

Underwriters help keep fund-raising overhead down

BY PAUL HAIST
Jewish Review

Everybody knows the saying that it costs money to make money. That's as true for charitable organizations as it is for startup mom-and-pop businesses and big corporations.

When the Jewish Federation of Greater Portland launches its annual campaign each year, campaign planners know that they won't get something for nothing.

To raise money for the best of causes requires infrastructure, labor and, in the case of Jewish communal fund-raising—as well as others, it typically also requires outreach events where potential donors can come together to learn why their support is necessary and where they can be motivated to make the decision to give.

That fund-raising model has been in place here and across North America for a very long time because it works.

However, planning and producing an event that will attract a sufficient number of people across the demographic spectrum comes with a cost. If that cost had to be paid from campaign revenue, there would be that much less money available at the end of the campaign for all the important activities that the federation campaign supports, all the reasons that people give.

Most people understand the need to invest in the fund-raising process, but everybody wants that investment kept to a minimum in order that donor dollars can do as much good as possible. If the fund-raisers fail to keep costs down they will hear from the donors.

To get around that challenge, Jewish federations and others have turned to a system of underwriting. When you attend a federation event in Portland (and many other Jewish events), you will almost always see listed in the programs the names of the underwriters who made the event possible.

JFGP Director of Marketing and Communications Josh Stein summarized the broad objective of the underwriting program. "The corporate sponsorship program was created to forge partnerships with local



ROB SHLACHTER

businesses as we work together in the common cause of improving the quality of life in Portland and beyond."

In the Jewish community, these underwriters often include companies that are home to Jewish leaders, individuals who support the federation and other Jewish groups completely apart from their professional life.

That is the case with one of this year's leading underwriters of JFGP campaign events, the law firm of Stoll Stoll Berne Lokting and Shlachter.

Former federation president Rob Shlachter is a partner at Stoll Berne. He said his firm has been a federation underwriter for six or seven years.

"We like to support good organizations in the local community," said Shlachter. "We feel federation reaches a lot of people and serves a lot of people. Our underwriting expresses our commitment to the community."

He noted that Stoll Berne has been in the top 10 in their size category for philanthropic activity here. That includes both dollars spent and time volunteered.

The firm was honored on Oct. 1 at Portland Business Journal's Corporate Philanthropy Awards luncheon.

Speaking as one of the JFGP's top volunteers, Shlachter made a straightforward case for underwriting from the federation's point of view.

"It helps bring people in and increases the bottom line of the federation campaign," he said. "It's critical because the sponsorship dollars allow more money to go to the recipients of federation funding."

Stoll Berne's support for federation is at the \$5,000 level, the top level this year, where they are joined by The Don Rasmussen Company and Morgan Stanley, according to the JFGP's Stein.

Of total underwriting support this year Stein said, "We have raised \$30,000 to date with sponsors still stepping forward. Last year we raised \$67,000 and we are off of that pace, but there is still a lot of time remaining in this fiscal year."

Besides providing additional resources

to the federation, Stein said, "This program brings together individuals and businesses that share our vision of strengthening the community. In recognition of the generous support of our sponsors, we strongly encourage the community to recognize and patronize these businesses.

Alongside Stoll Berne, Don Rasmussen and Morgan Stanley, other key underwriters this year include Aspen Companies, Dunn Carney Allen Higgins and Tongue LLP, Geffen Mesher and Company P.C., Heritage Rock, Kenny and Zuke's Delicatessen, Mutual of America, New Seasons Market, Packouz Jewelers, Samuels Yoelin Kantor Seymour and Spinrad LLP, Steinberg Aley Wealth Management, Stoel Rives LLP, Sussman Shank LLP, Thompson/Rubinstein Investment Management Inc., Rena Tonkin and Cheryl Tonkin, Tonkon Torp LLP and West Coast Bank.

Those dollars we send to UJC? A lot of them come back here

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Jewish federations around North America and the communities they serve receive many benefits from their alliance with United Jewish Communities, Jewish Federations of North America, the federation system's umbrella organization.

Each Jewish federation allied with UJC helps fund UJC from their annual campaign revenue. It's called a Fair Share. The Portland federation's fair share is about \$150,000 per year.

The benefits that come back to the local communities take many forms.

For example, UJC staffing experts have helped the Jewish Federation of Greater Portland develop search criteria for a successor to JFGP Executive Vice President Charles R. Schiffman who announced his retirement earlier this year. The same expertise is available to all Jewish federations. Similarly, UJC develops programming



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and provides campaign support at the national level that can be implemented at the local level, thereby avoiding costly duplication of services while creating a uniform trademark for the nationwide Jewish community.

The dollars that our community provides to UJC are not lost to this community. They help fund important administrative and other services that are available to or benefit every Jewish community.

One very important example is the office UJC maintains in Washington, D.C. That office speaks on behalf of Jewish communities across America on matters that make a difference in the lives of Jews and others right here in Oregon.

Jewish Family and Child Service Executive Director Marian Fenimore knows just how important the UJC Washington office is.

She spelled out a process in which the UJC Washington office helped facilitate legislation that provides funding to local communities, including Portland, to help pay for important human service programs.

"The UJC has been instrumental in helping JFCS agencies throughout the country develop and maintain and acquire grants," she said, including also successfully recommending enabling legislation in Congress.

In Portland those grants have helped support JFCS programs for Naturally Occurring Retirement Communities (NORCs).

A NORC is created as people of a similar age group move into an area and then grow older there. The first NORC in which JFCS played a role was along the Beaverton-Hillsdale Highway where many new Russian immigrants, mostly Jews, settled in the 1990s. Today, JFCS is working with another NORC in North Portland.

Fenimore said UJC "has helped us advocate for the receipt of funds through the legislative process" and "they also have helped in providing information to us about other federal grant projects."

Frances Spak administers the JFCS NORC program in North Portland, which she said is underwritten by grants from the Health and Human Services Administration.

"The original idea for this came from



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Join us on **December 6, 2009** for Federation's campaign telethon in Hoffmann Hall at PSU.

To volunteer for a **2-hour shift** contact Josh Stein at 503-245-5641 or www.jewishportland.org.

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