



# JFNA PROFESSIONAL INSTITUTE

**Baltimore, MD**  
February 11-13, 2019



The Jewish Federations  
OF NORTH AMERICA

# MONDAY

## FEBRUARY 11, 2019

10:00-11:30AM

### Optional Volunteer Activity

Join the Jewish Volunteer Connection Team of Baltimore for a service learning experience. You will have a chance to work on projects to benefit the community here, as well as learn about ways to bring these activities to your home community.

**LOCATION** Constellation Ballroom F  
**SPEAKER** Abigail Malischostak, Senior Associate, Community Partnerships, Jewish Volunteer Connection

12:30-2:30PM

### Lunch and Opening Keynote Address: Navigating Difficult Conversations

Difficult conversations are at the heart of our work as Federation professionals. This session will help us understand why some of our most important conversations are so hard, examine the common mistakes we all make and offer a step-by-step method for handling them.

**LOCATION** Constellation Ballroom A & B  
**SPEAKER** Debbie Goldstein, Principal and Managing Director, Triad Consulting Group

2:30-5:30PM PICK ONE:

### From Difficult to Learning Conversations

Everyone has difficult conversations—those you wish you could avoid or outsource. Tailored to face the kinds of conversations you find challenging, this interactive session will offer framework and tools to help turn these situations into opportunities to deepen your relationships.

**LOCATION** Constellation Ballroom C  
**SPEAKER** Whitney Benms, Consultant, Triad Consulting Group

### Influencing in the Face of Resistance

Anytime we need to get someone on board with an initiative, with financial support, or to buy into a change effort—we are influencing. This interactive session will show how the key is to determine what is causing the other side to resist. Using your live examples, we will learn how to understand and lower their resistance, in order to increase our influence.

**LOCATION** Constellation Ballroom A & B  
**SPEAKER** Stevenson Carlebach, Consultant, Triad Consulting Group

### Effective Feedback Conversations

We swim in a sea of feedback. We are giving it all of the time. Or should be. The problem is that we're often not doing it in a way that the recipient will best hear and implement it. This highly applied session will focus on how to give feedback in a much more recipient-focused way and you'll prepare for and practice for real conversations you need to have.

**LOCATION** Constellation Ballroom E  
**SPEAKER** Debbie Goldstein, Principal and Managing Director, Triad Consulting Group

5:30-6:30PM

### Cocktail Hour and Networking Session

Get to know Federation professionals from across the country and across departments, before breaking into your affinities for dinner and programming.

**LOCATION** Harborview

6:30-7:00PM

### Dinner

Pick up your dinner at one of the buffet stations and head to your affinity program. See your affinity page for more details.

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JEWISH EDUCATION & ENGAGEMENT 5  
PLANNING AND ISRAEL & OVERSEAS 6  
MARKETING 7-8

# TUESDAY

## FEBRUARY 12, 2019

7:15-8:15AM

### Breakfast for All

**LOCATION** Constellation Ballroom A & B

8:15AM-12:30PM

### Affinity Programming

Spend this time in unique programming especially for your affinity group. See your affinity page for details on each program.

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MARKETING 7-8

12:30-1:45PM

### Talk About Talent: Lunch and Open Town Hall Discussion on the Future of Federation Professionals

One of the most urgent challenges to the sustainability of Federation is how to ensure a pipeline of high performing leaders capable of adapting to the inevitable changes facing our communities. We've all got questions about our role in Federation, what the future holds for us and what the vision is in order to implement significant change. Come to this lunch program ready with questions to ask leaders from both Federation and foundations that work within the Jewish nonprofit community.

**LOCATION** Constellation Ballroom A & B  
**SPEAKERS** Marc Terrill, Chief Executive Officer, The Associated: Jewish Community Federation of Baltimore  
Dr. Shari Cohen, Vice President, Mandel Center for Leadership Excellence, JFNA  
Rachel Garbow Monroe, President and Chief Executive Officer, The Harry and Jeanette Weinberg Foundation

**MODERATOR** Ashleigh Wong, Director of Development, JEWISHcolorado  
Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA

2:00-5:30PM

### Affinity Programming

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### CONFERENCE CONCLUDES FOR THOSE NOT ATTENDING THE TEAM DAY ON WEDNESDAY.

