

PRESENTER BIO'S

JUDY ALTENBERG, Chair, LOJE25 Initiative, The Jewish Federations of North America (JNFA)

Judy Altenberg joined the Rose Community Foundation staff in June 2019 as Director of Gift Planning and Advisor Relations. Judy has been involved with the Foundation since 2007 as a Foundation trustee and a member of the Education Committee and chair of the Jewish Life Committee. She is a past chair and now lifetime board member of the Board of National Women's Philanthropy of the Jewish Federations of North America (JFNA), as well as a trustee of JFNA, where she also serves on the Executive Committee and Chairs the Nominating Committee. She is a past chair of the Jewish Women's Philanthropy Center of JEWISHColorado, where she has chaired several fundraising divisions. Judy is also an alumna of the United Jewish Communities' National Young Leadership Cabinet where she held several positions. She is a 2010 graduate of the Wexner Heritage Program, an intensive two-year program of Jewish leadership and learning. She is trained as a lawyer and has a nonprofit consulting practice but spent the better part of her career volunteering in the community.

EDWARD BECKWITH, Partner, BakerHosteler

Ed Beckwith is nationally recognized for his skill and commitment as counsel to high-net-worth families and charities across the country. He serves as the National Leader of BakerHostetler's tax-exempt organizations and charitable giving practices. Ed's experience includes the legal and administrative specialties required to establish and successfully guide the operations of charitable and educational organizations, healthcare institutions and trade associations. Ed has lectured throughout the United States and has written extensively including articles and speeches for the American Law Institute and the American College of Trust and Estate Counsel. He frequently chairs continuing education programs for private wealth professionals and has been an adjunct tax professor at Georgetown University Law Center for 36 years, where he currently teaches and coordinates a graduate-level certificate program in Advanced Estate and Charitable Planning. Ed can be reached at ebeckwith@bakerlaw.com.

DIRK BIRD, Vice President, Planned Giving & Endowments, Managing Director, Total FRD, The Jewish Federations of North America (JFNA)

As the former Chief Development Officer of JEWISHcolorado and the former Executive Director of the Jewish Community Foundation in Denver, Dirk Bird has extensive experience in development planning, lay leadership engagement, major gift development, family philanthropy, gift planning, next generation engagement, professional development, and overall donor stewardship. Dirk received his B.A. in education from the University of Northern Colorado, and his M.A. in Sports Management from the University of the Pacific. In addition, Dirk currently serves on the Board of Directors for the Denver School of the Arts Foundation and is a certified 21/64 trainer with a specific focus in multigenerational family philanthropy. Dirk can be reached at dirk.bird@jewishfederations.org.

DAVID BROWN, National Campaign Chair, The Jewish Federations of North America (JFNA)

David Brown is an active Board member of the Jewish United Fund of Metropolitan Chicago (JUF) and is a past Chair of its Board of Directors. He has held multiple positions within JFNA and JUF. David also serves as a Board member for BBYO, is active in AIPAC, and is a regular visitor to Israel. He is Chairman of the Chicago-based law firm, Much Shelist, P.C., where he is actively involved in strategic planning and leadership development for the firm. David is an experienced business and transactional attorney who serves as a valued business advisor to his clients.

TAMRA L. DOLLIN, MSW, CPCC, LIFE & LEGACY® Community Consultant, Harold Grinspoon Foundation (HGF)

Prior to joining HGF, Tamra L. Dollin directed the establishment of Ramah in the Rockies, focusing on project management, fundraising, and board development. Tamra holds master's degrees from Columbia University and the Jewish Theological Seminary, and an undergraduate degree from UC Berkeley. She is an alumna of the Wexner Graduate Fellowship and is a certified professional Co-Active coach. Tamra can be reached at tammy@hgf.org.

BORIS FISHMAN, Novelist, Memoirist, Journalist, Professor of Creative Writing

Boris Fishman is the author of the novels *A Replacement Life* (which won the VCU Cabell First Novelist Award and the American Library Association's Sophie Brody Medal), *Don't Let My Baby Do Rodeo*, both *New York Times* Notable Books of the Year, and *Savage Feast*, a family memoir told through recipes, all from HarperCollins. His journalism has appeared in *The New Yorker*, *The New York Times Magazine*, *The Guardian*, *The Wall Street Journal*, *The Washington Post*, *Saveur*, *Vogue*, *Travel + Leisure*, and many other publications. He lives with his wife and daughter in Missoula, Montana, where he teaches in the Creative Writing MFA Program at the University of Montana. Please visit www.borishfishman.com for more information.

