

# JFNA PROFESSIONAL INSTITUTE

March 6-8, 2017



## PLANNING

### Monday 3/6

2:00-5:00PM

#### OPENING PROGRAM

We'll kick this off with welcoming remarks from Jerry Silverman, President & CEO of JFNA.

After that, we'll take part in an interactive session about how to make our Federations the best place to work, lead & give by using the Appreciative Inquiry Model, developed at The Weatherhead School of management. Deborah Grayson Riegel will be leading this session designed to help us address to some of the specific challenges that we as Federations face.

5:15-6:30PM

#### SOCIAL POLICY IN THE NEW POLITICAL ENVIRONMENT

William Daroff of JFNA's Washington Office will examine the risks and opportunities facing the Jewish Federation system around its public policy priorities in the context of the new US administration and Congress.

6:45-8:15PM

#### PLANNING PROGRAMS: PICK ONE

##### • **Networking Block**

Small group table discussions on Current State of JCCs; Federation-Hillel Relations; Federations as Service Delivery Organizations; The Life of the Part-Time Planner; Allocations Models with **Mark Gurvis**

##### • **Introduction to Planning** with Alisa Kurshan (Part 1)

What is planning? What does a planner need to know and do in order to succeed in fashioning a community plan for the future? This session will explore planning as a discipline and offer tools to succeed in your work as a Federation planner. Topics to be discussed will include how to: develop a vision with community buy-in, engage in priority setting, conduct a needs assessment, manage multiple stakeholders- including agencies, sharpen project management skills to help you in your work. (Note: this two-session program will be offered two times over the course of the conference).

Take part in the premier forum dedicated to your growth, as a Federation professional.

Hear from leading experts on the topics most relevant to your work.

Collaborate with the most senior professionals from Federations across the continent.

Receive the opportunity to delve deeper into your area of endeavor.

And even more importantly—in today's cross-disciplinary environment—the opportunity to engage in cross-communications.

7:15-7:45AM BREAKFAST

7:45-9:00AM PLANNING PROGRAMS: BRING YOUR BREAKFAST

- **Large City Planning Directors' Meeting**
- **Difficult Conversations**

Skill building session with Deborah Grayson Riegel on navigating the ever-challenging dynamics of the relationship between the Federation and agencies and other organizations that they fund and/or work with.

9:15-10:45AM PLANNING PROGRAMS: PICK ONE

- **Design Thinking** with Linda Gerard (Part 1)

This hands-on, experiential workshop introduces participants to the power of Design Thinking, a leading innovation tool developed by the d. School at Stanford, and widely used in business and the social sector.

Design Thinking is a human-centered process that ignites creativity, rapid results, and positive organizational culture. In this session, participants will use Design Thinking to create innovative solutions to real-world challenges and take home a tangible tool for creative problem solving in their work and lives. (led by Linda Gerard, Chief Program & Innovation Officer, UpStart)

- **Fantastic \*\$#@-Ups** with David Rubovits

We've all had it – huge missteps or great plans run awry. One of the common critiques of the Federation system is that we are failure-averse because of fear of risking our funding base. But our best learnings can come from failure. A few colleagues will be sharing some of their biggest planning failures and most importantly, what they and their Federations learned from the experience.

- **Introduction to Planning** with Alisa Kurshan (Part 2)

See Monday at 6:45 PM

11:00-12:30PM PLANNING PROGRAMS: PICK ONE

- **Design Thinking** with Linda Gerard (Part 2)

See Tuesday at 9:15 AM

- **Building a Data Informed Culture** with Rella Kaplowitz

Grounding organizational decision-making in data means changes to systems and work flows, to individual mindsets and organizational cultures. Hands-on workshop to learn about how to shift to a data-driven planning culture based on Rella's work in developing The Schusterman Foundation's Data Playbook.

- **Introduction to Planning** with Alisa Kurshan (Part 1)

See Monday at 6:45 PM

12:45-2:15PM LUNCH & PROGRAM

What happens in the White House on moving day? Well, you can watch that on TV. But how does the relationship with the Jewish community get forged and managed by a new administration? Veterans of the Obama and Bush administrations who served as liaisons to the Jewish community give us an insider's perspective.

We'll also get an exclusive update from our overseas partners.

2:30-4:00PM INTERDISCIPLINARY SESSIONS: PICK ONE

In today's world no project relies solely on one area of expertise. Interdisciplinary skills are a prerequisite.

In these interactive sessions, we use case studies and exercises to dive deeper into the work we do.

- **Seize the Day!**: How to better leverage Super Sunday and #GivingTuesday
- **Supplemental Giving**: Seizing the power of creative partnership
- **Gen WHAT?**: Learn about each generation and how to better engage with all of them
- **No Change No Growth**: An introduction to design thinking
- **Civil Discourse and Other Tools**: Navigating in a highly polarized environment
- **The Power of Data**: Use it to make better informed decisions
- **Federations' Global Footprint**: I&O and the Annual Campaign

- 4:15-5:45PM**      **INTERDISCIPLINARY SESSIONS: PICK ONE**
- **Donor Recognition:** Reimagining how we show donors our appreciation
  - **Success without Tsuris:** Learn to maneuver your way through difficult conversations
  - **Shortening the Campaign:** How to do it & its implications for all disciplines
  - **Creative Collaboration:** Fostering a culture of innovation
  - **Implications & Possibilities:** Federations and the Engagement Agenda
  - **Rev Up Your Engines:** Re-engineering the theory and execution of events
- 6:00PM**            **PLANNER'S NIGHT OUT**

## Wednesday 3/8

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**7:15-8:00AM**      **BREAKFAST**

**8:00-9:30AM**      **PLANNING PROGRAMS: PICK ONE**

- **It Will Touch Us All** with Erika Rudin-Luria & Shelley Fishbach

The Cleveland Federation has just completed a ground-breaking study on Alzheimer's and other dementia related diseases and how the Jewish community needs to dramatically reshape its approach to supporting and serving the large number of community members who will be affected directly or indirectly.

- **Introduction to Planning** with Alisa Kurshan (Part 2)

See Monday at 6:45 PM

- **Federations Role in Affecting the Classroom Experience** facilitated by Robert Sherman & Harlene Appelman

A majority of North American Jews will encounter Jewish early childhood education and/or congregational education in their lifetimes. Many Federations are investing lightly at best in supporting these educational programs. What is the opportunity to really make a difference here? (Session will feature a panel of educational leaders steeped in the congregational and early childhood education worlds).

**9:45-10:30AM**      **PLANNER'S BUSINESS MEETING**

**10:45-12:45PM**      **MORE THAN MANAGING: THE RELENTLESS PURSUIT OF EFFECTIVE JEWISH LEADERSHIP**

In this interactive session facilitated by Rabbi Elka Abrahamson from The Wexner Foundation, we'll explore how current leadership philosophies and timeless Jewish thought can be integrated to inform our work. We'll learn about the key distinctions between managing and leading and why those distinctions actually matter.

The next part of the program will be about the challenge of the Boycott, Divestment and Sanctions (BDS) Movement in venues from college campuses to corporate boardrooms. That's why Federation has the Israel Action Network. Executive Director Ethan Felson will discuss the challenges ahead.

**12:45-2:00PM**      **LUNCH & CLOSING PROGRAM**