

2022 Workshop Descriptions

As of 2.15.2022 – *Subject to change*

All times Eastern Time

Sunday, May 15, 2022

7:00 – 9:00 PM

Welcome & Opening Keynote

Winnie Sandler Grinspoon, President, HGF, **Harold Grinspoon**, Founder, HGF, **Arlene D. Schiff**, National Director, LIFE & LEGACY®, HGF, **Dirk Bird**, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, **Julie Platt**, National Campaign Chair, JFNA, **Tamra L. Dollin**, LIFE & LEGACY Community Consultant, HGF, **Laurie Herrick**, Founder of Rainmaker Consulting and Program Director of the GIFT Leadership Institute of JCamp 180®, HGF, **Jamie Light**, Director of Conferences and Events, HGF, **Elana Arian**, Composer

Join us as we kickoff the 2022 LIFE & LEGACY/Create a Jewish Legacy Leadership Gathering! Together we will celebrate the great strides we have made in integrating legacy giving into our communal and organizational culture, while thanking you, our legacy donors, for your commitment to the Jewish future... and there will be some surprises! The keynote will feature Laurie Herrick, author of *Choose Abundance*, who will take us on a journey to examine how shifting from the scarcity mindset so prevalent in our society and organizations today, to behaviors, structures, and a mindset focused on abundance, can result in your organization having the resources it needs to fulfill its highest and most inspired vision. At the conclusion of the Welcome and Opening Keynote, those who would like to delve deeper into the themes Laurie shares, are invited to join in small group discussions.

FORMAT: Large group presentation (90 minutes) with small group discussions (30 minutes) to follow

Monday, May 16, 2022

10:00 AM – 11:30 AM

Using Storytelling in Major and Legacy Fundraising: New Findings, Ancient Origins, and Practical Tips

Russell James, Professor of Personal Financial Planning, Texas Tech University

Connecting with a donor's life story in the right way can be a powerful trigger for legacy giving. But how do we do that? Professor James will share how understanding the ancient origins and the latest research on storytelling can lead to simple, effective, practical techniques that anyone can use to encourage major gifts and legacy commitments more effectively.

FORMAT: Large group presentation (60 minutes) with small group discussions to dive deeper into the storytelling concepts presented (30 minutes)

11:45 AM – 12:15 PM

Marketing & Stewardship Best Practices

Dena Morris Kaufman, LIFE & LEGACY Community Consultant, HGF

Sharing ideas and learning from each other is a hallmark of the LIFE & LEGACY network. Join us to view a PowerPoint presentation of the best in marketing and stewardship ideas implemented by legacy teams and communities across North America. Come get inspired to try something new!

FORMAT: Virtual PowerPoint presentation – no discussion

12:30 – 1:45 PM

The Art of Meaningful Legacy Conversations

Julia Riseman, JCamp 180 Mentor, HGF

If you want to learn strategies to confidently engage in meaningful legacy conversations, and invite donors to join your organization's legacy society, this workshop is for you. Participants will learn easy-to-remember approaches to artfully guide deeply meaningful conversations that lead people to act. The workshop will cover the artistry of a legacy conversation, tips to know what to say and when, and how to adapt to either zoom or in-person meetings.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into the conversation concepts presented (30 minutes)

12:30 – 1:45 PM

Starting Your Journey to Abundance

Laurie Herrick, Author, Founder of Rainmaker Consulting and Program Director of the GIFT Leadership Institute of JCamp 180®, HGF

Recognizing and revealing abundance is a powerful first step to build and strengthen your organization's culture of philanthropy – the attitudes, actions and systems that reflect an understanding, respect, and responsibility for philanthropy's role in the success of your organization. Join Laurie Herrick, author of *Choose Abundance*, for this interactive skill building workshop that builds upon the concepts presented in Sunday evenings Welcome & Opening Keynote. Laurie will start you on your journey to uncover what you have in abundance, how to discover the abundance in others, and how building deeper partnerships with community members can secure the resources your organization needs to fulfill its highest and most inspired vision.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into the abundance concepts presented (30 minutes)

2:15 – 3:30 PM

Navigating Challenging Legacy Conversations

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

Are you anxious about encountering challenging legacy conversations with donors? In this interactive workshop, we will explore some of the most common, difficult topics and learn ways to handle these conversations while deepening your relationships with donors at the same time. Don't let fear prevent you from engaging in meaningful legacy conversations. Learn how to use different tools such as active listening, open questions, focusing on conceptual agreement, and examples to navigate. Bring your challenges and wisdom to share!

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into navigating challenging legacy conversations (30 minutes)

4:00 – 5:15 PM

The Formalization Conversation (A Moderated Panel)

Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, *Beverly Bachrach*, Chief Philanthropy Officer, David Posnack Jewish Community Center, *David Chaifetz*, Legacy Team Leader, Temple Beth Shalom, Sarasota-Manatee, FL, *Dana Rubin*, Development Director, Jewish Family and Children Services of Minneapolis, *Jeri Zimmerman*, Executive Director, Jewish Federation of Lehigh Valley,

What are the best strategies to move a donor from a legacy commitment to legally putting this commitment in place? Join us for this panel discussion exploring the approaches used by different organizations to encourage the formalization of legacy gifts.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into formalization strategies (30 minutes)

6:00 – 7:00 PM

Focus Groups by Organizational Type

Focus groups provide an opportunity for attendees to get together with peers from similar types of 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, Chabad, Conservative congregations (with membership less than 250), Conservative Congregations (with members more than 250+), Orthodox Congregations, Reform Congregations (with membership less than 250), Reform Congregations (with membership more than 250+), Congregations (other than Reform, Conservative, Orthodox & Chabad), Day School (Preschool – High School), Jewish Community Foundation Directors, Jewish Education Agencies, Jewish Federation Senior Staff (Execs, Development Directors), LIFE & LEGACY® Community Legacy Coordinators, Hillel, Holocaust Education, Historical Societies/Museums, JCC, Jewish Family Service type organizations, Jewish Federation Staff (Non-Senior Staff), Other Social Service Organizations, Senior Living Facilities.** Register for the focus group that most closely aligns with your organizational type.

