



## COURSE DESCRIPTIONS 2017



August 7-9, 2017

ALPHA ORDER, BY PROGRAM SCHEDULE

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### MONDAY, AUGUST 7      OPENING PROGRAM    5:00PM

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#### MEET & GREET YOUR FEDERATION COLLEAGUES

Meeting, networking, and building connections with colleagues are an important (and fun) component of the work we do as a global organization. The highlight of a national conference is the opportunity to meet colleagues from across the country and share different program ideas and best practices.

#### WELCOME TO THE WONDERFUL WORLD OF FEDERATION

I LEAD participants will learn all the various aspects of the Jewish Federation system. This interactive round-robin will allow new and entry level professionals to meet the national staff while understanding the partnership and support of JFNA.

#### DINNER AND OPENING PROGRAM

Welcome to Phoenix – *Marty Haberer, Executive Director, Jewish Federation of Greater Phoenix*

Ethiopian National Project – *Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA*  
*Sefitu Ezra, Ethiopian National Project SPACE Alumna, Beersheva*

#### DESSERT RECEPTION

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### TUESDAY, AUGUST 8      COURSE BLOCK 1    9:00AM – 12:00PM

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#### CAMPAIGN 101

This interactive session will provide new development professionals with the opportunity to gain a solid foundation of critical campaign tools. Participants will explore core the principles, practices, and skills needed for fundraising success.

##### Course Objectives:

- Understand the principles and elements of FRD (Financial Resource Development)
- Discover how to integrate a community campaign, an affinity campaign and a stewardship program to maximize fundraising achievement
- Learn how to build and grow successful lay/pro partnerships

**Who Should Attend?** New campaign professionals who have been at the Federation for less than 1.5 years.

**Faculty:** *Beverly Woznica, JFNA, Managing Director, Financial Resource Development*

*Lori Tessel, Chief Development Officer, Valley Alliance, Jewish Federation of Greater Los Angeles*

## I-LEAD 2017 Course Descriptions

### CAMPAIGN 201

This workshop will teach professionals the elements of developing a successful campaign plan and the fundamentals of a successful fundraising program.

**Course Objectives:**

- Learn strategies to plan the work and work the plan
- Build a moves management program that will maximize giving to all income streams

**Who Should Attend?** Campaign professionals with 1.5 – 3 years' of experience

**Faculty:** *Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA*  
*Catherine Schneider, Associate Chief Development Officer, Jewish Federation of Los Angeles*

### JEWISH EDUCATION AND ENGAGEMENT

Together, participants will define engagement; discuss the relationship between education and engagement, and share ideas, models, best practices, and an overall understanding of how to engage. This session will be a combination of case studies and time to share about the work taking place in the field. Seasoned engagement professionals will serve as faculty and mentors. Meet them in this session, and then join them for breakfast or lunch during the conference for some one on one conversation.

**Course Objectives:**

- Gain a knowledge of the core principles of engagement
- Develop the skills for program planning and partnering with lay leadership

**Who Should Attend?** Engagement Professionals

**Faculty:** *KB Goodkin, Director, Jewish Engagement and Advancement, Jewish Federation of Northeastern NY*  
*Debbie Yunker Kail, Executive Director, Hillel, Arizona State University*

### NEW ENDOWMENT PROFESSIONALS INSTITUTE –(NEPI)

***\*This is a 2-part series. Participants must register and attend BOTH sessions beginning on Monday morning, Aug. 7, 2017.***

This two-part series will provide new endowment professionals with the opportunity to explore key principals, practices, and skills needed to succeed in their roles. From the context for planned giving, to vehicles and policies around planned gifts, to building relationships with donors and meeting their goals, this course will prepare professionals to execute a planned giving and endowment strategy.

**Course Objectives:**

- Become familiar with the vocabulary and concepts of gift planning and endowments
- Gain the ability to recognize signals and situations that are ripe for planned giving
- Develop confidence to work with donors, prospects, and professional advisors to create a legacy

**Who Should Attend?** New endowment and planned giving professionals

**Faculty:** *Alan Gross, Vice President Jewish Federation of Cleveland*  
*Carolyn Rose, Director, Jewish Community Foundation of Palm Beach County*

## I-LEAD 2017 Course Descriptions

### SEMINAR FOR YOUNG LEADERSHIP & NEXT GEN ENGAGEMENT PROFESSIONALS

This highly interactive session will help Federation professionals who work with young adults (20's-40's) gain the skills and perspectives that contribute to being successful. Participants will learn to design experiences that appeal to the interests of young adults today – and deepen their commitment to Jewish life and leadership. Learn from case studies of actual program strategies drawn from Federation, the Jewish communal realm and beyond. Take new insights and best practices home to your local community! Prepare to be engaged, and get excited!!

