2020 Keynote and Workshop Descriptions by Workshop Session
As of 12.30.19 – subject to change

Sunday night Keynote:

Monday night Keynote: "From a Moment of Hate to a Movement of Hope"
Jeanne and Gideon Bernstein, Founders, #BlazeItForward

Jeanne and Gideon Bernstein started the #BlazeItForward movement in 2018 to encourage global community philanthropy and acts of kindness in an attempt to help heal the world after their Ivy League son, Blaze Nathan Bernstein, was murdered in California. Philanthropy wasn't a new concept to them at the time. Gideon was the Chairperson of the Jewish Community Foundation of Orange County and Jeanne, an attorney, was involved in contributing to the development of the Jewish community. They will share their story and how, despite going through tragedy, the concept of leaving a legacy and the impact of legacy giving has helped them to manage the grief and trauma of their loss and how it has allowed them to inspire others. Through their efforts, #BlazeItForward is now a movement with over 26,000 followers around the world doing intentional acts of kindness.

Workshop A1
The Legacy Conversation: "Ditch the Pitch"
Steve Yastrow, Author, President, Yastrow and Company

Donors have many priorities, limited time, and finite funds. What's the best way to engage their attention, connect with their emotions, and earn their contributions? Ditch the Pitch! In this session Steve Yastrow will describe how to create unique conversations that matter with donors. You'll learn techniques that will help you personalize donor conversations, creating the right conversation for each donor. By the end of the session you will 1) Understand why it is important to create unique conversations for each donor; 2) Learn the six Ditch the Pitch Habits that lead to conversations that matter with donors; 3) Have guidance on how to practice the Ditch the Pitch Habits; 4) Be confident in effectively improvising conversations with donors; and 5) Be on the road to improved legacy commitment performance. ***For those who have some experience having legacy conversations.***

Workshop A2
The Legacy Conversation: "How to Overcome Objections, Get the Appointment & Nail the Legacy Conversation"
Rachel Muir, Speaker, Trainer and Nonprofit Founder

Securing a face to face with donors gives you an 85% likelihood of receiving a gift. The legacy conversation itself is the easy part, it's getting the appointment that can sometimes be challenging. Join Rachel Muir for irresistible tools to get the appointment, stand out and know your message is getting through. Additionally, learn the "best of" discovery questions to make every second of your legacy conversation count. You'll walk away ready to quickly build rapport and spark meaningful legacy conversations with your donors. ***For those who are new to having legacy conversations or those who are experienced, but want to gain greater confidence***

Workshop A3

The Legacy Conversation: "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.

Workshop A4

The Legacy Conversation: "Formalizing Legacy Commitments: Getting Comfortable and Conversational with Ways to Give"

David Toll, JD, gift planning development, llc

(session description to be added shortly)

Workshop A5

Communications/Marketing: " 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.

Workshop A6

Communications/Marketing: "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.

Workshop A7
Communications/Marketing: Social Media Best Practices: Sharing Impact and Promoting Legacy Giving
Alli Thresher, Digital Content Lead, PJ Library

(session description to be added shortly)

Workshop A8
Stewardship: "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.

Workshop A9
Tools of the Trade: "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.

Workshop B1
The Legacy Conversation: "Ditch the Pitch: Communicating a Story that Drives Commitment"
Steve Yastrow, Author, President, Yastrow and Company

In this session Steve Yastrow will build on the six Ditch the Pitch principles that he has presented at previous Life & Legacy Gatherings and at local community Ditch the Pitch workshops adding a special focus on how to craft a story that will engage your donors. Attend this session if you are looking to enhance the unique conversations you are currently having with donors and be on the road to improved legacy commitment performance. ***For those who have some experience having legacy conversations.***

Workshop B2
The Legacy Conversation: "The Integrated Ask"
Nanette Fridman, Principal, Fridman Strategies

Having donor conversations can appear to be a complicated process, especially when you are asking the donors to invest in your organization in multiple ways. Join us to discuss how to have successful conversations with donors about annual, capital, endowment and legacy gifts. Learn what works and what does not. Discuss what it takes to get to yes! Bring your own complex cases or we will practice using scenarios provided in this interactive session.

Workshop B3
The Legacy Conversation: "The Secrets Behind Conducing Successful Legacy Conversations"
Julia Riseman, Mentor, Jcamp180, Consultant, Executive Coach and Fundraiser

Do you wish you knew the secret sauce behind conducting successful legacy conversations? It isn't complicated: Be sure that your donor is the center of the conversation. Come ready to ask open-ended and highly personal questions that are meaningful to your donor. Lean in and really listen, then reflect back what you learned. Savor and enjoy your time together. In this workshop we will review *and practice* the art of donor centric conversations, and you will gain some specific tips, hints, and take-a-way tools that you can employ in your next ask. ***For those who are new to having legacy conversations or those who are experienced, but want to gain greater confidence.***

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David Toll, JD, gift planning development, llc

(session description to be added shortly)

Workshop B5
Communications/Marketing: "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.

Workshop B6
Communications/Marketing: Social Media Best Practices: Sharing Impact and Promoting Legacy Giving
Alli Thresher, Digital Content Lead, PJ Library

(session description to be added shortly)

Workshop B7
Stewardship: "When They're Dead and Gone…."
Lynne Wester, The Donor Guru, Donor Relations Guru Group

…is too late to begin to steward your legacy donors! Ideally you should engage them before they've made their legacy commitment. Building an intentional bond with your legacy donors improves your chances of receiving more support now, as well as, the potential for increased legacy gifts. In this session you will learn how to develop a simple, yet strategic donor relations program that will build a lasting relationship now that will lead to greater support in the future.

Workshop B8
Stewardship: "Stewardship that Surprises and Delights: Remarkable and Effective Ways to Build Relationships"
Alia McKee, Principal, SeaChange Strategies

You want to surprise and delight your donors. But how can you do it creatively, effectively and affordably -- with limited time and resources to boot! This session will explore just that. Alia will 1) Share a case study from the National Audubon Society exploring their Insight Panel -- a hybrid cultivation and research initiative based on the consumer panels that have become a mainstay of the commercial sector notably JetBlue, Starbucks and other passion brands; 2) Highlight creative and impactful ideas you can pull off on a budget; and 3) Provide exercises to help you engage your staff, your broader team, and your board in ideating creative ways to surprise and delight your donors.

Workshop B9
Tools of the Trade: 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.

Workshop B10
Tools of the Trade: "Adaptive Leadership" *(by invitation only)*
Professor Hugh O'Doherty, Professor, Harvard's John F. Kennedy School of Government
Assisted by Tara Acker, Mentor, Jcamp 180

Tackling impossible challenges within your organization? Does it sometimes feel hopeless? Adaptive Leadership helps individuals and organizations exercise leadership in times of uncertainty - when there are no clear answers to problems because there isn't agreement on the nature of the problems to begin with. The adaptive theory proposes that there is no leadership position or role - *Leadership is an activity* that anyone can choose, with or without authority. In this adaptive leadership workshop, you will learn how to explore, identify and tackle systemic change, manage productive tensions, orchestrate conflict in the interest of learning, and build new alliances to move to more productive action for your organization.

Workshop C1
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Workshop C6

Stewardship: "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.

Workshop C7

Stewardship: "The Donor Experience Unlocks the Future of Your Legacy Relationships"

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Workshop C8

Tools of the Trade: "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!

Workshop C9

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Professor Hugh O'Doherty, Professor, Harvard's John F. Kennedy School of Government

Assisted by Tara Acker, Mentor, Jcamp 180

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