



Training for Nonprofit Leaders:

Jewish Organizations

2022 List of Popular Training Topics

evolvegivinggroup.com



A People-First Approach to Nonprofit Training

We're Evolve Giving Group, where nonprofit leaders come to thrive. Through the right combination of strategy, on-the-ground support, and empathy, we've helped professionals at 300+ nonprofits take the steps to boost their impact while reducing the time and stress spent getting there.

Collaboration is at the core of all we do. Our team rolls up our sleeves and works alongside you from idea to implementation, so that you can advance your mission while reaching your personal potential.

Customized Training Sessions

Evolve Training offers sessions on the most pressing issues facing nonprofits today, with opportunities to tailor each one around your organization's needs. Explore our list to start planning where you and your team can grow next.

Jewish Communal Organizations

With deep roots in the Jewish community, we bring a unique lens from our work with hundreds of synagogues, day schools, camps, and other communal organizations. Learn how your nonprofit can create a culture of philanthropy centered around the concept of tzedakah with support from our team.



Training Topics

For Jewish Organizations

Jewish Philanthropy 101:

Jewish Perspectives on Asking, Giving, and Leading

As organizations evolve, the role of the board changes and different needs emerge regarding member characteristics and skill sets. Learn how to recruit and onboard a powerful team, engage and retain current members, practice good succession planning, set realistic expectations, define lay vs. staff roles, and professionalize your board to achieve maximum success. This is especially critical during a time of extreme uncertainty.

Jewish Philanthropy 201: The Art of Asking

In the array of tools available to fundraisers today, face-to-face solicitations are still the most powerful and are the preferred method for soliciting major gifts from individuals. A personal meeting with someone is an opportunity to build a relationship around the organization's work as well as raise funds, so what interferes with the desire to make this happen? We will cover the four major components of an in-person solicitation, all with a Jewish lens: Preparation/Planning, Scheduling the Appointment, the Solicitation Meeting and Follow up/Stewardship – but will start with the most important challenge – overcoming our own emotional barriers.

Takeaways include:

- A clearly defined path to preparation for the meeting
- A strong understanding of what motivates others to give
- Overcoming our own discomfort around asking
- A mastery of the “asking” process; knowing how to ask for an increase
- Preparation for objections and follow-up
- Using our own giving as a guide for genuine asking

Board Development

Recruiting, Engaging, Retaining, and Training Your Board

As organizations evolve, the role of the board changes and different needs emerge regarding member characteristics and skill sets. Learn how to recruit and onboard a powerful team, engage and retain current members, practice good succession planning, set realistic expectations, define lay vs. staff roles, and professionalize your board to achieve maximum success. This is especially critical during a time of extreme uncertainty.

Healthy Boards and Their Role in Achieving Mission Impact

Identify the four key areas of board engagement: strategic decision-making, fiscal oversight and fundraising, CEO support and evaluation, and relationship building. As we discuss the responsibilities that fall into each category, participants determine the type and size of board necessary to achieve their goals. Groups that have time for an extended working session will explore the talents, skill sets and characteristics of the ideal board recruit and update or complete committee role descriptions, recruitment strategies and work-plans.

Building a Culture of Philanthropy: The Role of the Board in Capacity

Learn how to build a strong culture of philanthropy that values donors, places them at the center of the organization, and builds capacity and systems to support its fundraising success. During this session, we will identify the key characteristics of a strong philanthropic culture, learn how to navigate relationship building, and provide your team with concrete tools and resources. We'll cover what you need to know about identifying the characteristics of a powerful campaign team, training your board and exploring the "AAA" model, one where every Board member is motivated to be an Ambassador, Advocate, and/or Asker.

The Role of the Board in Capacity Building

If all board members must be involved in fundraising, what do we do with board members who won't solicit? And is asking the only way a board member can be engaged? Join us as we explore the "AAA" Board, one where every Board member is motivated to be an Ambassador, Advocate, and/or Asker. This model is built around a premise that confident volunteers are effective volunteers. If you offer board members opportunities to enhance resource development without putting them in dreaded and awkward roles (like asking for money), they respond, become engaged, and deepen their commitment. We'll apply this model to your work and emerge with a plan to engage our boards as effective partners in capacity building.

Creating a Fundraising Plan

All organizations with a fundraising program need a roadmap for success. This hands-on approach guides you through the creation of a plan that includes an annual fundraising budget, timeline, key benchmarks, tactics for cultivating and soliciting key donor constituencies, event goals and a major gifts strategy. This process allows your team to evaluate current tactics and make strategic changes to increase revenue and improve operations. Finally, learn what it takes to work with volunteers and organizational leadership to support the planning process and drive implementation.

