



COURSE DESCRIPTIONS

(ALPHA ORDER, BY PROGRAM SCHEDULE)

MONDAY, AUGUST 10 6:30PM – 8:00PM

NEW FEDERATION PROFESSIONALS PROGRAM – FEDERATION 101

This important hands-on course provides an essential foundation for new professionals. Learn what Federations do and how, and the history of our Federation movement. Federation 101 will motivate, educate and inspire newer Federation professionals to understand the basics of their jobs, their Federations and their communities.

Who Should Attend? Newer professionals with fewer than three years of Federation experience.

Course Objectives:

- Gain knowledge about the purpose of the Jewish Federation movement and how we accomplish it
- Learn practical tools and techniques for working in a Federation
- Learn history of Jewish Federation
- Gain knowledge about our domestic and overseas partners

Faculty: Debra Stein, *Senior Director, Consulting and Community Development, JFNA*

OPENING PROGRAM – 8:00PM – 9:30PM

STORYTELLING FOR SUCCESS

Join us as we open our I-LEAD program with an interactive and social program facilitated by Deborah Grayson Riegel.

Stories are a rich part of our Jewish tradition – personally and organizationally – and are an adaptable, universal, and economical resource. Our stories support fundraising, marketing, branding and community building. And when it comes to finding deep, powerful, mission-driven stories, Jewish Federations have the corporate world beat! In this engaging, energetic and interactive session, you'll learn what questions to ask to help you decide what story to tell when and to whom, how to articulate what your Federation does that's so unique or special, and how to deliver a story the way that Pixar (*Finding Nemo, The Incredibles, Cars*) does. Come prepared to learn from and share with your colleagues.

Who Should Attend? All I-LEAD participants

Course Objectives:

- Learn about effective storytelling as a tool for Federation work
- Meet and connect with fellow I-LEAD participants

Faculty: Deborah Grayson Riegel, *Head Coach, MyJewishCoach*

CAMPAIGN 101: NEW DEVELOPMENT PROFESSIONALS INTENSIVE (Part 1 of 2)

**This is part of a 2-part series. Participants must register for BOTH parts of the series*

Most of us are expected to hit the ground running. This session will provide new development professionals with the opportunity to learn and gain critical tools you will need to achieve campaign success, and will provide ample time to ask questions. In this course, participants will explore core principals, practices and skills needed to execute the Federation annual campaign.

Who Should Attend? New campaign professionals with one or two years of experience

Course Objectives:

- Provide tangible skills to newer campaign professionals
- Learn how to build relationships with lay leadership
- Gain fundamental solicitation skills

Faculty: Mariam Shpeen Feist, *Chief Development Officer, Jewish Federation of Greater Dallas*
(additional faculty TBA)

CONSTRUCTIVE CANDOR: A FRAMEWORK FOR EFFECTIVE COMMUNICATION

Conflict is a part of organizational life. Learn how to have challenging (but potentially powerful) conversations in a productive way using the Constructive Candor framework. Participants will have the opportunity to apply the framework to a real-time challenge they are facing.

Who Should Attend? Open to all I-LEAD participants

Course Objectives:

- Learn about the Constructive Candor framework as a tool for having challenging conversations
- Gain new tools for effective communication

Faculty: Drew Kugler, *Founder, The Kugler Company*

CREATING A PLANNING PROFESSIONAL'S TOOLKIT: SKILLS & PERSPECTIVES (Part 1 of 2)

**This is part of a 2-part series. Participants must register for BOTH parts of the series*

This highly interactive session will help you gain the skills and perspectives that contribute to being a successful planning professional. You will learn how to identify and implement vital strategies and partnerships. Topics will include: the role of Federation Planners in a world of constant change, a dive into the Federation Allocations model, building strong volunteer/professional relationships, managing conflict, working in partnership with your colleagues, Federation/Agency relationships, and more.

