

**VOLUNTEER-
FUNDRAISING**

WAYS TO RAISE:

UJA'S 2026 GUIDE TO FUNDRAISING



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THE POWER OF VOLUNTEER FUNDRAISERS

UJA's Annual Campaign is the vehicle through which we address the most pressing challenges facing the Jewish people here in the Greater Toronto Area, across Canada, and around the world. Because of the Annual Campaign, we can invest in a wide array of Jewish programs and institutions addressing Jewish poverty, countering antisemitism, promoting Jewish education, growing Jewish identity, deepening our connections with Israel, and so much more. The Annual Campaign enables us to strengthen the well-being of our community today, while securing and building our Jewish future. We couldn't raise the dollars needed for these critical goals without the help of volunteer fundraisers like you.

Last year volunteer fundraisers raised more than \$24 million. This makes an incredible difference for our community, lowers UJA Federation's operating expense ratio, and helps ensure we remain among Canada's top-rated charities. Your role is indispensable to the success of the Annual Campaign, and through it, the Jewish community itself.

Thank you for collaborating with us to build up this community. We look forward to working with you to make UJA's Annual Campaign a success!



VOLUNTEER FUNDRAISER QUICK TIPS

A QUICK REMINDER

**Use this checklist during a canvass to make sure you go through the most critical stages in the process.
Keep this handy during your conversations with donors.**

- Know your donor by reviewing their past giving and speaking to your UJA team member if you have any questions.
- Try to schedule a face-to-face conversation (in person, Zoom, or FaceTime instead of a phone call) and, where helpful, invite a UJA team member to join.
- Make the ask! Aim for the highest amount you think this donor could give, if inspired. Refer to your donor card for a recommended amount to ask for.
- Confirm the pledge amount and ask the donor for their preferred payment method.
- Thank the donor for their generous gift before concluding the canvass.
- After you confirm a gift, we require written confirmation. Please send the donor an email thanking them and confirming their gift amount, and cc your UJA Professional.
- Complete UJA's online Volunteer Fundraiser Submission Form by visiting: jewishtoronto.com/volunteer-fundraising or contact your UJA professional.

WHY UJA

UJA IS BUILT TO UNLOCK THE FULL POTENTIAL OF OUR COMMUNITY TO MAKE THE GREATEST IMPACT.



POWERFUL PARTNERSHIPS

Through close partnerships with more than 100 Jewish organizations locally, nationally, and globally, we convene, collaborate, and bring out the very best in the Jewish world.



RAPID IMPACT ON A MASS SCALE

By mobilizing the strength of thousands of donors, volunteers, and professionals, we work together to move quickly and decisively to meet emerging needs and emergencies.



DATA-DRIVEN SOLUTIONS

Through a 360-degree view of Jewish life, UJA's planners and data scientists use in-depth research, field-testing, and measurement to identify urgent needs—as well as innovative solutions.



ACCOUNTABILITY AND LEADERSHIP

Through a rigorous process of priority setting, oversight, and transparency, UJA's professionals and lay leadership ensure every dollar is maximized and anchored in a clear strategy for our community.



LOW OVERHEAD

By maintaining low operating costs, UJA Federation is able to maximize the impact of every gift. Over the past five years, UJA's overhead is 9.7 percent of total fundraising revenue, well below the sector average of 35 percent reported by Charity Intelligence Canada.



MAKING YOUR MONEY GROW

For every dollar donated to UJA's 2024 Annual Campaign, we have generated 47 cents in matching investments through government grants, private foundations, and other strategic partnerships.



STRATEGIC ALLOCATIONS

Money raised is strategically allocated to where it's needed most.

FUNDRAISING TIPS & BEST PRACTICES

BE PREPARED.

Having facts at your fingertips is valuable in answering questions. Practicing with a family member or trusted friend can help polish your technique before you start reaching out to donors.

>> *For facts and data about UJA, and information on the key issues and priorities of the Annual Campaign, take a look at the latest Impact Report.*

BREAK THE ICE.

Be warm and sincere, rather than jumping immediately into the pitch. Start by asking how they are doing and thanking them for their past support. If you feel they are in the middle of something or sense it is not a convenient time for them to connect, arrange a time that works best for them.

BE PREPARED TO SHARE.

