

Keynotes

Sunday Dinner: “Ethical Wills – A Resource to Enhance Our Legacy Initiative” – Rabbi Abigail Treu, Director, The Center for Jewish Living and The David H. Sonabend Center for Israel

Legacy conversations are about values: the values we hold dear and hope to pass on to future generations. How do we invite people to articulate those values? How can we make that a part of the work we are doing to secure legacy gifts? Ethical Wills, sometimes called spiritual or legacy letters, are resources Jews have used for centuries to articulate and pass on deeply held values and beliefs. Historically, they were letters written by parents to children; now, they often address a wider circle of friends and family and can come in a variety of creative formats. In this keynote, Rabbi Abigail Treu will share how ethical wills can be used to enhance our efforts to secure legacy gifts while introducing us to the Jewish Ethical Wills Project, which provides resources for communities to engage in creating ethical wills.

Monday Dinner: “The State of Jewish Philanthropy” – Andrés Spokoiny, President & CEO, Jewish Funders Network

The Jewish Funders Network works with Jewish funders, at the individual and collective levels, to improve the quality of their giving and maximize their impact as they make the change they want to see in the world. In this keynote, President & CEO Andrés Spokoiny will share with us his perspective on the current state of Jewish philanthropy.

Workshops

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! *(This session is also offered in the B and C Workshop time periods)*

Workshop A2 – The Legacy Conversation: “Asking Styles: Revolutionize Your Fundraising” – Brian Saber, Author, Founder, Asking Matters

If you’ve ever told yourself “I’m not comfortable asking for money,” you need to attend this session. Brian Saber’s breakthrough Asking Styles concept makes it possible for anyone to become more effective at having the legacy conversation. Your Asking Style is based on your personality and unique set of strengths when asking for gifts. Once you understand your strengths – and challenges – you’ll be more comfortable, confident, and effective in securing legacy commitments. *(This session is also offered in the C Workshop time period.)*

Workshop A3 – The Legacy Conversation: “The Five Types of Blended Gifts – The What, Why, and How of Closing Integrated Gifts” – Lani Starkey, JD, LLM, CPA, Founder, Fifty Rock Consulting

Blended or integrated gifts are trending in the fundraising world. While the practice of asking for such gifts has been occurring with varying degrees of consistency for years, there is more interest today than ever before. Blended gift advocates promise better gift results for your organization and greater satisfaction and impact for your donor. So, is it all too good to be true? Are there no downsides to integrated gifts? This session will look closely at the donor dynamics, risk factors, and “case” for a blended gift ask. Also, with the use of real-life case studies, we will identify the best donor profiles and segments for new integrated gift activity. Finally, we will focus on proposal planning and donor relationship status as key due diligence factors. If you are interested in 1) identifying the five types of blended/integrated gifts; 2) discovering how each type can be matched to a donor conversation strategy; 3) analyzing your organization for blended gift readiness and potential; and 4) determining the performance metrics that encourage integrated gifts, then this is the session for you.

Workshop A4 – Communication/Marketing: “Generational-Centric Engagement” – Nanette Fridman, Founder, Fridman Strategies

How should our approaches to legacy giving vary based on a donor’s generation? How do our messages, methods and communication channels need to be adjusted for the Greatest Generation, Boomers, Xers and Millennials? Come share lessons learned and challenges encountered in dealing with generational differences in this interactive session. *(This session is also offered in the C Workshop time period.)*

Workshop A5 – Communication/Marketing: “How to Make Your Legacy Donor Feel Like a Hero” – Karen Martin, Founder, Karen the Writer, Executive Editor, Giving Tomorrow

You want to show your donors the impact they are making and confirm for them that they made a good “investment.” But how? Statistics are boring, but you’re not sure how to jazz them up. Maybe you feel you’re short on good stories. If you’re short on time, short on staff, and you sure don’t have the budget to hire a full-blown marketing team, then this workshop is for you! Learn: 1) Why everyone’s talking about “donor-centric”; 2) If the donor is the hero, what does that make you?; 3) How to turn statistics into stories; 4) Simple writer tricks to make your stories more impactful; 5) The difference between an impact story and an asking story; 6) A winning formula for a powerful story – every time; 7) A simple acronym you’ll use over and over; and 8) Exercises to help you practice. *(This workshop is also offered in the C Workshop time period.)*