FOR EVERYONE STAYING, ENJOY A NIGHT ON YOUR OWN IN BALTIMORE.

# WEDNESDAY

## FEBRUARY 13, 2019

7:15-8:15AM

### Breakfast for All

**LOCATION** Constellation Ballroom E & F

ALL DAY PRE-REGISTRATION REQUIRED

### Team Day: Building a Foundation for Collaborating Across Silos

During this workshop, participating Federation teams will work through a powerful set of discussions and exercises to create a foundation from which they can more effectively collaborate across the key functions of FRD, Planning, Marketing and Jewish Education and Engagement. Teams will leave with an action plan for how to continue the work when they are back home.

**LOCATION** Constellation Ballroom A & B

# FRD

## MONDAY, FEBRUARY 11, 2019

7:00-9:30PM

### Dinner and FRD Opening Program: 360° Philanthropy

Enjoy a networking opportunity during dinner, while mentors and mentees will be paired up as part of a mentorship program. Participate in a dialogue of family philanthropy and engagement, with members of the Joseph and Harvey Meyerhoff Family Charitable Funds, moderated by Leslie Pomerantz. Then get to know people in the room with Ashleigh Wong.

**LOCATION** Constellation Ballroom E & F  
**SPEAKERS** Leslie Pomerantz, Chief Development Officer, The Associated: Jewish Community Federation of Baltimore  
Ashleigh Wong, Director of Development, JEWISHcolorado  
Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA

## TUESDAY, FEBRUARY 12, 2019

8:15-10:15AM

SEE NAME BADGE FOR ASSIGNMENT

### Increase Top Campaign Dollars

Major gifts fundraising is part art and part science. Neither should be underestimated or underutilized. Relationship building, communication and solicitation skills (the ART) are vital to the success of any campaign—but can't be maximized without strategy, methodology and discipline (the SCIENCE). This session will outline a process that can be applied to campaigns of all sizes—with a special focus on the identification, cultivation and stewardship of major gifts.

**LOCATION** Constellation Ballroom F  
**SPEAKERS** Rachel Sternberg, JFNA Community Consultant Team Member  
Vicki Agron, JFNA Community Consultant Team Member

### ABCs of Endowments

Lose your fear of endowments. Learn the basics of planned giving so you can introduce the subject to donor prospects with confidence. Join us as we explore everything you will need to know—and what you don't have to worry about.

**LOCATION** Constellation Ballroom E  
**SPEAKERS** Dirk Bird, JFNA Community Consultant Team Member  
Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA

10:30-11:30AM | 11:30AM-12:30PM

PICK ONE—SESSIONS WILL REPEAT:

### 21st Century Philanthropy: What Does That Mean for You?

Trends in 21st century philanthropy are playing a big role inside and outside the Jewish communal world. Join a discussion with Michael Moody and Andrea Wasserman as we explore the rapidly evolving and complex landscape of philanthropy and social innovation, and what that means for you back home.

**LOCATION** Constellation Ballroom E  
**SPEAKERS** Michael Moody, Frey Foundation Chair for Family Philanthropy, Dorothy A. Johnson Center for Philanthropy, Grand Valley State University  
Andrea Wasserman, Founder and Chief Executive Officer, Social Profit Ventures

### Unpacking the Federation Story

Sharpen your storytelling skills by meeting Baltimore agency recipients and learn how to unpack the Federation story. Join us as we unravel the importance of Federation and the impact it has on individual lives so you can shape how you share stories with donors and encourage giving.

**LOCATION** Constellation Ballroom D  
**SPEAKERS** Mark Medin, Executive Vice President, Financial Resource Development, UJA-Federation New York  
Leslie Pomerantz, Chief Development Officer, The Associated: Jewish Community Federation of Baltimore

### Endowments—Everyone Has a Role: Recognizing Endowment Opportunities

Create an endowment culture to increase all income streams by building trust and collaboration with everyone—those in your building, lay leaders and professional advisors.

