appeal to each group
 - More social events, off-site club premises
 - Unclear purpose and priorities of Young club membership
 - Need more clearly defined demographics
 - Create a mission and charter clearly stating purpose and priorities of young club membership and relationship with UJF
 - Form young club identity
 - Have a yearly young club event
 - Have young club team and awards during annual UJF Play Day and Dinner Event
 - Interests for Future
 - Networking Programming
 - Programming between both young clubs
 - Mix of young and older club membership programming with a networking focus
 - Focus on leadership cultivation
 - Interest in intergenerational events (with their parents and/or children)
 - Send questionnaire to all young club members asking about their interests
- Tracking of member's children
 - Involve children in contributing to UJF, establishing a "culture of giving"
 - Keep in contact throughout transitional periods.
 - Invite with parents and grandparents to events
 - Send graduation and other life-cycle congratulations
- More UJF promotion
 - Make involvement with UJF year-long, not only at annual event
 - Promote UJF in each country club newsletter
- More contact before and after event
- Need for new leadership: not to repeat chair for consecutive years

Areas to Explore in the Future:

- Examination of what is meaningful to the members' Jewish identity and their affiliation patterns
- Longitudinal study of country club membership and their donations and involvement
- Comparison of country club membership to traditional east coast communities where there is community pressure for contributions and involvement

Conclusions:

- If a country club member understands the intricacies of Federation they think their peers do as well. However, if the member does not fully comprehend Federation they assume their peers do not as well.
- Being a member of the club affects a member's giving. Seventy-five percent of interviewees said their membership positively affects their contributing to Jewish Federation. The remaining 25% said their motivation was due to their family values or a personal relationship with a Federation beneficiary agency.
- Country club members are more likely to take on leadership roles in the Los Angeles Jewish Federation when compared to other donors. In 2004, 48% of the Los Angeles Federation's Board of Directors and 66% of the Campaign Cabinet are members of the two major Jewish country clubs.

There are many unique characteristics about country club members and conducting UJF fundraising campaigns. As stated in the report, there is a limited audience of individuals, an "obligation" to contribute, and a heightened financial potential of members. Also, much of the membership has family history with the Los Angeles Jewish Federation through the country clubs. However, after exploring motivations for involvement and opportunities for improvement, it was found that country club members are not completely unique. They need the same cultivation and personal relationships as other donors. This has been demonstrated through the increased campaigns in the country clubs over the past three years. This increase is largely due to more professional staff time devoted to the country club UJF campaigns. There is great potential for campaign growth and leadership within the country clubs if these practices continue. The members' reasons for initially becoming involved with the Jewish Federation might be because of their club membership, yet their continued leadership is due to their dedication to the cause and feelings of communal responsibility.

VII. APPENDIX

Letter of Intent to Lay Leadership

October 15, 2003

Name

Address 1

Address 2

Dear firstname,

X Country Club members, through their contributions to the United Jewish Fund, support the work of The Jewish Federation throughout the Los Angeles community, in Israel and around the world. Each year the UJF responds to increasing community needs. It is because of these growing needs that we are constantly working to improve our ability to help those in need.

We are currently undertaking a project that will evaluate the effectiveness of the UJF contact with country clubs. Abbey Bittel, a graduate intern from the University of Southern California and Hebrew Union College, will be spearheading these efforts. With your consent, Abbey will be contacting you in the near future to introduce you to the project and ask you a series of questions designed to help us evaluate UJF and its impact in the Club. In the meantime, she can be reached at (323) 761-8226, or by e-mail at Abittel@JewishLA.org

As a valued leader of our Community, we would greatly appreciate your feedback on how the UJF Campaign is conducted annually at X. We look forward to hearing your thoughts and suggestions. Please feel free to contact me if you have any questions or comments. I can be reached at (323) 761-8313 or by e-mail at DBen-Shimon@JewishLA.org

Best regards,

Dov Ben-Shimon
Major Gifts Associate

Questions for Lay Leadership

Introduction:

- Explain purpose of meeting regarding project and relationship between UJF and country club
 - Want to know what is working well in the club campaigns and relationships and how we can always be striving to make that better.
1. What are the motivations for giving?
 - Tell me about your involvement with the Federation
 - What was it that brought you involved in the Federation system?
 - Does club membership (club campaign experience) influence your giving?
 - To what extent do you think your experience represents others here at the club?
 2. Best Practices of country club campaigns – what works and what does not? Which format is best?
 - What do you think constitutes a successful campaign?
 - What do you think is effective about the Federation's campaign here?
 - What do you think is ineffective about the Federation's campaign here?
 3. Solicit ideas and suggestions for improvements of campaign and things to discontinue
 - What would move your club to the next level? How can UJF help? What aren't we doing?
 - Do you have any ideas or suggestions for the future?
 - What do you like about the way the campaign currently runs here?
 - What should we continue?
 - What should we discontinue?
 4. Define the role of the Jewish Communal Professional. What makes the professional successful?
 - What role does the Federation professional play in running the UJF campaign?
 - What would make this professional successful?

Questions for Case Studies

Goals:

- Speak with three federation communities and establish their best practices of country club fundraising
- Compile data in a way that other federations will be able to apply best practices to their local communities, particularly Los Angeles

Questions to Ask:

- What constitutes a successful campaign?
 - Quantitative yardsticks to gauge success:
 - What we use here:
 - # of pledging donors
 - increasing gifts
 - decreasing gifts
 - flat gifts
 - new gifts
 - skips
 - average gift per donor
- What works well?
 - Run through a basic year
 - What events? Culmination or kick-off
 - Lay people: demographics
- What doesn't work well?
- What are current challenges?
- What's the social capital of Country club efforts?
- Qualitative piece:
 - What is the mood of the club?
 - Is there a future to country club fundraising – getting better each year or not?
 - Is there a difference between generations? If someone grew up within the club?
 - Is there a link between how well the club is doing and how much the club members give philanthropically?
 - There is in Los Angeles
 - When the club is more family-oriented it helps to keep the philanthropy up
 - Also linked the other way around – if not interested in philanthropy the club is doing poorly