#### Course Objectives:

- Gain fundamental knowledge and strategies vital for your success as a Federation professional
- Understand how to engage the next gen audience
- Share experiences with colleagues similarly positioned across the Federation movement

**Who Should Attend?** Young Leadership & Next Gen Engagement Professionals

**Faculty:** Emily Winograd, Innovation Lead, Design Services, UpStart

### THE MAGIC OF MANAGEMENT; LEADING AND SUPERVISING OTHERS

This course session will explore behavioral strategies and new trends to become a strong manager and supervisor. Participants will learn the nuances of influence to motivate and inspire others to achieve a higher level of performance and success in leadership, communications, and teamwork.

#### Course Objectives:

- Gain fundamental knowledge and management strategies vital for your success
- Assess your own personal leadership characteristics and behavioral strategies
- Explore proven ways to develop your tool box to enhance your management style

**Who Should Attend?** Professionals in a supervisory capacity

**Faculty:** Scott Asalone and Jan Sparrow, A&S Global Management Consulting, Inc.

**TUESDAY, AUGUST 8**

**COURSE BLOCK 2**

**1:45PM – 3:00PM**

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### BUILDING EFFECTIVE TEAMS

Group interaction is the foundation for community building; from volunteer committees and boards to staff teams and professional collaborations. This interactive workshop will engage participants to learn how to work with committees and build successful teams.

#### Course Objectives:

- Gain a framework of a collaborative working partnerships
- Learn to facilitate successful group dynamics and decision making
- Understand the importance of honoring the needs and expectations of the group

**Who should attend?** Open to all

**Faculty:** Scott Asalone and Jan Sparrow, A&S Global Management Consulting, Inc.

## I-LEAD 2017 Course Descriptions

### CREATING YOUR PERSONAL LEADERSHIP STYLE

An introduction to the anatomy of leadership, this highly interactive workshop will show you how body, language, and emotions connect to create your personal style. This session will focus on ways to impact your emotions and language through body dispositions.

**Course Objectives:**

- Discover the five foundational body dispositions for leaders
- Understand the impact your body has on your emotions and your language
- Learn how to bring more choice to your emotional responses

**Who Should Attend?** Open to all

**Faculty:** *Deborah Baron, Chief Operating Officer, Jewish Federation of Pittsburgh*

### ENDOWMENT TOOL BOX FOR NON-ENDOWMENT PROFESSIONALS

Today's strong Federation professionals understand fundamental concepts of planned giving. Learn how to open the door to legacy conversations and how to navigate the steps that will lead to establishing an endowment gift.

**Course Objectives:**

- Demystify the language and concepts of planned giving and endowments
- Recognize situations that make a donor ripe for a planned giving conversation
- Develop comfort and confidence to speak with donors about their legacies

**Who Should Attend?** Open to any non-endowment professional

**Faculty:** *Richard Kasper, President and CEO, Jewish Community Foundation of Greater Phoenix*

### FED 101

This hands-on course is designed for those wishing to explore the basics of the Federation movement. Federation 101 will educate newer Federation professionals about the history of Federations and provide participants with a better understanding of the national and global work of our system.

**Course Objectives:**

- Learn the history and importance of the Jewish Federation movement
- Gain practical skills and techniques for working in a Federation
- Understand the relationship with our domestic and overseas partners

**Who Should Attend?** Open to all

**Faculty:** *Molly Wernick, JFNA, Manager of Talent Development, Mandel Center for Leadership Excellence*

### NAVIGATING DIFFICULT SITUATIONS IN A POLARIZED ERA

This session will allow participants to learn how to navigate the tricky political issues that impact our work.

**Course Objectives:**

- Learn how to respond to challenging conversations
- Understand the nuances of language when speaking about the current political climate

**Who Should Attend?** Open to all

**Faculty:** *Rabbi Doug Kahn, Executive Director Emeritus, San Francisco JCRC, Broad Tent Consulting*

## I-LEAD 2017 Course Descriptions

### TWO SIDES OF THE ENGAGEMENT COIN; CAMPAIGN AND COMMUNITY

Relationship building is a vital component of successful fundraising and community building- so what are the steps you take to build relationships and grow philanthropic investment across all income stream: Annual, Planned Giving, Capital or Special Projects? Learn to bring someone on the journey from being a prospect to becoming a donor and maybe even to community leader.

**Course Objectives:**

- Learn how to build an individual development plan for each of your donors
- Explore engagement opportunities
- Create a moves management plan as a tool to advance engagement

**Who Should Attend?** Open to all

**Faculty:** *Miryam Rosenzweig, Chief Development Officer, Jewish Federation of Greater Detroit*

### CHALLENGING PERSON, DIFFICULT CONVERSATION: WHAT TO DO?

Through this interactive workshop, participants will be engaged and learn critical skills to become an influential communicator. Professional communications consultants will teach the fine art of having challenging conversations.

