



Call Script - Sample

NOTE: Please use this script only as a guideline. Have a friendly tone with your prospects, as they will be more likely to want to donate if they feel like they're having an actual conversation rather than listening to someone just reading a script!

Before you call, familiarize yourself with the potential donor. Information on worker reports and pledge cards might give you an idea of their past giving history, synagogue affiliations, Reflector subscribership, built in ASK amount for this campaign and more! Get to know the person's name and/or their spouse's name.

While the current economic climate is challenging for each of us, it takes the greatest toll on the most vulnerable. As a direct result of these economic problems, members of our community need our support more than ever.

Contributing to the Jewish Federation's annual campaign assures that each gift, regardless of amount, will be distributed in an equitable manner. This careful process of maximizing the efficiency through which campaign funds meet community needs is done on behalf of all Federation donors by a non-partisan allocations committee.

Thanks to the dedicated work of our volunteers, we are able to maintain low overhead costs enabling us to allocate a greater percentage of every dollar.

CALLS TO PAST DONORS

Shalom, [USE NAME]! My name is ____ and I am volunteering for the Jewish Community Federation! How are you doing?

We are calling every member of the Jewish Community to give them an opportunity to transform, inspire, and save lives today!

"I see you have been a great supporter of Federation [What's been the most rewarding part of that?/How did you get involved?]" **REALLY LISTEN!** When community members share their history, their interests, and their passions, it's really important that we listen. This can guide how the conversation can develop—and possibly future programming.

"Thank you so much for your past generosity, these last few years have been difficult for so many, would you consider increasing your gift to \$[ASK AMOUNT]?"

IF ANSWER TO INCREASE IS NO:

If the donor says no, refer to the "responding to donor concerns" worksheet. Concerns could be opportunities for more education. You could also try breaking it down into more manageable terms. "How about an extra \$52? That's only an extra dollar a week."

If still NO: "Are you in a position to renew your gift of \$[LAST GIFT]?"

IF ANSWER IS YES TO ANY GIFT:

"Thank you for your generous contribution! For your convenience, we accept Visa, MasterCard, American Express and Discover. If you'd like, I can take that information from you now." (Enter payment through website) If the person doesn't want to pay over the phone, thank them and say we'll send them a bill that doesn't have to be paid until December 31, 2024.

Verify the gift before you hang up: "An acknowledgement of your pledge of \$[AMOUNT] will be mailed to your home. Is your address still [ADDRESS]? I'd also like to confirm your email address; is it [EMAIL]? On behalf of the Jewish community, thank you for taking the time to speak to me, and thank you for your generosity." Enter this

pledge on your worker report/pledge card.

IF ANSWER IS ABSOLUTELY NO:

“Thank you for your time [NAME]. I hope we can count on you in the future. Can I send you some information about the important work your Federation has been doing this year or can I sign you up for our weekly eNews?”

CALLS TO POTENTIAL NEW DONORS/PROSPECTS

“Shalom, [USE NAME]! My name is _____ and I am volunteering for the Jewish Community Federation of Richmond! How are you doing?”

We are calling every member of the Jewish Community to give them an opportunity to transform, inspire, and save lives today!

Would you consider making a contribution to help support the Jewish community this year? A gift of [\$18 or ASK AMOUNT] would help so many during these difficult times.”

IF ANSWER IS YES TO ANY GIFT:

“Thank you so much for your contribution! Your dollars will make a difference! For your convenience, we accept Visa, MasterCard, American Express and Discover. If you’d like, I can take that information from you now.”
(Enter payment through website)

Verify the gift before you hang up: “An acknowledgement of your pledge of \$[AMOUNT] will be mailed to your home. Is your address still [ADDRESS]? I’d also like to confirm your email address; is it [EMAIL]? On behalf of the Jewish community, thank you for taking the time to speak to me, and thank you for your generosity.” Enter this pledge on your worker report/pledge card.

IF ANSWER IS ABSOLUTELY NO:

“Thank you for your time [NAME]. I hope we can count on you in the future. Can I send you some information about the important work your Federation has been doing this year or can I sign you up for our weekly eNews?”