Your call is an opportunity to make a Jewish connection. The most effective canvasses are ones where a personal relationship has been established. As a volunteer fundraiser, why is community important to you and why are you giving your time to the community? Listen to their story and be prepared to share yours. Every interaction should be a conversation—a dialogue as opposed to a monologue. They want to feel inspired, engaged, and to be given a clear sense that their gift has a real impact.

REMEMBER: YOU ARE GIVING SOMEONE THE OPPORTUNITY TO GIVE BACK.

Be optimistic and upbeat about the fact that you are providing an avenue for a caring community member to give *tzedakah*.

KNOW YOUR DONOR.

Personalize the conversation by getting to know your donor before you call. Have they donated in the past or are they new to UJA? Has there been a long lapse since their last donation? Read all the information on the donor's pledge card. The more information you have before you pick up the phone, the better equipped you will be for the call. Talk about their past support and provide a short update on the impact it made.

IF THEY ARE RECEPTIVE, INVITE THEM TO CONNECT YOU WITH OTHERS.

Tell them we would really appreciate their help in spreading the word about our community's needs and how UJA is helping to address them: "is there anyone you know who you feel would be interested in helping?"

USE ACTIVE LISTENING.

People are most receptive when they have an opportunity to be heard. If you are on a video call, observe their body language, tone of voice, etc. Give them space to share and respond to their observations empathetically and honestly. You may want to ask questions to encourage them to open up. After making an ask stop and listen. It's important to be patient and allow the donor to take the next step in the conversation. Remember, too, that sometimes a longer conversation is needed to allow donors to feel comfortable making their pledge.

START BIG.

Your first ask should be the highest that you believe the donor is in a position to give. Suggested amounts can be found on the donor pledge card. If they say they are not in a position to increase their gift, ask them if they can renew their gift from last year at the same level.

>> *For tips on how to do this effectively, see the section "Asking donors to increase their gift."*

SHARE MORE DETAILED INFORMATION.

If they want to know more about how their gift last year made a difference, send them a copy of UJA's most recent Impact Report. If they want to know more about UJA's top priorities this year, send them a copy of Why UJA. If they want a financial breakdown of how UJA Federation invests in the community, send them a copy of our most recent Annual Report. If they are interested in learning more about a specific aspect of UJA's work, reach out to a UJA team member and let us know. We have other reports and briefs on specific issues we can share with them.

DON'T BE AFRAID TO SAY: "I DON'T KNOW THE ANSWER, BUT I'LL FIND OUT!"

If you get a question that you are not sure how to answer, let the donor know you will get back to them after you follow up with a UJA team member (and don't forget to do so), or let the donor know that a UJA team member will follow up with them directly.

CONNECT IN-PERSON, BY ZOOM, MICROSOFT TEAMS, OR FACETIME.

Though in-person meetings are always more impactful, video calling also allows you to make a compelling face-to-face pitch. If you require technical support, please don't hesitate to reach out to UJA's professional team.

WHEN CLOSING THE CONVERSATION, CONFIRM THE PLEDGE AND PAYMENT PREFERENCES.

Remember to confirm the pledge amount at the close of the conversation and record any details or preferences they may have about their payment.

GIVE THANKS.

Regardless of how the conversation goes and its outcome, be thankful and professional at all times. Acknowledge especially any increases they make to their gift, and express our deepest gratitude for their generosity. Your kindness, understanding, empathy, and willingness to listen all send an important message about our values as a community.

>> *Remember: If they can't donate today, they may likely be able to do so in future. Your relationship with a donor is a marathon, not a sprint.*

FOLLOWING UP.

Not every donor will pick up their phone the first time you call. If they don't call you back, you can try connecting with them again about a week later. After you make three calls, follow up with an email and let a UJA team member know.

REPORT BACK.

Please visit jewishtoronto.com/volunteer-fundraising to complete our online form following each canvass, or contact your UJA professional.

MAKING THE ASK

Here's how you can ask donors for an increase in their annual donation in the most effective and positive way possible.

PREPARE TO ASK A DONOR FOR AN INCREASE.

Check the donor pledge card for our recommended increase ask before contacting the donor.

Prepare to ask for an actual dollar amount increase—not a percentage increase. Donors react more positively to a request for a specific amount.

