

## Mosdos Around the World Benefit From Fundraising Seminar

BY YONOSON KLEIN

Sound advice is not always easy to come by — but it was available in abundance at the fundraising seminar “Raising the Bar” held last week at Tarrytown’s DoubleTree Hotel, near the majestic banks of the Hudson River in suburban Westchester County.

The two-day conference was proof positive of the high level of professionalism and cutting-edge presentation techniques that our *mosdos* — and the donors who support them — have come to expect.

“It was a tremendous learning tool,” said Rabbi Moshe Dear, executive director of Monsey’s Ateres Bais Yaakov. “I’ve gained such a wealth of information that I need a few days just to digest it and figure out how to implement the ideas.”

Rabbi Dear only had a short journey from Monsey to Tarrytown, but others among the 140 participants, who represented all walks of Torah Judaism, came from more than a dozen states and two Canadian provinces. Some even crossed the Atlantic, including Ukraine’s Chief Rabbi Yaakov Bleich, and fundraisers and organization heads from Eretz Yisrael and Belgium, giving the conference an international flavor. The ideas they gleaned were both well-grounded and creative.

“All of the lectures were truly amazing. As I am just starting out in fundraising, this was a true source of encouragement and help. I sincerely appreciate what you have done for me and for *Klal Yisrael*,” said Reb Dovid Weiss.

### Trade Secrets Aplenty

None of the presenters held back. Some of *Klal Yisrael’s* leading strategists shared trade secrets and everyone left wiser, more empowered and greatly enriched. Following the opening luncheon (all meals were catered by the incomparable L’Chaim Caterers), Rabbi Herschel Leiner gave an address called “Fundraising Survival During Hard Times and Practical Strategies for Recovery” — a topic that was on all the participants’ minds.

Rabbi Leiner, president of H. Leiner & Co., has raised more than \$100 million for *mosdos* in the past 10 years. His session, which drew on his extensive experience in fundraising, reviewed three different approaches to this task — defensive, aggressive and selective. He explained the drawbacks of each approach, encouraging and providing tips on the selective approach. Rabbi Leiner spent time explaining the concept of donor segmentation and how to categorize donors based on the frequency with which they donate, their level of donation, and other factors, in order to better understand how to approach them in the future.

Yitzchok Saftlas, president of Bottom Line Marketing Group, followed with a talk on marketing via social networks and the latest technologies. This topic presented specific challenges, which Mr. Saftlas overcame deftly after consultation with *daas Torah* and feedback from



Rabbi Herschel Leiner, president of H. Leiner & Co., addressing the seminar participants.

fundraisers represented in the room. He displayed his grasp of other new technologies with significant marketing potential, including the emerging technology of QR (quick response) codes. For example, QR codes included in a newsletter can be scanned by the reader’s Smartphone, instantly linking him to online sources of information about the organization.

The session was aided by a PowerPoint presentation and handouts to assist the participants in retaining the information.

### “Friendraising,” Not Fundraising

After *Minchah*, Rabbi Yonason Sanders, dean of Lakewood’s Bais Tova, presented “Building Bridges:

the Myers-Briggs Type Indicator (MBTI) inventory, which provides a detailed analysis of personality types and what the results mean for communication, decision-making and relationships. Among other examples, Mr. Engel explained that people are either introverts or extroverts. Every donor has a way in which he prefers to partner with an organization. Understanding a donor’s personality will greatly aid a fundraiser and is indispensable to success.

After *Maariv*, participants reorganized into breakout sessions. The floor was thrown open for questions and answers; attendees showed the expert panelists work samples for critique and received valuable individual feedback on

heart and sweaty palms. When that happens, instead of making the call, he may allow himself to get sidetracked by tasks of lesser importance. Mr. Grimes said that a fundraiser must crush his fear by setting and achieving goals.

The conference was then treated to *divrei chizuk* given by Harav Moshe Tuvia Lief, Rav of Agudas Yisrael Bais Binyomin in Flatbush. In his inspiring address, Rav Lief pointed out that each of the approximately 140 participants at the conference represented a *mossad* or organization that serves over 100,000 people — all of whom would benefit from the ideas, techniques and positive influence at the gathering.

### Creative Strategies

At a luncheon appearance, Jonathan Gassman, director of Wealth Management at Gassman & Golodny, LLP, provided positive reinforcement in his address “Planned Giving Today,” a topic that is just one of his many areas of expertise. Mr. Gassman told the audience that not long after he presented on this topic at last year’s seminar, he received a call from a fundraiser who informed him that by following his advice, he had landed a \$40,000 gift.