The “If” and “How” of Virtual Events

Join Evolve Giving Group’s Vice President and virtual event guru, Lisa Tarshis to discuss the “if” and “how” of virtual events. In this interactive session, we’ll unpack how to determine if you should move forward with a virtual event, how to think about planning and budgeting for the event and some of the many possibilities to make your event feel special or different. We’ll leave time for Q&A so bring your questions!

The Power of Story

Storytelling has often been said to be at the heart of any successful conversation about giving, but how do you harness the power of storytelling to convey your philanthropic messages? Participants will learn to identify the characteristics of a powerful story, create their own stories, and elicit stories from donors and prospects. You’ll not only learn to use stories effectively during donor cultivation, solicitation, and stewardship, but develop a plan to share stories from the field in your work as staff and board teams.

Identifying and Researching Prospects

The best way to explore the donor lifecycle is to define the process by which we identify and build relationships with donors. What does research tell us about the most likely prospects? Where do we find them? What motivates them to give? What are the methods by which we turn prospects into donors? Learn to identify strategic fundraising prospects, mine your current list, assess capacity, and engage with the people who care most about what you do.

Cultivation, Stewardship and Donor Recognition Strategies

We have the list - now what? Explore the next step in the donor lifecycle and define the process by which we build relationships with donors, both before and after a solicitation. We’ll discuss best practices in building relationships with donor prospects, acknowledging and recognizing donors. Take your fundraising skills to the next level by creating customized, individual cultivation, and stewardship calendars for each major donor or prospect.

Asking Made Easy: A Hands-On Solicitation Training

Once we have developed a strong relationship, it's time to make the ask. Don't get nervous, get strategic! During this session, explore campaign messaging and collateral, the solicitation "toolbox", motivations for giving, discomforts around solicitation and changing our mindset for greater results. We then move to the mechanics of the ask, including appointment making, determining the ask amount, asking for the gift, the value of face-to-face solicitation, common put-offs, and meeting follow-up. We conclude with role-plays and feedback for maximum training impact.

Engaging Donors in The New Reality

Join Amy Schiffman, President of Evolve Giving Group, as she shares insights into what's working now to keep donors connected to your organization's work. She will offer simple steps to help define goals, nurture supporters and boost giving. Leave with a plan to stay in touch, tailor messages to inspire greater giving, and create engaging virtual opportunities to share your mission with stakeholders and community members.

From Mid-Level to Major:

Launching and Implementing a Major Donor Program

A strategic mid-level donor program may be the key to growing your campaign -- but how do you get there during a global pandemic? We'll discuss this small but mighty, and frequently overlooked, donor segment. Learn how to engage and strengthen the commitment of this loyal base (75% of mid-level donors give year after year) as we share tips for crafting and executing a major gifts strategy for 2022. Leave with a plan to elevate the mid-tier and deepen relationships with current major donors.

Organizational Development

The Essence of Time Management

Those who cannot manage their time effectively have a hard time managing anything else. Yet, most people waste precious minutes, hours, even days, reacting to what is going on around them rather than developing skills that keep them moving forward and accomplishing their most important goals. Master your work/life balance by understanding where your time is going, minimizing interruptions, and delegating low-priority tasks. Learn how to recognize and protect your high-value tasks to ensure they are done well and on time. Best of all, learn how to get the most out of your work life so that you're able to enjoy the time you spend away from your desk.

Special Campaigns

Launching Your Planned Giving or Endowment Effort: What Does it Take and Are you Ready?

Is your organization ready to add legacy and endowment to its fundraising program? Feeling like you have already bitten off more than you can chew? Come learn why endowment building is a critical component of your strategic development program and discover how to easily integrate it into existing fundraising efforts. Participants will explore legacy/endowment cultivation, solicitation, and stewardship and leave with the concrete tools and resources necessary for reaching your sustainability goals.

The Legacy/Endowment Donor: Prospect Identification, Cultivation, and Stewardship

Explore the donor lifecycle and define the process by which identify legacy prospects and build relationships with donors, both before and after a solicitation. We'll discuss best practices in thanking, acknowledging, and recognizing donors and create customized, individual cultivation and stewardship calendars for each of your legacy prospects.

Managing Concurrent Campaigns: The Challenges and Opportunities

If your organization is engaged in more than one major fundraising effort (annual, capital and planned giving or endowment), the difference between success and failure hinges on your leadership's ability to create comprehensive giving opportunities. Learn to demonstrate the value of each effort and make a compelling integrated solicitation. Explore an approach that places the donor at the center of your work and treats them like true partners in the pursuit of your mission and vision. In real time, create a plan that educates donors, achieves capacity giving, creates an opportunity to tell a comprehensive story, and leaves your supporters feeling more vested than ever.



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Training

Your expertise,
elevated.

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