FORMAT: Breakout room discussions

7:30 – 8:45 PM

Keynote: Legacy in a Time of Change

Daniel Held, Chief Program Officer, UJA Federation of Greater Toronto

The Jewish community of Toronto is experiencing a moment of transformative change. Amidst the disruptions due to COVID-19, the community is orchestrating a change in their culture of philanthropy, building both grassroots support and mega philanthropy, expanding both annual campaigns and endowments. Join us for a moderated discussion with Daniel Held, the Federation professional who has been championing this work, as he shares the structure his community is building and his learnings – both positive and negative. Leading through change is the focus of this keynote – identifying the right partners, trying new ideas, creating multiple opportunities for donors to participate at any level. The inspiring lessons Daniel will share are replicable in communities of all sizes.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive into the learnings shared from Toronto's effort to change their culture of philanthropy (30 minutes)

Tuesday, May 17, 2022

12:00 – 1:00 PM

Focus Groups by Area of Interest

Focus groups provide an opportunity for attendees to discuss topics of similar interest with peers, to share best practices and brainstorm around challenges. Don't miss this opportunity to network with colleagues in small group discussions! Share your wisdom and learn from others. Areas of interest include: **Legacy Marketing, Donor Stewardship, Legacy Team Management, Board Engagement, Legacy Giving for Membership Organizations (JCC, synagogues, etc.), and Formalization**

FORMAT: Breakout room discussions

1:30 – 2:45 PM

Think Big! Expand Your Legacy Giving Outreach and Acquire New Donors

Patrick Schmitt, Co-CEO, FreeWill

How can you reach beyond your initial legacy donors? Reaching your oldest community members who are already thinking about how to leave a legacy and connecting with younger, charitable, and impact-oriented donors is crucial to your ability to secure the future for the next generation. Join Patrick Schmitt, Co-CEO of *FreeWill*, to learn about key demographic trends impacting legacy giving, and how to reach out to a wide group of supporters. Patrick is an innovator in the legacy giving field and his personable style makes it easy to ask questions and benefit from his and FreeWill's experience.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to further discuss current trends and how you and your legacy team can think bigger (30 minutes)

3:15 – 4:30 PM

Engaging Next Generation Donors in Your Legacy Initiative and More

Sharna Goldseker, Founder, 21/64

Join us for this informative and lively workshop featuring *Generation Impact* co-author Sharna Goldseker, today's leading expert on multigenerational and next generation philanthropy. Sharna will share seminal, first-of-its-kind research on this highly influential population, offer suggestions for how best to engage these next generation donors and family members, provide insight into how next gen donors are initiating important multigenerational conversations, as well as how they are using all the tools in their philanthropic toolbox for impact. *This session will not be recorded* so don't miss this opportunity to learn how to engage this next generation of donors who are inheriting wealth, as well as amassing their own resources and choosing to be philanthropic earlier in their lives than previous generations.

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into the information presented (30 minutes)

5:00 – 6:15 PM

Creating a Culture of Volunteerism: Volunteer Engagement and Management

Ashley Pressman, Executive Director, Jewish Volunteer Connection

Creating a culture of volunteerism is part psychology and part management. This workshop will help you gain an understanding of how to use common volunteer motivations to build a strong, effective legacy team by improving the culture of service on your team and in your organization. Ashley will share specific strategies and tools to build your team, engage your volunteers, show your appreciation, and share the impact of all they accomplish. Bring your questions about working with teams and have them answered by a volunteer expert!

FORMAT: Large group presentation (45 minutes) followed by small group discussions to dive deeper into the concepts of volunteer engagement and management (30 minutes)

5:00 – 6:00 PM

Jewish Future Pledge and LIFE & LEGACY: Leveraging the Strength of Two Powerful Frameworks to Deepen Donor Engagement and Advance Legacy Giving

Dirk Bird, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, JFNA, *Arlene D. Schiff*, National Director, LIFE & LEGACY

Join us as we explore how the Jewish Future Pledge and LIFE & LEGACY are partnering with communities to make legacy giving normative behavior in the Jewish community. We will discuss how both frameworks may be used together to engage and steward current and potential donors and hear from community representatives to learn how they are using both as part of their overall donor engagement strategy.

FORMAT: Large group presentation

7:00 – 8:30 PM

2022 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 & Endowment, Managing Director, Total FRD, JFNA, *Elana Arian*, Composer

Please join us as we celebrate the newest communities to complete the four-year LIFE & LEGACY® curriculum: **Atlantic & Cape May Counties, Dayton, Greater Denver, Nevada, New Mexico, Northeastern NY, Pittsburgh, and Rochester!** We will also announce and honor the 2022 Gail Littman Award winner, and bring to conclusion our three days of networking, learning new skills, sharing successes, and brainstorming around challenges.

FORMAT: Large group presentation