Following lunch, Yitzchok Saftlas gave a comprehensive session on milestone campaigns, titled, “Anniversary Campaigns: How to Achieve Fundraising Milestones from Your Milestone Events.” He noted the importance of thinking out of the box in developing anniversary and milestone campaigns in order to excite donors and get them more involved in an organization’s cause.

“You don’t need to be celebrating your twenty-fifth anniversary. Marking the one-thousandth *bachur* graduating from your *yeshiva* or the tenth *masechta* you have been *mesayem* is also cause for special celebration,” he said.

He also stressed that the excitement of any campaign must be generated from within. Only then will donors, parents, alumni and others get involved.

The closing keynote presentation was a two-part session given by Rabbi Leiner. It was based on the theme of the conference, “Raising the Bar.” Part A was called “Going From ‘Good’ to ‘Great’ for Dinners, Direct Mail and Special Projects,” and Part B was called “Raising the



Rabbi Yonason Sanders of Bais Tova

Bar on Office and Nonprofit Management.”

To help attendees understand how to keep records that can propel their performance, Rabbi Leiner provided the audience with a handout. Among the wealth of valuable guidance he offered was a concept he developed called the “DPP Shot” — an acronym for “donors, past/pending donors, and potential donors.” Another concept he explained with a user-friendly grid was how to track and project goals based on past solicitation history.

Since a donor’s first interaction with an organization usually comes through the receptionist or secretary, Rabbi Leiner stressed the importance of the staff projecting a warm, friendly image. “A sincere ‘please’ and a ‘thank-you’ will go a long way. Genuine kindness is something that donors can even feel over the phone.”

As the conference ended, many shared their personal feelings of gratitude to Rabbi Leiner and Mr. Saftlas for producing such a remarkable event. Among the comments was one from Rabbi Aron Hersh Freund, the lead fundraiser of Satmar’s United Talmudical Academy, which represents over eight thousand.

“It would take too much time to express all of my feelings about this special event,” noted Rabbi Freund, “but for now the best way I can describe it is to say that you have a big *zechus* for bringing together all those who promote Torah, *avodah* and *gemilus chassadim*. In doing so, you are helping maintain the world, as the *Mishnah* in *Avos* states: ‘The world exists on the pillars of Torah, *avodah* and *gemilus chassadim*.’”

The sense of camaraderie, energy and *chizuk* that pervaded these two days of intense skill-building, networking and targeted sessions on diverse fundraising topics affected not only the participants but the presenters as well. Both Rabbi Herschel Leiner and Yitzchok Saftlas expressed their appreciation and the deep sense of unity they shared with dedicated professionals in the critical field of fundraising. In addition, they were grateful to have provided all the participants with new opportunities and the ability to better face fundraising challenges back home in their communities, *mosdos* and organizations with vigor, excitement and respect.



Harav Moshe Tuvia Lief, Rav of Agudas Yisrael Bais Binyomin in Flatbush

Cultivating Relationships with Donors Who Are Not Connected with Your Organization.” Rabbi Sanders kept the audience riveted with a fascinating mix of personal anecdotes, advice and relevant citations from *Chazal* to reinforce his approach to navigating donor relationships and demonstrating genuine *hakaras hatov*.

“I like to refer to what we do as ‘friendraising,’ not fundraising,” said Rabbi Sanders. His family will attest to his *mesirus nefesh* in maintaining this principle, such as the way he trudges through snow on a frigid Shabbos to give a heartfelt *mazel tov* at a *kiddush*, or knocks on a donor’s door just before Shabbos to present a *shalom zachar* gift.

Following a networking dinner, Yakov Engel, CEO of Yeda LLC, opened the evening session with a talk called “How to Detect and Connect with Your Donor’s Personality.” Mr. Engel is certified in

how to overcome stumbling blocks and move forward on new projects.

### Keeping Fear at Bay

The next morning’s session got off to a good start with *Shacharis* and a sumptuous breakfast, but the “main course” came afterward — courtesy of Bill Grimes, CEO of Bill Grimes and Associates, Inc., an award-winning Oklahoma City consulting and training firm for many top U.S. financial services institutions.

Mr. Grimes’s session titled, “Breaking the Barriers to Productivity,” showed how an individual’s productivity increases when he understands how to build up a person’s inner belief systems. He stressed that fear, which often holds us back, is an acronym for “false evidence appearing real.”

It is that fear that accounts for “call reluctance,” when a fundraiser experiences butterflies, a pounding