

# 2021 Workshop Descriptions

As of 3.30.2021 – *Subject to change*

All times Eastern Time

**Tuesday, May 25, 2021**

**11:30 AM – 12:30 PM**

## **2021 LIFE & LEGACY®/Create a Jewish Legacy Leadership Gathering Opening Ceremony**

*Winnie Sandler Grinspoon*, President, HGF, *Harold Grinspoon*, Founder, HGF, *Dr. Bruce Powell*, President, Jewish School Management, *Arlene D. Schiff*, National Director, LIFE & LEGACY®, HGF, *Dirk Bird*, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, JFNA, *David Brown*, National Campaign Chair, JFNA, *Tamra L. Dollin*, LIFE & LEGACY Community Consultant, HGF, *Jamie Light*, Director of Conferences and Events, HGF

Join us as we kickoff the 2021 LIFE & LEGACY/Create a Jewish Legacy Leadership Gathering. We will celebrate our success to date, hear from the HGF President, Winnie Sandler Grinspoon, and the HGF Founder, Harold Grinspoon, set an intention for our time together over the next three days, and learn why endowment building is a moral imperative.

**1:30 – 2:30 PM**

## **Focus Groups by organizational type**

Focus groups provide an opportunity for attendees to get together with peers from similar organizations to celebrate successes, share best practices, and brainstorm around challenges. Don't miss this opportunity to network with colleagues in small group discussions! Groups include: **Camps, Chabads, Conservative Congregations (with membership less than 250), Conservative Congregations (with membership of 250 or more), Day School (Preschool – High School), Jewish Community Foundation Directors, Jewish Education Agencies, Jewish Federation Senior Staff (Execs, Development Directors), LIFE & LEGACY Community Legacy Coordinators, Orthodox Congregations, Reform Congregations (with membership less than 250), and Reform Congregations (with membership of 250 or more)**. Register for the focus group that most closely aligns with your organizational type.

**2:30 – 3:30 PM**

## **Marketing & Stewardship Marketplace**

*Dena Morris Kaufman*, LIFE & LEGACY Community Consultant, HGF

Sharing ideas is a hallmark of LIFE & LEGACY communities. The Marketing & Stewardship Marketplace is an opportunity to take advantage of the creativity of others and be inspired to try something new. Stop by this virtual presentation featuring the best in marketing and stewardship ideas. This virtual presentation is also offered on May 26 at 12:30 pm, and May 27 at 4:30 pm.

**3:30 – 4:30 PM**

### **Focus Groups by organizational type**

Focus groups provide an opportunity for attendees to get together with peers from similar organizations to celebrate successes, share best practices, and brainstorm around challenges. Don't miss this opportunity to network with colleagues in small group discussions! Groups include: **Congregations (other than Reform, Conservative, Orthodox & Chabad), Conservative Congregations (with membership less than 250), Conservative Congregations (with membership of 250 or more), Hillel's, JCCs, Holocaust Education, Historical Societies/Museums, Jewish Family Service type organizations, Jewish Federation Staff (Non-Senior Staff), Other Social Service Organizations, Reform Congregations (with membership less than 250), Reform Congregations (with membership of 250 or more), and Senior Living Facilities.** Register for the focus group that most closely aligns with your organizational type.

**5:30 – 6:30 PM**

### **Baby Boomers and Planned Giving: A Very Special Generation or Just Typical Old People**

*Dr. Russell James, Professor and CH Foundation Chair of Personal Financial Planning, Texas Tech University*

In this irreverent and entertaining session, Dr. James reviews nationally representative data on Baby Boomers and their legacy giving. Beyond simple statistics, this workshop demonstrates how these demographic realities, and age-related psychological factors, should change how and when you communicate legacy giving information to Boomers. If you are seeking legacy-specific information on this target audience, based on hard data that goes beyond "just so" stories with obligatory pictures of Woodstock, Vietnam, and Neil Armstrong, then this is the workshop for you!

**7:30 – 8:30 PM**

### **Legacy Donor Appreciation Event**

*Winnie Sandler Grinspoon, President, HGF, Harold Grinspoon, Founder, HGF, Arlene D. Schiff, National Director, LIFE & LEGACY®, HGF, Jonah Kaplan, Political and Investigative Reporter, WTVD*

Join us for a wonderful evening of gratitude and storytelling, in appreciation of the more than 18,000 individual donors who have made a legacy commitment in the first eight years of LIFE & LEGACY®.