Workshop A6 – Communication/Marketing: “The Sound of Leadership” – Dr. Laura Sicola, Leadership Communication Expert, Author, Founder, Vocal Impact Production

When you speak, the way you communicate your vision will directly affect your ability to connect with your listener and get the results you want. Bring your smartphone and your earbuds/headphones and join Dr. Laura Sicola for this interactive workshop to discover how to get out of your own way and get the results you want by mastering the Three C’s: command the room, connect with the audience, and close the deal.

Workshop A7 – Communication/Marketing: “The THREE I’s Missing from your Message” – Jeffrey Stein, President and Co-Founder, Planned Giving Marketing LLC

Do your donors know that legacy giving is IMPORTANT to your mission? Is your legacy society as INCLUSIVE as it can be? Do you INVITE donors into a conversation or are you just offering them more information? Jeffrey Stein will reveal the Three I’s critical to your legacy marketing messages, and why leaving them out is keeping some of your best prospects from stepping forward.

Workshop A8 – Team Motivation: “Moan-less Team Management” – Tracy Salkowitz, MSW, Consultant

How often does the thought of your legacy team make you moan? Do you ever leave your meetings wanting to bang your head against the wall? In this session, learn how to set up and energize your legacy team, clarify roles, and ensure effective coordination. From motivating volunteers to achieving committee goals, all will be explored. Bring your worst nightmares – we’ll have solutions!

Workshop A9 – Tools of the Trade: “Ethical Wills” – Rabbi Abigail Treu, Director, The Center for Jewish Living and The David H. Sonabend Center for Israel and Elizabeth Leiman Kraiem, Senior Consultant to the Jewish Ethical Wills Project

There are many reasons to make an ethical will: to reflect on how we have lived and how we wish to live; to give and to ask for love; to pass on what we don’t want forgotten; and to leave behind something personal and distinctive for family and friends. This workshop will expose you to the Jewish Ethical Wills Project and get you started on creating your own ethical will and thinking about how to use ethical wills as part of your legacy fundraising, stewardship, and community-building tool kit. *(This session is also offered in the B and C Workshop time periods.)*

Workshop B1 – The Legacy Conversation: “Ditch the Pitch” – Steve Yastrow, Author, President, Yastrow and Company

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time periods)

Workshop B2 – Communication/Marketing: “Introduction to Social Media” – Alli Thresher, Digital Content Lead, PJ Library

Do you feel like phones are a distraction? Are you stymied by social media? Unsure of how or why your organization should be using it? In this session, we’ll dive into the business case for maintaining an active presence on social media and do a deep dive on using Facebook for engagement and lead generation.

Workshop B3: - Communication/Marketing: “Writing Effective Donor Letters” – Karen Martin, Founder, Karen the Writer, Executive Editor, Giving Tomorrow

Does writer’s block get in your way when it comes to communicating with prospective and committed legacy donors? Are you short on time? No money to hire a professional copywriter? After this workshop you’ll be totally prepared to write your donor letters – faster and better. You’ll walk away with an outline for three letters you’ll be able to start using immediately: 1) A letter to pave the way for a meeting; 2) A letter to move legacy donors from commitment to formalization; and 3) An A-plus thank-you letter to make your donor feel like a superstar.

Workshop B4 – Communication/Marketing: “The Art of Storytelling” – Dr. Laura Sicola, Leadership Communication Expert, Author, Founder, Vocal Impact Production

Let’s face it: Statistics might get through to the brain, but stories get through to the heart. Join Dr. Laura Sicola for this interactive workshop to learn three key steps to powerful storytelling as a tool for inspiring people to act. Be ready to bring your stories to life!