Who Should Attend? Entry to mid-level Planning professionals

Course Objectives:

- Provide tangible skills for Planning professionals' success
- Learn how to build key communal relationships
- Gain fundamental knowledge and strategies vital for your success as a Planner

Faculty: Amanda Abrams, *Vice President of Community Impact, Jewish Federation of Greater Atlanta*
Dale Glasser, *Senior Director, Consulting & Community Development, JFNA*

MOVES MANAGEMENT

Relationship building is a vital component of successful fundraising – so what are the steps you take to build a relationship and bring someone on the journey from prospect to donor to bigger donor and maybe even to community leader? How do you set up back office support to ensure success? Explore and learn how to utilize this popular university model with a Jewish Federation perspective.

Who Should Attend? Open to campaign professionals with two or more years of experience

Course Objectives:

- Explore prospecting and engagement tactics
- Create a moves management chart to use as a tangible tool when you return home
- Strengthen your solicitation skills
- Build a basic strategy for a successful campaign year

Faculty: Michael Balaban, *Chief Development Officer, Jewish Federation of Greater Atlanta*

NEW ENDOWMENT PROFESSIONALS INSTITUTE (Part 1 of 3)

**This is part of a 3-part series that runs from 8:30am – 5:00pm. Participants must register for ALL THREE parts of the series.*

This three-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 for and laws and policies around planned gifts, to building relationships with donors and meeting their goals, this course will leave professionals ready to execute a planned giving and endowment strategy.

Who Should Attend? Open to all Endowment professionals, professionals involved in Create a Jewish Legacy/Life & Legacy or similar endeavors, and other professionals who want to increase their knowledge of planned giving

Course Objectives:

- Familiarity with the vocabulary and conceptual underpinnings of gift planning and endowments
- Ability to recognize assets and situations that are ripe for planned giving
- Competency in tailoring a gift vehicle to a donor's needs
- Confidence in working with donors, donor prospects and professional advisors

Faculty: Kathryn Miree, *President, Kathryn W. Miree & Associates, Inc.*

SUPERVISOR AS COACH: A SPECIALIZED TRACK AT I-LEAD (Part 1 of 3)

**This is part of a 3-part series that runs from 8:30am – 5:00pm. Participants must register for ALL THREE parts of the series. Supervisor as Coach is a multi-part track with three courses in person at I-LEAD and three webinars to follow in Fall 2015. Separate, pre-registration is required. The fee for Supervisor as Coach is \$150 and includes the full I-LEAD program as well as the continuing education webinars.*

"The door to success is marked 'push' and 'pull'. Wisdom is knowing when to use which one."

YIDDISH PROVERB

SUPERVISOR AS COACH: A SPECIALIZED TRACK AT I-LEAD...continued...

In this blended learning course, you will learn how and when to use coaching skills as part of your supervision toolkit. You will learn when to coach and when not to, understand how a coaching approach benefits you, your direct reports and line staff, how to use coaching skills to manage up, and how to look for coachable moments every day with your teams and colleagues. This is a highly interactive, practical workshop that will build trust, connection and deepen the relationships among the cohort.

Our ten coaching skills (Partnering for Performance, Focusing, Listening to Learn, Being Curious, Tapping into Wisdom, Summoning Strengths, Motivational Goal Setting, Action Planning, Anticipating and Overcoming Obstacles, and Creating Commitment and Accountability) will help you step up your coaching skills as supervisors, as well as be able to use coaching in fundraising, leadership development, personal development and more.

There are no role-plays in this workshop! We will be coaching each other on real-life challenges, dilemmas and opportunities.

- **Live at I-LEAD 2015 – August 11th, 2015**
Spend Tuesday, August 11th in three intensive sessions
- **Webinar 1 – September 17th, 3-4pm ET: Seeking Coachable Moments Every Day**
This webinar will give you an opportunity to reconnect and to reflect on what coaching skills you are using on a more regular basis (and with what impact), review and troubleshoot common coaching challenges, and add new skills to those you have already learned.
- **Webinar 2 – October 19th, 3-4pm ET: Taking Your Coaching Skills to the Next Level**
There are still more skills to learn! This webinar will add to your toolkit of skills, and give you the chance to hear and participate in live coaching for review and feedback.
- **Webinar 3 – November 16th, 3-4pm ET: Everyday Coaching**
This webinar will demonstrate the final skills, and offer a concrete framework for putting coaching conversations into action on a regular basis.