**LOCATION** Constellation Ballroom F  
**SPEAKERS** Alan Gross, Vice President, Retired, Jewish Federation of Cleveland  
Carolyn Rose, Vice President, Jewish Community Foundation, Palm Beach County  
Michael Friedman, Senior Vice President, Philanthropic Planning and Services, The Associated: Jewish Community Federation of Baltimore

2:00-3:30PM

SEE NAME BADGE FOR ASSIGNMENT

### Increasing Campaign Dollars with Data and Metrics

We hear a lot about Big Data and needing to develop savvy strategies, but analytics can be overwhelming, or even mysterious. What do we mean when we talk about campaign analytics? How can they be truly helpful? How do you pivot to maximize resources, get the right message out and increase revenue?

**LOCATION** Constellation Ballroom F  
**SPEAKERS** Lesley Cole, Owner, Jigsaw Analytics  
David Gonzalez, Chief Data Officer, Jigsaw Analytics

### Centrality of My Federation: Repositioning and Rebranding My Story

Those of us who work to raise the money for Federation know the impact of the funds. But sometimes the sheer volume of what we do and the day to day nature of it lessens our ability to frame our own stories in a powerful and focused way. Three Federation professionals that have experienced dramatic events will provide an elevator speech through the lens of dramatic challenges, combined with "normal" day to day. And everyone in the session will have an opportunity to craft their own impact statement and receive feedback if they choose.

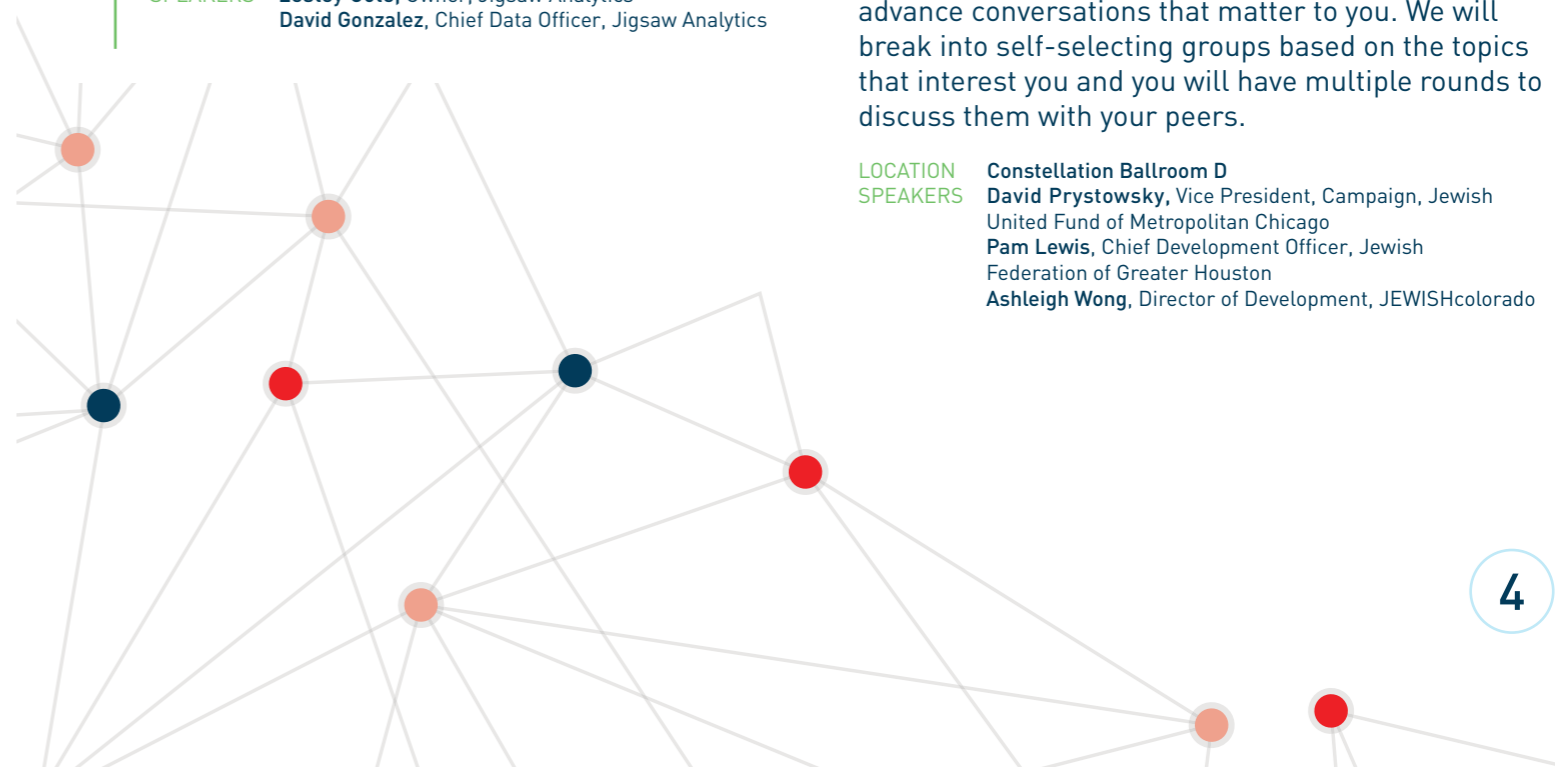
**LOCATION** Constellation Ballroom E  
**SPEAKERS** Jessica Brown Smith, Senior Director of Development, Jewish Federation of Greater Pittsburgh  
Taryn Baranowski, Chief Marketing Officer, Jewish Federation of Greater Houston  
Brian Abrahams, Senior Vice President, Financial Resource Development, JFNA

