

## IMPORTANT INFORMATION FOR LEADERS ABOUT HADASSAH'S ANNUAL GIVING PROGRAM

HADASSAH



*Effective as of January 1, 2016*

*Please review the [Helpful Information about Hadassah's Annual Giving Program](#) provided to new Annual Givers, as well as key policy changes and FAQs below. Feel free to contact the National Development Division at any time should you have any questions.*

800.928.0685 ~ [annualgiving@hadassah.org](mailto:annualgiving@hadassah.org)

*Thank you for your leadership and support of Annual Giving in your Unit. Your efforts are critical to growing this vital program which provides essential income to ensure our mission continues.*

### Five Key Annual Giving Policy Changes Every Leader Needs to Know:

1. Being a part of Hadassah's Annual Giving program is defined by an annual, recurring commitment to be completed by December 31st of each year. (For more info, see FAQs 1-3)
2. If a new annual giver joins during the year (after January) on an installment plan, the first year will be a partial year. (For more info, see FAQs 4, 9-10)
3. Each January, the annual giver's yearly commitment will remain the same, unless the donor instructs otherwise. (For more info, see FAQs 5-8)
4. Annual givers are considered in "Good Standing" if they have not missed a payment per their payment schedule. (For more info, see FAQs 11, 13)
5. Annual givers are marked "Lapsed" after 12 months of missed payments. They will no longer receive quarterly statements and will be placed in a file for further action. If there is no response to further outreach, the annual giver will be marked "Former" and the annual commitment will be closed. (For more info, see FAQs 12)

## Annual Giving – Frequently Asked Questions:

**Q1: Do current annual givers who do not have an installment payment plan, need to change when they currently pay? For example, if someone has been paying their annual gift in full each June, or in two payments in March and July, can they continue to do so?**

A1: No change is needed! The donor can continue to pay their annual commitment in one or more gift payments each year, at any time during the year, as long as the annual commitment is paid in full by December 31<sup>st</sup> of each year.

**Q2: Do current annual givers with an installment payment plan need to change their current installment payment plan schedule?**

A2: No change is needed! Current installment payment plans can remain as-is.

**Q3: If a current annual giver does not have an installment payment plan and wishes to set one up, can the payment plan start at any time of the year? How will that work?**

A3: Yes, donors can request a new installment payment plan (or change or cancel an existing installment payment plan schedule) at any time by contacting the Development Division helpline.

When setting up a new installment plan, the monthly payment amount will be calculated based on the total annual giving commitment (for example \$83.33/month for a \$1,000 Traditional Keeper). To complete the full annual giving commitment by December 31, the donor may request the payment amount to be adjusted accordingly or make additional payment(s) to complete the full annual giving commitment.

**Q4: When a new annual giver wishes to set up an installment payment plan, how will that work?**

A4: The monthly payment amount is calculated based on the total annual giving commitment (same as above); however the first year will be a partial year in terms of the annual commitment.

For example, the monthly installment payment amount for a new Silver Chai Society donor (\$360/year) will be \$30/month. Someone who signs up in June would pay \$30.00/month for 7 months (June through December), and continuing each month thereafter.

**Q5: Will annual giving commitments and installment payment plans in place automatically continue each year?**

A5: Yes! Each January, the annual giver's yearly commitment will reflect the same amount as their prior year's annual commitment, unless the donor instructs otherwise. Installment payment plans in place will also continue until the method of payment is cancelled or transferred by the donor to another credit card or method of payment. The donor may cancel the recurring payment plan option at any time by contacting the Development Division helpline.

## Annual Giving – Frequently Asked Questions:

**Q6: What happens if someone changes their annual giving level during the year? For example, steps up from Traditional Keeper to Chai Keeper, or increases their annual commitment within a level?**

A6: Of course this is exactly what we hope our annual givers will want to do – increase their annual giving commitment within a level or to the next level. They can do this at any time! The Development Division helpline will be able to adjust their annual giving commitment. If the donor has an installment payment plan, the monthly payment amount will be adjusted based on the new annual commitment. For example, the monthly installment payment for a Traditional Keeper stepping up to Chai Keeper, would increase from \$83.33/month to \$150/month.