Who Should Attend? Professionals who have at least five years of professional experience and supervisor at least one full-time professional position. *Separate pre-registration required.*

Course Objectives:

- Gain knowledge of coaching skills
- Learn when to apply coaching techniques to supervision of your team
- Deepen your skills as a supervisor

Faculty: Deborah Grayson Riegel, *Head Coach, MyJewishCoach*

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CAMPAIGN 101 – Part 2 of 2

**This is part of a 2-part series THAT RUNS FROM 8:30am – 1:15pm. Participants must register for BOTH parts of the series – See description on [page 2](#)*

COMMUNITY CAMPAIGN: A TARGETED APPROACH TO REACHING DONORS GIVING UNDER \$1,000

The Community Campaign makes up a huge portion of our donor base – let’s give it the attention it deserves! This session covers how to use your data to segment Community Campaign efforts, such as direct mail and telemarketing, to more effectively reach donors under \$1,000 and grow your donor base. We will also examine how to track and measure the performance of different appeals and how to incorporate A/B testing.

Who should attend? Open to all professionals, suggested for campaign professionals with two or more years of experience, database professionals, and marketing and campaign professionals responsible for the low-dollar segment of the campaign

Course Objectives:

- Learn why and how segmentation is important to your campaign
- Understand how to interpret your results
- Develop ability to turn your analysis into stronger fundraising campaigns

Faculty: Lesley Cole, *Community Campaign, Jewish Federation of San Diego County*

CREATING A FEDERATION PRESENCE ON LINKEDIN: TOOLS, RESOURCES & STRATEGIES

LinkedIn is the world's largest professional network with more than 364 million members in over 200 countries and territories. LinkedIn’s mission is to connect the world’s professionals to make them more productive and successful. During this session, spend time with fellow colleagues exploring and discussing what LinkedIn can offer you as a Federation professional. You will learn how to use LinkedIn as a recruiting tool for volunteers and Board members, strategies on how to use the LinkedIn platform for fundraising and business development and best practices in developing a Federation brand, both as an organization and as an individual.

Who Should Attend? Open to all I-LEAD participants

Course Objectives:

- Explore the LinkedIn platform and what it offers both organizations and professionals
- Learn how LinkedIn can be a helpful tool for volunteer recruitment, organizational branding, fundraising and business development
- Gain some best practices that you can take home to your own Federation

Faculty: Carolina Velasco, *Senior Nonprofit Relationship Manager, LinkedIn*

CREATING A PLANNING PROFESSIONAL’S TOOLKIT: STRATEGIES & PARTNERSHIPS (Part 2 of 2)

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TUESDAY, AUGUST 11 COURSE BLOCK 2 **11:00AM – 1:15PM – CONTINUED...**

EFFECTIVE FACILITATION: SETTING YOURSELF UP FOR SUCCESS

This session will look beyond the basic “do’s” and “don’ts” of facilitation training and focus on YOU as the presenter. Your personal preparation is key to your success as a facilitator, and this session will give you the tools you need and an opportunity to practice. Additionally, we will share and discuss the seven distinctive actions attributed to the very best presenters.

Who Should Attend? Open to all I-LEAD participants

Course Objectives:

- Gain knowledge of tools and techniques for more effective facilitation
- Learn how preparation can help improve your facilitation skills

Faculty: Drew Kugler, *Founder, The Kugler Company*

NEW ENDOWMENT PROFESSIONALS INSTITUTE (Part 2 of 3) See description on [page 3](#)

**This is part of a 3-part series that runs from 8:30am – 5:00pm. Participants must register for ALL THREE parts of the series.*

SUPERVISOR AS COACH: A SPECIALIZED TRACK AT I-LEAD (Part 2 of 3) See description on [page 4](#)

**This is part of a 3-part series that runs from 8:30am – 5:00pm. Participants must register for ALL THREE parts of the series. Separate pre-registration required*

TUESDAY, AUGUST 11 COURSE BLOCK 3 **2:45PM – 5:00PM**

BECOME A FUNDRAISING CASANOVA: ADVANCED SOLICITATION SKILLS BOOTCAMP

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.