3:30-5:30PM

### Open Space: You Choose the Conversation!

Are there topics we didn't cover that you want to discuss? Here's your chance! You will create and advance conversations that matter to you. We will break into self-selecting groups based on the topics that interest you and you will have multiple rounds to discuss them with your peers.

**LOCATION** Constellation Ballroom D  
**SPEAKERS** David Prystowsky, Vice President, Campaign, Jewish United Fund of Metropolitan Chicago  
Pam Lewis, Chief Development Officer, Jewish Federation of Greater Houston  
Ashleigh Wong, Director of Development, JEWISHcolorado



# JEWISH EDUCATION & ENGAGEMENT

**MONDAY, FEBRUARY 11, 2019**

**7:00-9:30PM**

## Dinner and Opening Program: Bringing Our Own “Torah” to the Table

Through an interactive opening workshop, we'll dive right into thinking about how we approach our work and about our prior Jewish experiences. We will spend time learning about our colleagues, their work, our challenges and our goals for our upcoming time together.

**LOCATION** Constellation Ballroom C  
**SPEAKER** Rabbi Josh Bolton, Director and Senior Jewish Educator, Jewish Renaissance Project at Penn Hillel  
Rabbi Jessy Dressin, Senior Director of Jewish Life, JCC of Greater Baltimore, and Founder, Charm City Tribe

**TUESDAY, FEBRUARY 12, 2019**

**8:15-10:15AM**

## Empowerment Jews and Engagement Jews: What Do We Need to Know?

Spend the morning session thinking about our audience and the appropriateness of “engagement” for who they are. How would we categorize them? Given that, how do we build community? We know coffee dates work for engagement but after the coffee date, then what?

**LOCATION** Constellation Ballroom C  
**SPEAKER** Rabbi Josh Bolton, Director and Senior Jewish Educator, Jewish Renaissance Project at Penn Hillel

**10:30AM-12:30PM**

## Am I a Jewish Educator? (Spoiler Alert, YES!)

Explore the relationship between Jewish education and Jewish engagement. How do we leverage one to succeed in the other? How do we benefit from using life as our classroom? And what are people “learning” in engagement spaces?

**LOCATION** Constellation Ballroom C  
**SPEAKER** Rabbi Jessy Dressin, Senior Director of Jewish Life, JCC of Greater Baltimore, and Founder, Charm City Tribe

**2:00-3:45PM PICK ONE:**

## Building Our Tool Box: Telling Our Jewish Stories Through Our Work

Putting what we learned into action by telling our Jewish stories.

**LOCATION** Constellation Ballroom C  
**SPEAKER** Rabbi Jessy Dressin, Senior Director of Jewish Life, JCC of Greater Baltimore, and Founder, Charm City Tribe

## Building Our Tool Box: Broadcasting Engagement Beyond Our Inner Circles

Putting what we learned into action through broadcasting engagement.