Workshop B5 – Communication/Marketing: “The Three I’s Missing from your Message” – Jeffrey Stein, President, Planned Giving Marketing

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Workshop B6 – Team Motivation: “Using the Asking Styles to Build a Strong Team” – Brian Saber, Author Founder, Asking Matters

Your Asking Style is based on your personality and unique set of strengths. Asking Styles not only help you put your best foot forward when having a legacy conversation, but can also help you understand the dynamics of your LIFE & LEGACY team. Join Brian Saber to learn how to work with team members of various Styles. If you’re the chair or team lead, learn how to best manage your team for the long run given everyone’s individual Style. Also learn the benefits of partnering to cultivate and have legacy conversations, and learn

how to use your Asking Style as a roadmap to understand these partnerships.

Workshop B7– Tools of the Trade: “How to Successfully Partner with Advisors and Close More Gifts” – Lani Starkey, JD, LLM, CPA, Founder, Fifty Rock Consulting

In many cases, a donor’s professional advisors hold the keys to a major, planned, or transformational gift. Therefore, sometimes to close such a gift we must obtain approval, buy-in, and/or consent from the advisor(s). This presentation is designed to equip you with the ability to favorably interact and motivate professional advisors. Specifically, we will discuss common advisor objections to gift proposals and examples of what to say to address and overcome them. We will also evaluate advisor relationship strategies, marketing methods, and networking opportunities. Finally, we will discuss innovative and effective ways to identify and engage philanthropic clients. If you are interested in leveraging advisor relationships for maximum philanthropic impact, then this is the session for you. *(This session is specifically for legacy coordinators and federation and Jewish community foundation professionals)*

Workshop B8 – Tools of the Trade: “Turning Your Board into Legacy Ambassadors” – Nanette Fridman, Founder, Fridman Strategies

Are your board members ambassadors for your legacy program? Are they helping to promote your program and identify, educate, and steward legacy donors? Come learn effective ways that board members can be strong ambassadors for legacy gifts – even if they don’t want to ask for money!

Workshop B9 – Tools of the Trade: “Ethical Wills” – Rabbi Abigail Treu, Director, The Center for Jewish Living and The David H. Sonabend Center for Israel and Elizabeth Leiman Kraiem, Senior Consultant to the Jewish Ethical Wills Project at the Marlene Meyerson

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Workshop C1 – The Legacy Conversation: “Ditch the Pitch” – Steve Yastrow, Author, President, Yastrow and Company

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Workshop C3 – The Legacy Conversation: “The 8 Ways to Ask: Expanding the Art and Science of The Donor Conversation” – Lani Starkey, JD, LLM, CPA, Founder, Fifty Rock Consulting

To be a happy and successful legacy team member, hit required metrics, and produce more results with less resources, many of us could benefit from being more innovative and creative with our donor conversation strategies. With this goal in mind, Lani Starkey has observed and developed eight proven and repeatable ways to ask for major, planned, and transformational gifts. Some of these you may already do now, but just not be aware of it. Others you might never have even considered. These eight ways provide an arsenal of options to do your job better, faster, and with more measurable results. Accordingly, this presentation will describe the eight ways and real-life case studies that illustrate each method. In addition, this session will share unique insights into relationship building, performance management, and fundraising profile types.

Workshop C4 – The Legacy Conversation: “Formalizing Your Legacy Gift” – Tracy Salkowitz, MSW, Consultant

Some people are intimidated by the thought of going back to donors to move them from a letter of intent to a formalized legacy commitment. Why is that? How do we get over our own insecurity and dive right in? This session will provide a step-by-step action plan to get you over your fear, in addition to tips and techniques to overcoming hurdles and strategies to help your donors moving forward. Did you know that donors increase their gift during the formalization stage, and some add to the number of organizations originally committed to? If you are stalling, you are causing your favorite organizations to lose support! Join us and we’ll secure our community’s future together.

Workshop C5 – Communication/Marketing: “Generational-Centric Engagement” – Nanette Fridman, Founder, Fridman Strategies

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in this interactive session. *(This session is also offered in the A Workshop time period.)*

Workshop C6 – Communication/Marketing: “Social Media Town Hall” – Alli Thresher, Digital Content Lead, PJ Library

Bring your burning questions about Facebook ads, Twitter scheduling, Instagram, Snapchat, etc. This is an informal come and go session where any and all questions are encouraged.

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