Who Should Attend? Campaign professionals with more than two years of experience or who have attended the Campaign 101 course at I-LEAD

Course Objectives:

- Strengthen face-to-face solicitation skills
- Build a stronger comfort level with making the ask
- Build rapport with donors
- Learn how to better align donors with Federation’s priorities

Faculty: Jonah Halper, *Managing Director, Altruicity*

DIGITAL DETAILS: MAKING AN IMPACT ONLINE

This session will discuss successful implementation and the creative process behind sophisticated digital marketing strategies including hot topics like cause marketing, search engine optimization (SEO), direct mail, social media, and analytics. This session will break down an extremely effective and almost scientific approach to using your digital content to help measure your impact and build your donor base.

Who Should Attend? Open to all professionals, suggested for marketing and campaign professionals

Course Objectives:

- Gain a new understanding of digital marketing best practices and strategies
- Learn how to maximize digital marketing tools

Faculty: Andy Crestodina, *Strategic Director, Orbit Media Studios*

NEW ENDOWMENT PROFESSIONALS INSTITUTE (Part 3 of 3) See description on [page 3](#)

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SUPERVISOR AS COACH: A SPECIALIZED TRACK AT I-LEAD (Part 3 of 3) See description on [page 4](#)

**This is part of a 3-part series that runs from 8:30am – 5:00pm. Participants must register for ALL THREE parts of the series. Separate pre-registration required*

THERE IS AN “I” IN TEAM: INDIVIDUAL DYNAMICS IN EFFECTIVE TEAMWORK

How can you help your team succeed when you’re not the team leader? This session will explore how individual behavior affects group dynamics and how to maximize your contributions to the benefit of your team.

Who Should Attend? Open to all I-LEAD participants

Course Objectives:

- Learn how to be an effective team member
- Gain knowledge about ways to bring these lessons home

Faculty: Drew Kugler, *Founder, The Kugler Company*

TURNING DATA INTO ACTION

Local Jewish community studies. “The Pew Study.” Research abounds about who makes up our communities and what they care about – what are your Federations doing with it? In this session, we’ll explore you can use data to influence your Federations’ funding and planning decisions.

Who Should Attend? Open to all Planning professionals

Course Objectives:

- Gain understanding of available research
- Learn about what do to with existing data
- Gain ideas about how to use data in your home community

Faculty: Amanda Abrams, *Vice President of Community Impact, Jewish Federation of Greater Atlanta*
Laurence Kotler-Berkowitz, *Senior Director, Research and Analysis, JFNA* ‘

HANDLING DIFFICULT CONVERSATIONS

We've all put off having 'that' conversation as we're worried about the impact on the other person, the relationship or perhaps we like to avoid conflict. Situations tend to get worse rather than better if we don't address them at work.

In this program, you'll learn to:

- Effectively handle difficult conversations using a human relations approach
- Refer to the problem or situation in a professional way to move forward
- Develop the confidence and techniques to address issues as they arise and therefore create a better work environment

INFLUENCING OTHERS TO ACTION

With competing priorities and flat organizational structures, the ability to influence people to action has never been more important. This session will help you build relationships and understand the needs of others, gain cooperation, and inspire people as an influential communicator.

In this program, you'll learn to:

- Give feedback to motivate and engage
- Understand our own communication / influencing style and how to play to it

STEP UP TO LEADERSHIP

You were part of the team and now you have to lead it. How do you get the balance right of establishing yourself as a leader and maintaining those important relationships.

In this program, you will:

- Understand leadership and management drivers and how to be seen as a leader
- Feel comfortable with this level of responsibility / accountability that comes as a leader
- Learn what motivates others to action
- Create a personal vision as a leader and manager

CAMPAIGN FOR NON-CAMPAIGN PROFESSIONALS

Whether you work in development or not, all Federation professionals are fundraisers. Working for Federation, each of us works with donors and is representative of the cause. Learn to make the most of your personal and professional relationships and put your campaign hat on from time to time over the course of the year. Learn the basics of making an ask, whether it's at Super Sunday, over the phone or face to face with your leadership.