**Course Objectives:**

- Learn the six step process to help ease into the conversation
- Gain skills to know how to defuse negative discussions

**Who Should Attend?** Open to all

**Faculty:** *Scott Asalone, A&S Global Management Consulting, Inc.*

### MEETING PEOPLE WHERE THEY ARE – WHERE DO WE START?

From planning, marketing or the needs of campaign, the power of a strong relationship building is essential to the success of any Federation professional. This course will provide engagement strategies and innovative methodologies to meet the needs of the 21<sup>st</sup> century Jewish community.

**Course Objectives:**

- Knowing your prospects and meeting them where they are
- Understand the importance of honoring the needs and expectations of constituents

**Who should attend?** Open to all

**Faculty:** *Rabbi Mike Uram, Executive Director and Campus Rabbi for the Hillel at the University of Pennsylvania and Author*

## I-LEAD 2017 Course Descriptions

### POSTING WITH PURPOSE: BUILDING A SOCIAL MEDIA STRATEGY

Learn to create digital marketing strategies that are meaningful, manageable, and measurable. With a focus on specific areas, you will gain the tools necessary to develop a proprietary framework that positions your Federation for digital success.

#### Course Objectives:

- Defining the purpose of your social marketing efforts
- Developing social media personas
- Creating measurable goals and objectives
- Building a social media content plan and calendar
- Framing a social media measurement plan

**Who Should Attend?** Open to all

**Faculty:** *Jeff Rum, Founder and CEO, Ignite*

### SOLICITATION SKILLS BOOT CAMP

You know the basic building blocks of Federation fundraising, so now it's time to hone your craft and become a master of relationship-driven solicitations. This interactive session will focus on strengthening your skills and confidence as a solicitor, navigating the often non-linear stages and choreography of the face-to-face solicitation process, as well as becoming more attuned to donor's interests so that they best align with Federation's priorities.

#### Course Objectives:

- Develop confidence for personal solicitations
- Strengthen your comfort level to make the ask
- Learn to build a rapport with donors to align with Federation's priorities

**Who Should Attend?** Open to all

**Faculty:** *Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA*

### STAND UP, SPEAK UP!

Does speaking to a group make you nervous? Are you afraid to talk in front of an audience? This is an interactive session for participants to gain confidence in their presentation skills.

#### Course Objectives:

- Application of skills and tactics to gain self confidence in speaking
- Practical modalities and feedback provided

**Who Should Attend?** Open to all

**Faculty:** *Jan Sparrow, A&S Global Management Consulting, Inc.*

### TZEDEKAH, TIKUN OLAM, & OTHER JEWISH VALUES IN THE WORKPLACE

Let's talk about the "Jewish" in "Jewish Federation" – For some donors, Federation engagement is an expression of their only connection to Jewish life. During this session, we will explore ways we can deepen our Jewish conversations and connect to the work of the Federation. This session will explore Jewish topics most relevant for professional life in a Federation.

#### Course Objectives:

- Gain understanding of how Jewish values impact our work
- Understand how social justice is a foundation for Federation involvement

**Who Should Attend?** Open to all

**Faculty:** *Rabbi Doug Kahn, Executive Director Emeritus, San Francisco JCRC, Broad Tent Consulting*

**WEDNESDAY, AUGUST 9**    **COURSE BLOCK 4**    **8:15AM-9:45AM**

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**BEST PRACTICES FOR YOUR AFFINITY**

**DEVELOPMENT - ANNUAL GIVING, MAJOR GIFTS, SUPPLEMENTAL, AFFINITY GROUPS, & WOMEN'S PHILANTHROPY**

**JEWISH EDUCATION & ENGAGEMENT**

**PLANNED GIVING & ENDOWMENT**

**YOUNG LEADERSHIP & NEXT GEN**

**WEDNESDAY, AUGUST 9**    **CLOSING PROGRAM**    **10:00 AM-11:30 AM**

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**THE WHY LINE**

Join us for a closing program that brings each of us to the heart of what inspires the work we do in Federations every day. First, hear TED-style presentations from three specially selected speakers and then trace back the “why” of what brought you here today.

- *Abra Annes, Member of National Young Leadership Cabinet and Founder, Generosity Auctions*
- *Rabbi Doug Kahn, Executive Director Emeritus, San Francisco JCRC, Broad Tent Consulting*
- *Rabbi Mike Uram, Executive Director and Campus Rabbi for the Hillel at the University of Pennsylvania and Author*

**Closing Remarks**

- *Jerry Silverman, President and CEO, Jewish Federations of North America*