BREAKDOWN OF GIFTS INTO MANAGEABLE TERMS

\$36 = \$3 a month

\$52 = \$1 a week

\$80 = \$1.50 a week

\$100 = less than \$2 a week

\$180 = less than 50 cents a day

\$250 = less than \$5 a week

\$365 = \$1 a day

\$500 = less than \$10 a week

\$750 = less than \$15 a week

REMEMBER: All donors have until December 31, 2024, to pay off their full pledge commitment.



Responding to Donor Concerns

Objections are an opportunity for dialogue and an opening to a conversation. **HANG-UPS HAPPEN—IT'S NOT PERSONAL!**

WHY TWO CAMPAIGNS?

- **Annual Campaign:** Building and sustaining a vibrant, inclusive, and welcoming Jewish community for today and tomorrow. It supports education, cultural understanding, fights antisemitism, and provides security for our community. All are crucial for a thriving Jewish community.
- **Israel Emergency Campaign (IEC):** Vital in times of crisis for the people of Israel, addressing immediate humanitarian needs.

HOW ARE WE USING ISRAEL EMERGENCY CAMPAIGN DOLLARS?

"Jewish Federations draw on local expertise to address the most pressing needs of the residents in the affected regions through existing relationships with key NGO partners and local government decision-makers. Funds are allocated promptly to 143 organizations for various needs: moving vulnerable populations, supporting medical centers, and more."

WHAT IF I ALREADY GAVE? (CONFUSION ABOUT ANNUAL AND IEC GIFTS)

"Both campaigns are essential. The Annual Campaign supports day-to-day needs of Jewish life locally and globally. The Israel Emergency Campaign directly aids humanitarian efforts for those affected by the events of October 7th in Israel."

I JUST GOT A LETTER AND WILL SEND IT BACK

"I can save you a stamp and put your dollars to work right away. Can you please let me know the amount you intend to pledge? You will have until December 2024 to pay in full."

TIMES ARE TOUGH

Because of the current economic climate people need your help more than ever. Every gift, regardless of size is important. **You have until the end of 2024 to pay this pledge.** *(If donor is in need of social services please refer them to Jewish Family Services and let a Federation professional know – they are there to help.)*

ALREADY GIVEN

"THANK YOU for your support. Are you sure your gift was to the 2024 Annual Campaign?" Ask for specific amount so that we can verify our records. *(Note: There may be some confusion with pledges made to the previous year's campaign.)*

GAVE TO OTHER CAUSES

"Thank you for living generously by supporting important causes. The Federation's Annual Campaign supports Jews and non-Jews locally, nationally, and around the world, including Israel. These ongoing needs in our Jewish community are rapidly increasing and we are asking for your support."

I ONLY WANT TO GIVE LOCALLY/OVERSEAS

Our Annual Campaign supports many programs here and overseas. The needs are great everywhere. I would be happy to have someone call you to discuss this in greater detail. *(Refer concerns to professional staff.)*

DOESN'T LIKE HOW MONEY IS ALLOCATED

"The Allocations Committee, made up of community volunteers, works with agencies to understand their needs and decides how campaign dollars can make the greatest impact."

DON'T KNOW WHERE MONEY GOES

"About 70% stays within the community to support those in need through our local agencies. About 30% goes overseas to support the work of the Jewish Agency for Israel and the American Jewish Joint Distribution Committee (JDC). These agencies are responsible for rescue, relief, and rebuilding of Jewish communities world-wide." "These partnerships and infrastructure already in place were how we were able to mobilize emergency Ukraine donations so quickly."

SAME AS LAST YEAR

"Costs have increased for everything from security to basic amenities. The same gift as last year simply won't go as far."

UPSET WITH ISRAEL

"Funds go to support the people, social services and humanitarian needs. None goes to government or military. Can I have somebody at Federation follow-up?"

JUST MAIL ME MY CARD/SEND MORE INFORMATION

"We would prefer to know a specific dollar amount today so that your pledge can be put to work immediately. Confirmation of your pledge will be sent in the mail. You should have just received a letter in the mail that includes your pledge card." *(We will mail card/info if necessary - confirm address and get email.)*

NOT HAPPY WITH FEDERATION OR AGENCY

(Get a sense of their concern and always inform a Federation professional.)

"Let me find the appropriate person to address your particular concern."