## Wednesday, May 26, 2021

**11:30 AM – 12:30 PM**

### **Why Now is the Perfect Time to Have Conversations About Values, Giving and Your Family's Legacy**

*Nanette Fridman*, Founder & President, Fridman Strategies, Inc.

This workshop will explore how we pass our values and philanthropic spirit from generation to generation, share exercises for exploration about values and causes, and ideas to catalyze conversations with family members and heirs. Leave with next steps that are perfect for this moment in time.

**12:30 – 1:30 PM**

### **Marketing & Stewardship Marketplace**

*Dena Morris Kaufman*, LIFE & LEGACY Community Consultant, HGF

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**12:45 – 1:15 PM**

### **Drop-in Session: Your Legacy Questions Answered**

*Dirk Bird*, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, JFNA, *Tamra L. Dollin*, LIFE & LEGACY Community Consultant, HGF

Have a pressing legacy question you want answered? Drop-in to ask it here!

**1:30 – 2:30 PM**

### **LIFE & LEGACY® Each One Reach One Campaign – Creating a Movement**

*Lynne Wester*, The Donor Guru, Donor Relations Guru, LLC

This workshop will walk you through LIFE & LEGACY's new campaign to help you increase the number of legacy donors to your organization and community. In this interactive session, you will learn how to build out your *Each One Reach One* initiative. Hear about the tools LIFE & LEGACY has created for you to use in your efforts, and how to recruit donors and volunteers to move your legacy initiative forward.

**2:30 – 3:30 PM**

### **Gender Matters**

*Judy Altenberg*, Chair, LOJE25 Initiative, JNFA, *Kathleen Loehr*, Founder, Gender Matters in Philanthropy

Please join us as we explore the unique role that female leaders and philanthropists play throughout the non-profit sector, the evolution of their roles in a post-COVID world, and strategies for organizations to better harness and leverage the growing power of women throughout philanthropy.

**2:45 – 3:15 PM**

**Drop-in Session: Your Legacy Questions Answered – Focused on Teams**

*Dena Morris Kaufman & Tamra L. Dollin*, LIFE & LEGACY Community Consultants, HGF

Have a pressing question you want answered about legacy team engagement? Drop-in to ask it here!

**3:30 – 4:30 PM**

**Using Presence and Communication to Secure Legacy Commitments**

*Rae Ringel*, Certified Executive Coach and founding President of The Ringel Group

Presence and communication during both in-person and virtual conversations, are fundamental to achieving excellence because language is generative – it creates new dynamics in every relationship. In this workshop, we will focus on critical in-person and virtual communication skills that improve your ability to achieve results. From asking powerful questions, to deep intensive listening, to asking others to join you in making a legacy commitment, and breaking unproductive habits, you will learn critical skills that will lead to more productive legacy conversations.

**4:45 – 5:15 PM**

**Drop-in Session: Your Legacy Questions Answered**

*Gail J. Gordon*, Senior Director, Planned Giving & Endowments, JFNA, *Dena Morris Kaufman*, LIFE & LEGACY Community Consultant, HGF

Have a pressing legacy question you want answered? Drop-in to ask it here!

**5:30 – 6:30 PM**

**Change the Story, Change the World**

*Andy Goodman*, Co-Founder and Director, The Goodman Group

Since we first began talking to each other, telling stories has been a powerful way to capture attention, engage an audience, and motivate to action. As we learn more about how our minds work, we are also discovering that stories are intrinsic to decision-making and shaping our view of the world. In his workshop, Andy Goodman will explain why storytelling remains the single most powerful communication tool you possess. He will offer specific ways your organization can use stories to advance your legacy initiative.

**7:30 – 8:30 PM**

**Keynote: How COVID is Transforming Philanthropy**

*Andrés Spokoiny*, President & CEO, Jewish Funders Network

Andrés Spokoiny will discuss how COVID is upending many aspects of our life: how we connect with others, how we study, how we pray, and how we give. Funders of all walks of life are giving differently, more thoughtfully, and boldly. Philanthropy today looks both similar and different than a year ago. What has changed? Will we go back to “normal”? Join us for this insightful keynote that will reflect on how the changes in philanthropy will that COVID ushered in, will impact the work of Jewish communities.