ELLEN FRANK, Director of Donor Relations, PJ Library, Harold Grinspoon Foundation (HGF)

With nearly two decades of advancement, fundraising, and nonprofit management experience, Ellen Frank joined HGF in February 2021. She began her career at Republic National Bank of New York, has served as the Director of Donor Relations at the Williston Northampton School in Easthampton, Massachusetts, and was most recently Executive Director of Lander-Grinspoon Academy in Northampton, Massachusetts. Ellen can be reached at efrank@hgf.org.

NANETTE FRIDMAN, Founder & President, Fridman Strategies, Inc.

Nanette Fridman is a catalyst for values-driven organizations and leaders. She founded Fridman Strategies, Inc., in 2006 to assist organizations with the strategies, training and coaching to advance their missions and maximize their impact. Today, her work focuses on governance, fundraising, strategic planning, leadership, and team development. Nanette's clients range from small start-ups to large international organizations. Nanette is the author of *On Board: What Every Board Member Must Know about Nonprofits and Board Service*. A regular blogger, her articles can be seen on eJewishPhilanthropy, massnonprofit news and other publications. Nanette earned her Juris Doctorate, cum laude, and M.A. in public policy from Georgetown University. She received her B.A., summa cum laude, in Political Science from Tufts University. Nanette is honored to be a Harry S. Truman Scholar. She can be contacted at fridmanstrategies@gmail.com www.fridmanstrategies.com.

ANDY GOODMAN, Co-Founder and Director, The Goodman Center

The Goodman Center teaches communications and marketing professionals how to reach more people with more impact. Along with *Storytelling as Best Practice*, Andy Goodman is the author of *Why Bad Ads Happen to Good Causes* and *Why Bad Presentations, Happen to Good Causes*. He also publishes a monthly journal, *Free-range Thinking*, to share best practices in the field of public interest communications. Andy is internationally known for his speeches and workshops on storytelling and has led over 500 trainings for major non-profit and for-profit organizations across the U.S. He has designed communications curriculum for the College for Social Innovation in Boston. Andy serves on the advisory board of the Institute for Human Caring. Andy can be reached at www.thegoodmancenter.com or andy@thegoodmancenter.com.

GAIL J. GORDON, Senior Director, Planned Giving & Endowments, The Jewish Federations of North America (JFNA)

Gail J. Gordon is a trusted advisor to planned giving professionals throughout the Jewish federation system. In addition to identifying best practices and educating the professionals about them, she helps to structure planned gifts that allow donors to realize their philanthropic vision, and federations and Jewish community foundations to sustain the vibrancy of the Jewish community at home and abroad. Gail previously served as Endowment Director of the Jewish Federation of Greater Seattle. Before joining the Seattle Federation, Gail was a securities lawyer. Gail holds a JD from the University of Washington School of Law and a B.A. from the University of Pennsylvania. She is also a graduate of the Year Program of the Pardes Institute for Jewish Studies in Jerusalem. Gail can be contacted at gail.gordon@jewishfederations.org.

HAROLD GRINSPOON, Founder, Harold Grinspoon Foundation (HGF)

Harold Grinspoon, the founder of the Harold Grinspoon Foundation (along with his wife Diane Troderman), is a real estate entrepreneur and philanthropist. He is also the visionary behind HGF's key programs: PJ Library, JCamp 180, LIFE & LEGACY®, and Voices and Visions. Harold and Diane have also established the Harold Grinspoon Charitable Foundation, which supports educational initiatives for inner city youth in Springfield, MA, recognizes Western MA teachers for professional excellence, encourages entrepreneurship, supports Western MA farmers, and supports educational and health projects in Cambodia. In June 2015, Harold and Diane signed Warren Buffet's Giving Pledge, committing to donate more than half their wealth to charitable causes.

WINNIE SANDLER GRINSPOON, President, Harold Grinspoon Foundation (HGF)

Winnie Sandler Grinspoon assumed the role of President of the Harold Grinspoon Foundation in June 2014. Winnie added this role to her long tenure as a trustee of the Harold Grinspoon Foundation. Prior to her work in philanthropy, Winnie practiced law, first in New York (Stroock & Stroock & Lavan) and Boston (Kirkpatrick & Lockhart, now K & L Gates), and more recently in her own law practice. Winnie holds a B.S. from Cornell University and a JD from Fordham University.

