



An Initiative of the
Jewish Community Foundation

FUNDRAISING ACADEMY 2011-2012

WORKSHOP: From Panic to Praise – The Fear of Asking for Legacy and Endowment Gifts

Wednesday, September 21, 2011

12:00 – 1:30 p.m.

Recognize board blocks of indifference to legacy cultivation; develop a training plan for committee members to successful legacy solicitation; understand how to create leaders who follow through with legacy stewardship at this session led by **Dionisia “Nisia” Hanson**, Chief Philanthropy Officer at Southcoast Health System, New Bedford, Mass. This powerful presentation focuses on overcoming the fear that prevents solicitors from successful legacy and endowment fundraising.

WORKSHOP: Market Reality – Endowment and Investment Update

Friday, December 9, 2011

12:00 – 2:00 p.m.

A return visit by **Michael A. Miller, CFA** managing director of Colonial Consulting LLC, which advises clients, including many community foundation and nonprofit organizations, on a wide range of issues including spending policies and asset allocations. Learn about common types of community investment and major issues to consider including valuation, liquidity, concentration of risk, and whether to integrate these investments into a diversified investment pool.

WORKSHOP: Ten Tips to Promote Legacies and Bequests

Wednesday, February 15, 2012

8:30 – 10:00 a.m.

Gail Littman, Director of Community Programs at San Diego’s Jewish Community Foundation, and training leader of the national Create a Jewish Legacy movement, returns to update us about best practices in legacy development in Jewish communities across the country.

WORKSHOP: Yes, you CAN ask for big gifts

Wednesday, April 18, 2012

12:00 – 2:00 p.m.

Simone Joyaux is an internationally recognized leader in the philanthropic profession who specializes in fund, board and organizational development. Simone is an acclaimed teacher and keynote speaker who presents top-rated workshops and seminars all over the U.S. and in

Canada. Her book *Strategic Fund Development* has become an industry standard. She will address the group on how to ask for a gift, including a legacy gift.

WORKSHOP: Enhancing the Bottom Line – A Nonprofit’s Fiduciary Responsibility

May , 2012

9:00 – 11:00 a.m.

Tax-exempt attorneys David Hadden and Susan E. Roberts of Robinson and Cole, present on how effective maintenance of a nonprofit’s interest in trust or estates can produce enhanced financial results. They will also discuss a practical approach to achieving those results.

WORKSHOP: Social Media and Philanthropy

Wednesday, June 6, 2012

12:00 – 1:30 p.m.

Fundraising professionals know the value of maintaining top of the mind awareness among donors. We communicate with donors via email, snail mail, annual reports and newsletters. Can social media impact this process? **Carol Buckheit**, President of Nonprofit Media Works, says absolutely “yes.” From sharing information in a timelier manner to reducing labor and expenses, social media is a real gift to nonprofits, if used wisely. Learn from an experienced social media advisor about best practices, mistakes to avoid and making the most of free online resources.