**Thursday, May 27, 2021**

**11:30 AM – 12:30 PM**

**Making the Ask!**

*Nanette Fridman*, Founder & President, Fridman Strategies, Inc.

In this interactive workshop, we will define and explore motivations for legacy giving. Together, we will outline the steps for making the ask and discuss the key elements of a legacy conversation. Whether you are new to having legacy conversations, or have been having them for a while, join us! This is an opportunity to both learn new and enhance existing legacy conversation skills.

**12:45 – 1:15 PM**

**Drop-in Session: Your Legacy Questions Answered**

*Dirk Bird*, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, JFNA, *Tamra L. Dollin*, LIFE & LEGACY Community Consultant, HGF

Have a pressing legacy question you want answered? Drop-in to ask it here!

**1:30 – 2:30 PM**

**Continuing Your LIFE & LEGACY® Each One Reach One Journey – Building and Advancing the Movement**

*Lynne Wester*, The Donor Guru, Donor Relations Guru, LLC

In this workshop, we will discuss advanced strategies and tactics to take your legacy initiative to the next level. We will combine storytelling and the WHY behind our efforts to help you increase your organization/community's legacy donors through our new *Each One Reach One* campaign. We will also explore the psychology behind why it is not the leader that takes a movement to the next level, it is the first brave follower.

**2:45 – 3:15 PM**

**Drop-in Session: Your Legacy Questions Answered**

*Gail J. Gordon*, Senior Director, Planned Giving & Endowments, JFNA, *Dena Morris Kaufman*, LIFE & LEGACY Community Consultant, HGF

Have a pressing legacy question you want answered? Drop-in to ask it here!

**3:30 – 4:30 PM**

**We Tell Stories in Order to Live, We Tell Stories in Order to Give: How to Create a Powerful Narrative Around Your Gift So It Makes a Bigger Impact and Inspires More to Do the Same**

*Boris Fishman*, Novelist, Memoirist, Journalist, Professor of Creative Writing

No matter how much changes in the world, we remain people who make sense of the world through stories. But imagine if the opening book of the Torah told us, in sum, that "God gave instructions to Eve, but she disobeyed," instead of the concrete, consequential story -- garden, serpent, apple, the fate of full knowledge -- it tells, filled with competing motivations, suspense, and the highest stakes in existence. Such a document might have fewer readers today. This workshop will guide you through the principles of what makes compelling, vivid narrative, and how we might use the same eternal tools to tell public stories about our giving that lead to greater impact for our legacies and in our communities.

**4:30 – 5:30 PM**

**Marketing & Stewardship Marketplace**

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**5:30 – 6:30 PM**

**Formalizing Legacy Commitments – A Panel Discussion**

*Edward Beckwith*, Partner, BakerHosteler, *Dirk Bird*, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, JFNA, *Ellen Frank*, Director of Donor Relations, PJ Library, HGF, *Arlene D. Schiff*, National Director, LIFE & LEGACY®, HGF, *Fredrick Weber*, Senior Wealth Advisor, National Estate Settlement Services Practice, Northern Trust

Moving a donor from a letter of intent to legally putting their legacy commitment in place is necessary to ensure legacy gifts come to fruition. Join us for this panel discussion which will review the process including how to have the conversation, ways to give, the importance of stewardship, and the process once a donor passes.

**7:30 – 8:30 PM**

**2021 Commencement, Gail Littman Award Presentation & Closing Ceremony**

*Arlene D. Schiff*, National Director, LIFE & LEGACY, *Dena Morris Kaufman & Tamra L. Dollin*, LIFE & LEGACY Community Consultants, HGF, *Dirk Bird*, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, JFNA

Please join us as we celebrate the newest communities to complete the four-year LIFE & LEGACY® curriculum; Central MA, Durham Chapel Hill, Lehigh Valley, Louisville, Minneapolis, Nashville, Palm Beach, Sarasota-Manatee, Tidewater and Tampa, Orlando, Pinellas (TOP)! We will also announce and honor the 2021 Gail Littman Award winner, and bring to conclusion three days of networking, sharing successes, brainstorming around challenges, and preparing to increase the number of legacy donors by December 31, 2021.