RUSSELL JAMES, J.D., Ph.D., CFP®, Professor and CH Foundation Chair of Personal Financial Planning, Texas Tech University

Russell James is a professor and CH Foundation Chair of Personal Financial Planning and Director of Graduate Studies in Charitable Financial Planning at Texas Tech University. After more than a quarter century spent as a planned giving fundraiser, an estate planning attorney in private practice, a major gifts fundraiser/college president and now as a university professor researching charitable giving and fundraising, his focus is to make and share words, pictures, and discoveries that help others to encourage generosity. Dr. James has over 150 publications in academic journals, conference proceedings, and books. He has been quoted on charitable and financial issues in a variety of news sources including *The New York Times*, *The Wall Street Journal*, *CNN*, *MSNBC*, *CNBC*, *ABC News*, *U.S. News & World Report*, *USA Today*, *the Associated Press*, *Bloomberg News*, and the *Chronicle of Philanthropy*. His financial neuroimaging research was profiled in *The Wall Street Journal's* Smart Money Magazine. He can be reached at russell.james@ttu.edu.

JONAH KAPLAN, Political and Investigative Reporter, WTVD

Jonah Kaplan is an award-winning Political and Investigative Reporter at WTVD, the ABC-owned station in Raleigh-Durham, NC. He plays key roles in election coverage and has conducted exclusive interviews with presidents, vice presidents, mayors and governors. Jonah began his career in sports with positions at ESPN and YES Network, but later transitioned into full-time work in news. His work has appeared on ABC, NBC, and CBS News, as well as CNN and MSNBC. Jonah is a four-time Emmy nominee, and in 2018 was named TV News Reporter of the Year by the Radio-Television-Digital News Association of the Carolinas. In 2013, the Religion Communicators Council recognized Jonah with the Wilbur Award for his reporting and producing a five-part series called "Journey to Jerusalem," an award he shared with the late 60 Minutes correspondent Bob Simon. Jonah's professional journey also includes stops at WTMJ-TV in Milwaukee, WI, KSPR-TV in Springfield, MO, KAUZ-TV in Wichita Falls, TX, Gray Television's Washington D.C. Bureau, and the NHL's Boston Bruins.

DENA MORRIS KAUFMAN, CFRE, CAP®, LIFE & LEGACY® Community Consultant, Harold Grinspoon Foundation

Prior to joining HGF, Dena Kaufman was the director of philanthropy for Sojourner Center, the nation's largest domestic violence shelter. Her professional career has also included nine years at the Jewish Federation of Greater Phoenix in various campaign roles and development director at URJ Camp Newman. Dena has a degree in business, public, and private administration from the University of California, Riverside, is a Certified Fundraising Executive and a Chartered Advisor in Philanthropy. Dena can be reached at dena@hgf.org.

JAMIE LIGHT, Director of Conferences and Events, Harold Grinspoon Foundation (HGF)

Jamie Light is the Director of Conferences and Events for the Harold Grinspoon Foundation. Previously, Jamie worked in higher education and as a consultant specializing in strategic storytelling and leadership development. Jamie has a bachelor's degree in psychology and business from Washington University in St. Louis and a master's degree in college student personnel from Bowling Green State University. Jamie has been an active board member for The Temple-Tifereth Israel and a long-time volunteer for Alpha Epsilon Phi Sorority.

KATHLEEN LOEHR, Founder, Gender Matters In Philanthropy

Kathleen Loehr's partnership with university and nonprofit leaders as a trusted advisor is grounded in thirty-five years of experience. Through individual and facilitated group work, she helps institutions blend their aspirations to serve the common good with their commitment to create effective and sustained impact. Trained in the change management model of Appreciative Inquiry, Kathleen combines nonprofit and fundraising expertise, coaching and strategy to help leaders and groups navigate change. Kathleen is a thought leader regarding the role of women in modern philanthropy. Women are more frequently in the philanthropic driver seat, given the increased money being earned and inherited, and their influence on household giving. Kathleen translates the research on how women give into practical actions fundraisers can take in her book, *Gender Matters: A Guide to Growing Women's Philanthropy*, (2018). Kathleen holds a B.A. in Government from Cornell University's College of Arts and Sciences. She sits on the board of the Center for Disaster Philanthropy and is the chair of the Advisory Council for the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy.

DR. BRUCE POWELL, President, Jewish School Management

For the past 50 years, Dr. Bruce Powell has dedicated his professional life to Jewish education. He has helped to found and lead Yeshiva University of Los Angeles High School, Milken Community High School, and de Toledo High School, all in Los Angeles. He has consulted on the founding of 23 other Jewish high schools throughout North America. In addition, he has provided consulting services to over 60 Jewish day schools through his work as President of Jewish School Management (JSM). For the past two years, Bruce has been the Director of the Institute for Day School Excellence and Sustainability (IDEAS) servicing ten Jewish day schools across America. He is the author of the June 2020 eJP titled *Endowment: A Moral Imperative*. He received his B.A. in English from UCLA in 1970, his doctorate from the University of Southern California in 1979, and an honorary doctorate from the American Jewish University in 2007.