**LOCATION** Pratt/Calvert  
**SPEAKER** Rabbi Josh Bolton, Director and Senior Jewish Educator, Jewish Renaissance Project at Penn Hillel

**4:00-5:30PM**

## Nu, Now What? Bringing These Lessons Home

Why does engagement matter in the context of our work at Federations? We'll make the connections and unpack the realities of our work in our final session together.

**LOCATION** Constellation Ballroom C  
**SPEAKER** Dr. Beth Cousens, Associate Vice President, Jewish Education & Engagement, JFNA

# PLANNING AND ISRAEL & OVERSEAS

**MONDAY, FEBRUARY 11, 2019**

**7:00-9:00PM**

## Dinner and Opening Program: The Future Begins Yesterday

Hear about trends that may impact Jewish Federations in the next 5-20 years in an interactive journey focused on future thinking.

**LOCATION** Constellation Ballroom D  
**SPEAKER** Trista Harris, Philanthropic Futurist  
**RESPONSE** David Rubovits, Senior Vice President, Planning & Allocations, JUF/Jewish Federation of Metropolitan Chicago  
Mark Gurvis, Executive Vice President, JFNA

**TUESDAY, FEBRUARY 12, 2019**

**8:15-10:15AM**

## Using Future Thinking to Drive Strategic Planning

Focus on strategic planning using the foundations of future thinking.

**LOCATION** Columbia/Frederick  
**SPEAKER** Trista Harris, Philanthropic Futurist

**10:30-11:30AM**

## Overseas Funding Today

Dig into the data and see how Federations are funding our historic partners and thinking about priorities overseas in their local communities.

**LOCATION** Columbia/Frederick  
**SPEAKERS** Rina Goldberg, Managing Director, Global Operations, JFNA  
Chana Siff, Director, Israel and Overseas, The Associated: Jewish Community Federation of Baltimore  
Jessica Mehlman, Chief Planning Officer, Jewish Federation of Greater MetroWest NJ

**11:30AM-12:30PM**

## Gathering Your Jewish Community on The Front Porch—Atlanta’s Bold Community Vision Process

Learn about Atlanta’s exploration to understand what it means to be a rich, vibrant and relevant Jewish community at this moment in history.

**LOCATION** Columbia/Frederick  
**SPEAKERS** Jodi Lox Mansbach, Chief Impact Officer, Jewish Federation of Greater Atlanta  
Liz Alperin Solms, Principal, Insyte Partners

**2:00-5:30PM**

## Program Showcase

In a cross between PechaKucha (Japanese for chitchat) and Ted Talks, colleagues present creative, groundbreaking, replicable initiatives.

**LOCATION** Columbia/Frederick

### Aging in Place: A Concierge Model of Care

Karen Galin, Associate Vice President, Health and Human Services, JUF/Jewish Federation of Metropolitan Chicago

**From Stigma to Stage: Helping Youth Find and Share their Voice**  
Meredith Zylberberg, LMSW, Planning Executive, Caring Department, UJA-Federation of New York

### Engaging Community Through Mikvah

Caron Blau Rothstein, Director of Community Planning and Allocations, Jewish Federation of Greater Portland

### iCAN (I Can Answer Now)

Lisa Harris Glass, Chief Planning Officer, Jewish Federation of Northern New Jersey

### Innovation in Jewish Community Day School Model

Ilan Hurvitz, Chief Strategy Officer, Jewish Federation of Palm Beach County

**Role Models for Everyone—Employing Ethiopian-Israeli Educators**

Dahlia Bendavid, Israel and Overseas Director, Greater Miami Jewish Federation

### Leaning In: From Planning to Action

Michael Oberlander, Chief Philanthropy Officer, Jewish Federation of St. Louis

### Getting From Point A to Point B: Why Senior

Transportation Matters  
Robin Loeb, MS, MSW, Chief Operating Officer, Jewish Federation of Greater Phoenix

# MARKETING

MONDAY, FEBRUARY 11, 2019

7:00-8:30PM

## Marketing Welcome Dinner

The entire marketing cohort joins together for an informal kick-off and opportunity to socialize, which will include a review of the JFNA Strategic Taskforce results and recommendations.