Be transparent. Tell your donor that we are asking every UJA donor to consider increasing their pledge (as opposed to “we are asking you to increase your pledge”).

START BY EXPLAINING “THE WHY.”

Help donors formulate a clear idea of the overall goals they want to achieve. We recommend you give one (or more) of the following reasons when asking for increases:

Our community needs your help. Consult the Why UJA document and learn how the needs have evolved, and why more support is needed.

We need to keep up with rising inflation. Inflation and the rising cost of goods and services is making it more expensive to deliver the same programs over time.

UJA recognition levels and perks.

>> For women giving under \$5,000, let them know that \$5K is a Lion of Judah gift.

>> For those who have capacity to increase to the Major Gifts (\$10K) or Top Gifts (\$50K) divisions, please speak to your UJA team member about the best way to ask.

ASKING FOR A DONATION.

Begin by asking for the increase and then ask for the full amount of their previous gift if they do not want to increase.

OVERCOMING RELUCTANCE TO INCREASING THE DONATION.

One way donors can increase their gift is by switching from a single payment for their annual gift to a monthly payment plan. They could then spread out the increase across many months. For example: a donor who gives \$5,000 annually could instead give \$500 monthly—this would add up to \$6,000 annually, spread out over the year.

>> For donors who pay in monthly installments: consider asking for an increase to their monthly installment or, if their payments spread over less than 12 months, ask them to consider an additional monthly payment for the same amount. For example: \$88 to \$100 per month is a 14% increase. Turn \$100 over 10 months into \$100 over 12 months, which increases the donation by \$200.

ALWAYS KEEP IT POSITIVE.

If the donor does not choose to increase their gift, **thank them for their ongoing support.** Whatever the result, we remain grateful for their donations. Make them feel appreciated.

WAYS TO GIVE

There are several options for payment of pledges:

- 1. WE CAN CALL THE DONOR** A member of UJA's professional team can call the donor so they can pay over the phone.
- 2. THEY CAN CALL US** Our UJA hotline number is **416-631-5705**. A member of our professional team can process the donor's payment by phone.
- 3. PAY ONLINE** ujadonations.com/payment
- 4. PAY BY INTERNET/ TELEPHONE BANKING** Select "United Jewish Appeal of Greater Toronto" as payee and include your UJA number in the message.
- 5. PAY BY MAIL** Send a cheque to: United Jewish Appeal, **Sherman Campus 4600 Bathurst Street, Toronto, ON, M2R 3V2**.
- 6. PAY BY E-TRANSFER** Send to donorservices@ujafed.org and include your UJA number in the message.
- 7. STOCK PAYMENTS** Get transfer forms at ujastocks.com or contact stockdonations@ujafed.org or **416-631-5830**.

Payment timing: Schedule your payment when it is convenient for you. You can make a payment today, next month, or divide your gift into multiple payments. While your full payment is not formally due until December 31, 2027, we prefer you pay your gift in full by December 31, 2026, if possible. This allows UJA to plan and allocate our programming budget for the coming year.

Monthly giving: Making an ongoing monthly gift to UJA provides a steady, reliable source of funding to help us consistently tackle the biggest challenges facing the Jewish people, and strengthen Jewish life every day of the year. A monthly donation will be deducted from the donor's account automatically every month on the day of their choosing. They will receive a consolidated tax receipt by email for all their monthly contributions twice per year.

To set up monthly giving, donors can go online to jewishtoronto.com/donate, or you can take their pledge. Our donor services team will then follow up with them.

Automate your giving: Endow your gift to UJA through the Jewish Foundation. Simply multiply your annual gift by 25 and have your donation go through automatically every year. For example, open a fund for \$25,000 if your Campaign gift is usually \$1,000, and let us handle the rest.

Contact us today at **416-631-5703** or jewishfoundation@ujafed.org to learn more.

THANK YOU FOR BUILDING UP THE JEWISH PEOPLE AND STRENGTHENING JEWISH LIFE.

ANY QUESTIONS? CONTACT YOUR UJA TEAM MEMBER
OR GENNY DOZORTSEV AT [GDOZORTSEV@UJAFED.ORG](mailto:gdozortsev@ujafed.org)



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UJA