**Q7: What happens if someone doesn't complete their annual commitment and has a remaining balance at the start of the new year? What will they see on their statement?**

A7: If the donor has a balance from the prior year commitment, both the prior year and the current year's commitment will be reflected on their quarterly statement.

**Q8: What if the donor believes the balance shown on their statement is incorrect?**

A8: If the donor believes an error has been made on their account, please call the Development Division helpline to request further investigation. Please also call the Development Division helpline if the donor is unsure why their account shows an outstanding balance from the prior year. This sometimes occurs when paying via stock transfer as the value of the shares fluctuates daily. This can also occur if a payment is incorrectly applied or if a payment made by a third party (such as a donor advised fund) isn't applied to the donor's annual giving commitment.

**Q9: When will cumulative giving begin for new Keepers?**

A9: The answer is: it depends! Cumulative giving automatically starts with the donor's qualifying \$1,000 gift:

- A qualifying gift is a \$1,000 annual gift paid in full by December 31, or a \$1,000 grassroots gift paid in full within 12 months, or a major gift.
- If the Keepers gift is the donor's first \$1000 gift, cumulative giving will begin when the donor makes their first full year annual commitment.
- If the new Keeper signs up for a monthly installment payment plan starting in February or later, cumulative giving will begin the following year (and will include ALL previous Keepers payments), since the first year will be a partial year in terms of the annual commitment. Payment plans starting in January would allow the first year's commitment to be fully paid by December 31, and cumulative giving will begin that same year in January.

## Annual Giving – Frequently Asked Questions:

**Q10: If a new Keeper wants to set up an installment payment plan AND wants to start cumulative giving now, instead of waiting a year, can that happen?**

A10: Yes! If the new Keeper wants to set up an installment payment plan AND wants cumulative giving to start now (not delayed until next year), they can contact the Development Division helpline to request to pay the additional amount not covered during the first (partial year) by their monthly installment payment plan schedule. As long as the total annual giving commitment of \$1,000 is paid by December 31, cumulative giving will begin in the current year. The additional payments can be made through any payment method (check, credit card, stock, Israel bond, etc.).

**Q11: Tell me more about what it means to be in “Good Standing”? For example, if someone didn’t pay their annual gift in full last year, but is able to this year, are they considered in “Good Standing.?”**

A11: Good question! When the annual giver pays their full annual commitment or has not missed a payment per their installment payment schedule set up, they are in “Good Standing.” In this example, the donor was not in “Good Standing” last year but is in “Good Standing” this year, which is great news.

**Q12: What happens when someone is not in “Good Standing”?**

A12: When we see that someone is not paying on their regular payment schedule, their quarterly statement will include language asking them to resume paying their annual gift. You will be able to see this on your Intranet report and we encourage you to reach out to ask them to continue as well.

- After 12 months of missed payments, annual givers will be marked “Lapsed,” will no longer receive quarterly statements and will be placed in a file for further action.
- If the lapsed annual giver resumes their annual commitment at a later date, they will not be billed for balances from prior years.
- If there is no response to further outreach, the annual giver will be marked “Former” and the annual commitment will be closed.

**Q13: Is it possible for an annual giver to remain in “Good Standing” but not receive quarterly statements?**

A13: Yes, this is an exception that is possible upon request but is not encouraged:

- “Do Not Bill” status may be requested when a donor wants to continue their annual commitment but does not want to be billed by National.
- “Do Not Bill – Hold” status may be requested when a donor is paying off a major commitment or if the donor cannot renew at this time due to financial circumstances.

**DEVELOPMENT DIVISION**  
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**Direct link to  
online donation form:**

[www.hadassah.org/annualgiving](http://www.hadassah.org/annualgiving)