**LOCATION** Baltimore/Annapolis  
**SPEAKER** Renee Rothstein, Senior Vice President, Strategic Marketing and Communications, JFNA

TUESDAY, FEBRUARY 12, 2019

8:15-10:15AM

## Demystifying Digital

Did you know that Facebook is a good place to find your next donor? Did you know that there is a mathematical formula that can tell you what the ROI will be with a \$100 ad boost on Facebook? Do you know if your Federation shows on a google map search? Spend two hours with a former Facebook executive, learning tips and best practices on how to devise your marketing strategy and analyze success.

**LOCATION** Baltimore/Annapolis  
**SPEAKER** Terry Rice, Founder, Brooklyn Digital Marketing

## DIGITAL TRACK

10:30AM-12:30PM

## Demystifying Digital CONTINUED

The digital landscape is moving at lightning speed. Every industry has been affected by the advances in digital, including nonprofits. Continue learning throughout the day about all that digital marketing can encompass, and how you can track and analyze your marketing efforts with data-driven decisions.

**LOCATION** Baltimore/Annapolis  
**SPEAKER** Terry Rice, Founder, Brooklyn Digital Marketing

2:00-5:30PM

## Demystifying Digital CONTINUED

**LOCATION** Baltimore/Annapolis  
**SPEAKER** Terry Rice, Founder, Brooklyn Digital Marketing

## DIVERSIFIED MARKETING TRACK

10:30-11:00AM

## Federation Success Stories

Through strategic digital engagement, UJA-Federation of New York was able to generate 7,000 new emails leads. And in just one year Jewish Federation of Greater Philadelphia has grown a podcast that attracts more than 1,000 downloads monthly. Hear their stories and learn how they did it.

**LOCATION** Chesapeake A & B  
**SPEAKERS** Miriam Kriegel, Executive Director, Brand Strategy, UJA-Federation of New York  
Steven Rosenberg, Chief Marketing Officer, Jewish Federation of Greater Philadelphia

11:00AM-12:30PM

## Trends in Nonprofit Marketing Performance: Avoiding Road Blocks and Potholes

Learn insights from her just-released 2019 Nonprofit Communications Trends Report, the only annual research report focusing exclusively on the work of nonprofit communications teams. We'll take an especially close look at some of the major strategic gaps in nonprofit communications plans and how to fill them, in order to improve your team's performance.

**LOCATION** Chesapeake A & B  
**SPEAKER** Kivi Leroux Miller, Founder and Chief Executive Officer, Nonprofit Marketing Guide

2:00-2:45PM

## New Ideas to Help Break Through the Crowded Space of Jewish Engagement

Federations operate in a crowded space and breaking through the digital noise can be a challenge. In this session, learn how to use Facebook Live and other simple, innovative engagement strategies to reach new audiences.

**LOCATION** Chesapeake A & B  
**SPEAKERS** Kristen Grimm, President, Spitfire Strategies  
Chad Sisneros, Managing Director, The Humane Society of the United States

2:45-3:45PM

## Case Study: What Polling Reveals About the Differing Generational Values and Attitudes of Jews in America

A leading market research and polling firm that has worked for numerous Jewish organizations, including the ADL and the Jewish Agency for Israel, shares their most recent findings.

**LOCATION** Chesapeake A & B  
**SPEAKER** Mitch Markel, Partner, Benson Strategy Group

4:00-5:30PM

## Federations and Crisis Communications

We know that a community crisis can come in many forms—with issues spanning from reputation management to navigating an external disaster. Hear from two marketing directors who have weathered these storms recently and learn about the resources available to you from JFNA and the Secure Community Network. Then engage in a discussion on how to prepare your community for the unimaginable.

**LOCATION** Chesapeake A & B  
**SPEAKERS** Kerry Philp, Strategic Director, Marketing and Communications, Jewish Community Federation of San Francisco, Peninsula, Marin and Sonoma Counties  
Adam Hertzman, Chief Marketing/Communications Officer, Jewish Federation of Greater Pittsburgh  
Renee Rothstein, Senior Vice President, Strategic Marketing and Communications, JFNA

# NOTES

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The Jewish Federations  
OF NORTH AMERICA