Who Should Attend? Open to any professional who works in a department outside of development – recommended for Planners

CAMPAIGN FOR NON-CAMPAIGN PROFESSIONALS – continued...

Course Objectives:

- Explore telling the story of federation and learn to share your personal story
- Practice basic solicitations
- Gain understanding of how to best use federation language
- Become more comfortable speaking to donors about their gifts to federation

Faculty: Debra Stein, *Senior Director, Consulting and Community Development, JFNA*

ISRAEL AND OVERSEAS IN YOUR FEDERATION TOOLBOX

Supporting, visiting, advocating for and building connections with Israel and Jewish communities overseas are vital components of the work we do as a Federation system. This session will explore our relationships with our overseas partners (the Jewish Agency for Israel and the American Jewish Joint Distribution Committee) and topics relevant to the Israel and Overseas agenda. Learn how to leverage this exciting work as part of your Federation toolbox!

Who Should Attend? Open to all professionals

Course Objectives:

- Gain knowledge about topics relevant to Federation and the Israel and Overseas agenda
- Gain exposure to Israel and Overseas partner agencies
- Learn how to message the work of The Jewish Agency and JDC funded by annual campaigns

Faculty: TBA

MANAGING YOUR CAREER

There are many facets to successfully climbing the ladder of your Federation career. You should constantly take stock of yourself; understand your values and transferrable skills in order to grow your career. Learn how to leverage your resources, position yourself, and sell yourself to have the career you want. No one can manage your career better than you. But it doesn't happen by itself. Take the reins and empower yourself to be the best professional you can be.

Who Should Attend? Open to all professionals – recommended for entry- to mid-level professionals interested in learning how to grow and manage their long term careers

Course Objectives: Learn how to manage yourself and leverage your resources to develop and grow your career

Faculty: Carin Maher, *Talent Acquisition Executive, Mandel Center for Leadership Excellence, JFNA*

OVERCOMING OBSTACLES TO IMPROVE TIME MANAGEMENT

Time Management enables participants to better prioritize their work, balance daily work with special projects, and handle urgent situations that arise. Participants will learn techniques that will result in greater professional and personal productivity. Topics include a time-management self-assessment, urgent/important matrix, overcoming procrastination and proven tips to maximize productivity.

OVERCOMING OBSTACLES TO IMPROVE TIME MANAGEMENT- continued...

Who Should Attend? Open to all professionals. This course is for anyone who wants to be proactive about finding more time in their day and who wants to have a better understanding of how to manage their time effectively

Course Objectives:

- Leave with helpful tips and tools for managing time
- Learn techniques that will result in greater professional and personal productivity

Faculty: Elissa Maier, *Vice President, Mandel Center for Leadership Excellence, JFNA*

PLANNED GIVING AND ENDOWMENTS FOR NON-ENDOWMENT PROFESSIONALS

In this one-hour course, learn the essential vocabulary and fundamental concepts of planned giving. Sow the seeds for a planned giving conversation and read the signs that a donor is ready. While you will not emerge an expert in planned giving, you will see how easy it is to broach the subject and open the door for an expert to step in.

Who Should Attend? Open to any non-endowment professional – recommended for newer campaign professionals and marketing professionals responsible for planned giving and endowment materials

Course Objectives:

- Demystify planned giving and endowments
- Equip students to recognize situations that make a donor ripe for a planned giving conversation
- Give students confidence that they can speak intelligently about planned giving

Faculty: Itai D. Tsur, JD, MBA, *Senior Endowment Counsel, Jewish Federation of Greater Atlanta*

PROFESSIONAL JUDAISM 101

Let’s talk about the “Jewish” in “Jewish Federation” – what are the laws of *kashrut*, and why are they important when catering a meeting? How can you best communicate with a donor who observes Shabbat? This session will explore Jewish topics most relevant for professional life in a Federation.

Who Should Attend? Open to all professionals

Course Objectives:

- Learn about Jewish laws and principles
- Gain understanding of how they impact our work

Faculty: TBA

