2020 Virtual Gathering Workshop Descriptions

Day 1

May 18, 11:30 – 11:50 am
Welcome and Opening Remarks

May 18, Noon – 1 pm
"Why Fundraising is the F Word to Your Board Members and How to Fix It"
Rachel Muir, Speaker, Trainer and Nonprofit Founder

Do you have board members who are "allergic" to fundraising? Few things are more critical to your nonprofit's health success and sustainability than an effective board of directors. Imagine your board members advocating your cause everywhere they go. Writing checks. Opening doors to influential prospects. Delighting your donors with a thank you call. Learn how to turn your board into a dream team as Rachel shares 1) the simple truth behind why boards struggle; 2) simple board contracts that ensure stellar fundraising results; 3) how to recruit and onboard your board for fundraising success; 4) how to turn board members into fundraising superheroes without making an ask; 5) tips for engaging, productive board meetings; and 6) how to use self-assessments to makeover your board.

May 18, 1:15 – 2:15 pm
"Leadership Succession: Planning with Intentionality"
Nanette Fridman, Principal, Fridman Strategies

Do you have a pipeline for new legacy team members? Do you have a succession plan for your legacy committee chair? Come learn the ideal succession process, discuss ways to retain and motivate current volunteers, share best practices in approaching prospective committee members, brainstorm to solve succession challenges and begin to formulate your succession plan.

May 18, 2:30 – 3:30 pm
"Storytelling: The Secret Sauce for Securing Legacy Commitments and Stewarding Donors"
Lynne Malzone Ierardi, JD, Author and Director of Gift Planning, University of Pennsylvania

Your organization has amazing stories to share – stories of profound impact, and generosity. Stories are at the core of *why* your organization exists. Scientific research confirms good storytelling is one of the most powerful ways to communicate, to engage stakeholders, and to influence behavior. It's *especially* important for effectively securing legacy commitments and reminding legacy donors they have made a good investment. But what makes a good impact story? With the right recipe, storytelling can be the *secret sauce* of *your* legacy initiative. In this interactive session based on Lynn's recently published book *Storytelling: The Secret Sauce of Fundraising Success*, you'll hear about what it takes to become a storytelling gourmet and refine your own storytelling recipes.

May 18, 3:45 pm – 4:45 pm
"The Donor Experience Unlocks the Future of Your Legacy Relationships"
Lynne Wester, The Donor Guru, Donor Relations Guru Group

How can you be the organization that provides donors the most meaningful donor experience? Put yourself in your legacy donor's shoes. They want to know they make a difference to your organization and they are valued.

Donor appreciation is not expensive but neglecting it can be. In this session you will learn how to put the donor first and consume yourself with the donor experience.

May 18, 5:00 – 6:00 pm

"Jewish Philanthropy 101: Jewish Perspectives on Asking, Giving and Leading"

Amy Schiffman, Co-Founder, Giving Tree Associates

What does it take to create a charitable Jewish community? How can you more closely explore personal values around giving when considering your approach to legacy development? This in-depth and interactive exploration of the Jewish concept of tzedakah will allow participants to develop a strategy around legacy giving (and asking) that focuses on intentional philanthropy. Take a deep dive on the Jewish values underpinning the concept of righteous giving and explore the means by which generations of donors' approach decisions around philanthropic priorities.

May 18, 6:15-7:15 pm

"2020 Graduation" and Gail Littman Leadership Award Presentations

Day 2

May 19, 11:30 – 11:50 am

Welcome and Opening Remarks

May 19, Noon – 1:00 pm

"The Art of an Unforgettable Thanks"

Rachel Muir, Speaker, Trainer and Nonprofit Founder

Many organizations embrace the philosophy of being donor-centered, but how that looks in practice is fundamentally critical to your bottom line. Join Rachel Mire for easy, affordable time-saving tips and stewardship templates to thank your legacy donors. Be inspired, delighted and thoroughly entertained with examples from the for-profit world and walk away with insights, tips and tools to look at the donor experience with a fresh perspective. This session is loaded with 1) real-life examples of top-notch thank you's; 2) when and how to automate without losing the personal touch; 3) digital tools that wow and save you time & money; 4) before and after thank you makeovers; 5) free templates you can put to work immediately; and 6) secrets you can steal from your favorite brands to build donor loyalty.

May 19, 1:15 pm – 2:15 pm

"Managing Your Legacy Committee and Community for Success"

Nanette Fridman, Principal, Fridman Strategies

What makes some legacy committees/ teams and communities successful and others less so? Often management is the answer. Come discuss the key ingredients for managing your legacy team/ committee or community. We will explore establishing relationships and expectations; formulating goals and work plans; time-management; agendas; effective communication before, during and after meetings; skillful facilitation; and addressing difficult situations and people. Bring your management secrets, challenges and questions with you!

May 19, 2:30 – 3:30 pm
"Formalizing Legacy Commitments: Getting Comfortable and Conversational with Ways to Give"
David Toll, JD, gift planning development, llc

Your donor has signed a Letter of Intent agreeing to legally formalize their legacy commitment within a certain timeframe – congratulations! It is now time to follow-up. What do you do, what do you say? In this session, David Toll, JD will provide guidance for those who find themselves in this situation. You'll learn what to say to initiate the follow-up the conversation. You'll also learn what steps a donor needs to take to include your organization in their will or trust, use life insurance to make a legacy gift, or name your organization as a beneficiary of their retirement assets. Additionally, participants will explore the options for donors who may be intimidated by potential complications or expenses related to changing estate plans, worried about adequately providing for their loved ones or simply fear outliving their income.

May 19, 3:45-4:45 pm
"The Power of Story"
Amy Schiffman, Co-founder, Giving Tree Associates

Storytelling has often been said to be at the heart of any successful conversation about giving. How do you harness the power of story to convey your legacy message? In this session you will learn how to identify the characteristics of a powerful story, create your own story, and elicit stories from legacy donors and prospects. You will also learn to use stories effectively in their donor cultivation, solicitation, and stewardship work.

May 19, 5:00 – 6:00 pm
"Homer Simpson Leaves a Legacy: A Guide to Behavioral Economics and Fundraising"
Alia McKee, Principal, SeaChange Strategies

Pop quiz: The following messages have what in common?

- Bill and Melinda Gates are challenging the world's wealthiest families to give a majority of their wealth to charity.
- Don't mess with Texas.
- A record turnout is expected!

The answer? They all use principles of behavioral economics to influence their audience's decisions. And you can too. Behavioral economics identifies social, cognitive and emotional factors that influence decisions. To put it simply, real people make decisions like Homer Simpson, not the rational-minded Spock. In this session you will 1) Learn what behavioral economics is and why it matters for legacy giving; 2) Explore persuasion principles you can use to win the hearts and minds of your audiences; 3) Leave with at least one idea you can apply to your legacy initiative.

May 19, 6:15 – 6:30 pm
Closing Ceremony

May 19, 6:30 – 7:00 pm
Legacy Coordinator Celebration – by invitation only