RAE RINGEL, Certified Executive Coach and founding President, The Ringel Group

Rae Ringel is in high demand as an innovator in the areas of coaching, facilitation, and training across sectors. She enables a growing list of executives in some of the most successful Fortune 500 companies, nonprofits, and government agencies to become more effective managers and stronger communicators with a formidable leadership presence. Rae offers deep experience in the areas of fundraising and board development. Prior to starting The Ringel Group, Rae was the Director of Professional and Volunteer Development at United Jewish Communities, now The Jewish Federations of North America (JFNA). She is a faculty member at the Georgetown University Institute for Transformational Leadership and founding director of their certificate program in the Art of Facilitation and Design. She is also adjunct faculty at the University of Maryland Robert H. Smith School of Business. Rae is a Phi Beta Kappa Graduate of the University of Rochester. She received her master's degree in Organizational Psychology from Columbia University, and earned her Leadership Coaching certification from Georgetown University. She was a Wexner Graduate Fellow and now holds a faculty position with the Wexner Foundation. Rae can be reached at www.ringelgroup.com.

ARLENE D. SCHIFF, National Director, LIFE & LEGACY®, Harold Grinspoon Foundation (HGF)

Prior to joining HGF in 2013, Arlene D. Schiff served as the Executive Director of the Jewish Federation of the Berkshires. During her 12-year tenure, she provided visionary leadership while devising and executing strategic plans that centered on community building and garnering support for philanthropic giving. Arlene is a graduate of the University of Massachusetts and holds an M.A. from Harvard University. Arlene can be reached at arlene@hgf.org.

ANDRÉS SPOKOINY, President & CEO, Jewish Funders Network

Andrés Spokoiny is a long-time Jewish communal leader with a history of leading successful organizational transformations. 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. JFN leverages the power and the creativity of networks to produce change in the Jewish World. Prior to joining JFN, Andrés served as the CEO of Federation CJA in Montreal and prior to that, Andrés worked for the American Jewish Joint Distribution Community (JDC) in Paris. As Regional Director for Northeast Europe, he was responsible for several pan-European projects. Before his Jewish communal work, Andrés worked for IBM and was responsible for training, development, hiring, and recruitment for IBM's Latin America Southern Region during a period of major restructuring. Originally from Argentina, Andrés has a multidisciplinary academic background including business, education, and rabbinical studies in different institutions around the world. He is fluent in Hebrew, English, French, Spanish, Portuguese and Yiddish, and is proficient in Russian and German.

FREDRICK WEBER, Senior Wealth Advisor, National Estate Settlement Services Practice, Northern Trust

Fredrick Weber helps guide families through the process of death-related administration of estates and trusts when Northern Trust serves as a fiduciary for a client who has died. Prior to joining Northern Trust in 2011, Fred spent seven years handling post-death administration of estates and trusts for another corporate fiduciary. Prior to becoming a professional fiduciary, he spent six years in private law practice as a trust, estate, and probate attorney, and he also worked as a planned giving officer for a large public charity. Fred is licensed to practice law in Illinois and is a member of the Chicago Bar Association where he is a past chair of the Trust Law Committee. He serves on the Board of the Chicago Estate Planning Council and is a member of the Chicago Council on Planned Giving, the National Association of Charitable Gift Planners, and the Professional Advisory Committee of the Jewish Federation of Metropolitan Chicago. Fred is a long-time board member and past president of Shalva: A Response to Domestic Abuse in Jewish Homes. He also served as a trustee and Vice President of Anshe Emet Synagogue in Chicago. Fred received his B.A. in International Relations and History from the University of Minnesota and his J.D. from DePaul University College of Law. He can be reached at fw14@ntrs.com.

LYNNE WESTER, The Donor Guru, Donor Relations Guru, LLC

Lynne believes that donor relations is the key to unlocking fundraising success and that organizations must be as dedicated to the donor experience as they are to the ask itself. Sometimes referred to as the Olivia Pope of fundraising, Lynne helps organizations when they need it the most – when crisis or opportunity arrive. Lynne and her teammates at Donor Relations Guru, LLC, partner with nonprofits large and small on a variety of initiatives from developing sound strategy and vision, to utilizing technology and creating meaningful donor engagement – all designed to positively affect the fundraising bottom line. Lynne created the DRG website to be used as a unique industry tool filled with resources, samples and thoughtful leadership on donor relations and fundraising. She is regularly featured in publications such as the *Washington Post*, *Chronicle of Philanthropy*, and *CASE Currents*, and has authored three books of her own on a myriad of industry topics. Lynne received her B.A. from the University of South Carolina, holds a master's in strategic Fundraising and Philanthropy from BayPath University, and proudly sports a DUCKtorate from the Disney Institute. Lynne can be reached at www.donorrelationsguru.com.