

When the Going Gets Tough, the Tough Get Creative

An Inspiring Fundraising Seminar With New Directions

By Jeff Deutsch

All of us are feeling the effects of the recession, perhaps none more than the valiant men and women who shoulder the responsibility of raising the funds so crucial to the survival of our yeshivos, *mosdos* and community organizations. Success in finding donors is no longer simply a matter of knocking on doors or using other fundraising techniques of the past. The depressed economy and increasing competition for funds means that fundraising professionals' skills must be highly developed and squarely located on the cutting edge.

On February 17-18, nearly 120 fundraisers, representing as many organizations and close to half a billion dollars in funding, came together to hone their skills at "Raising Donors and Donations," a seminar co-sponsored by H. Leiner & Co. and Bottom Line Marketing Group. Held in the beautiful DoubleTree Hotel in Tarrytown, N.Y., and sumptuously catered by L'Chaim Catering, the program featured eight lectures on different approaches to fundraising, in addition to a roundtable discussion and plentiful opportunities to network.

Sessions were led by a panel of experts, including the event's organizers, Rabbi Herschel Leiner, president of H. Leiner & Co., and Mr. Yitzchok Saftlas, president of Bottom Line Marketing Group. Also presenting were Mr. Jonathan Gassman, CAP, CFP, CPA, of Gassman and Golodny Planning Concepts, Inc., and Mr. Howard Tzvi Friedman, founding partner of Lanx Management, LLC, and chairman of the Board of AIPAC.

Also participating were Rabbi Pinchos Lipschutz, publisher and editor of *Yated Ne'eman*; Rabbi Mordechai Kamenetsky, *Rosh Yeshiva* of Yeshiva Toras Chaim at South Shore; Rabbi Aron Hersh Freund, executive director of UTA of Satmar; and Rabbi Yaakov Shlomo Rothberg,

executive director of Yeshiva Ohr Hameir of Peekskill.

Seminar attendees came from locations as diverse as Los Angeles, Ottawa, Montreal, Chicago and Boston, and even Eretz Yisrael, and from every point on the Orthodox spectrum. Rabbi Yossi Mentz of Yeshivat Yavneh in Los Angeles said, "It was so uplifting to see the camaraderie from this cross-section of Orthodox Jewry; the *achdus* resonated throughout the event. These devoted men and women gathered together with the lofty goal of guaranteeing the financial stability of our *mosdos*, and that in itself is *melechtes hakodesh*."

Rav Baruch Yehuda Gradon, *Rosh Kollel* of Kollel Merkaz HaTorah, flew in from Los Angeles to address the crowd, commencing the program with inspiring *divrei chizuk*. Rav Gradon stated that the hard, often thankless work of fundraising is a holy and essential task, and emphasized that every fundraiser should do his best to embody the high moral principles represented by his institution.

Rabbi Herschel Leiner, who has been in the field for over 25 years and has raised over \$100 million in the past 10 years for various organizations, was the seminar's co-organizer and presented on Wednesday. It was he who first had the vision to create conferences to offer assistance and training to fundraisers. His first seminar, entitled "Fundraising I & II: The Anatomy of an Encounter — Opening, Presentation, Negotiating, Closing," stressed that fundraisers need professional-level skills.

"Solicitation is a science," he said. "Doing our *hishtadlus* properly in fundraising means learning how to hone our skills in presentation, negotiation and closing the deal." He emphasized the necessity of being well informed not only about one's organization but about the donor.

Rabbi Leiner also presented

"Donor Profiling: It's Legal!" In this session, he spoke about the importance of a donor profile system and about diversifying an organization's donor list. "Those institutions that were only dependent on large donors are struggling today," he said. "But those who acknowledged a broad mix of donors emerged stronger. Building up donors is as important as building up donations." The fundraiser-donor relationship is a personal one, he continued, in which each partner participates in strengthening *Klal Yisrael*.

"Everybody wants to give," declared presenter Jonathan Gassman, a wealth management consultant, in the program's second session, entitled "Where There's a Will, There's a Way." As a fundraiser, you have to be donor-centered. You have to help the donor understand why he wants to give to you... The most important skills are not the technical skills, but the people skills and the communication skills. It goes without saying that if you don't ask for funding, you won't get it. Not only that, if you don't ask for it, rest assured that somebody else will."

Mr. Gassman's specialty is assuring the long-term financial futures of Torah *mosdos* by securing bequests from donors, otherwise known as "planned giving." Even people who are uncertain about their current financial status are often willing to promise a piece of whatever remains after 120 years.

"Many people see planned giving as a way to leave a legacy, to be *mekadesh Shem Shamayim*," said Mr. Gassman. "You have to see your fundraising as a way of helping people realize these goals."

Wednesday evening's session, "Out of Sight, Out of Mind: Tips to Remain on the Radar Screen of Your Donors," presented by seminar co-host Yitzchok Saftlas of Bottom Line Marketing Group, drove home the vital necessity of keeping donors aware of the day-to-day work of our *mosdos* and organizations. Mr. Saftlas provided his listeners with a host of practical examples for how to accomplish this, including newsletters, brochures, advertisements and other types of media, in order to maintain a continual presence in the public awareness. Mr. Saftlas, who began his career at ArtScroll/Mesorah Publications 20 years ago, has produced effective and successful marketing materials for nonprofit, corporate, and political clients.

Advances in computer technology have opened up exponential possibilities for networking with donors and generating money for organizations. The second session by Mr. Saftlas, entitled "Net Gains on the 'Net: Unleashing the Power of Online Fundraising," showed participants how computer-based marketing techniques can be applied to help organizations establish an online presence and reach out to donors via e-mail lists and online campaigns.



Rabbi Herschel Leiner during his presentation on donor profiling.



Mr. Howard Tzvi Friedman networking, following his presentation.

Rabbi Pinchos Lipschutz was the guest speaker at Wednesday night's dinner. He regaled the crowd with tales of the days when he worked as a fundraiser for Torah Umesorah and the Philadelphia Yeshiva. Rabbi Lipschutz shared personal experiences from when he accompanied the Philadelphia *Rosh Yeshiva*, Rav Elya Svei, *zt"l*, on fundraising trips and offered insights into handling the many *nisyonos* of this difficult but vital work.

A particular highlight was the Wednesday-night roundtable session, moderated jointly by Rabbi Freund and Rabbi Rothberg. Titled the "Fundraisers' Roundtable," the session offered an opportunity for fundraisers to put their heads together and brainstorm solutions to tough problems, exchange advice and share their stories of triumphs and setbacks.

The Thursday-morning session, "Stepping Out of Your Fundraising Comfort Zone: How to Develop and Maintain Fundraising Relationships with Federations, Foundations and Jewry at Large," was given by Mr. Howard Tzvi Friedman. Enlivening his presentation with personal anecdotes culled from years of high-level work in the public sector, Mr. Friedman spoke of the importance of building fruitful relationships with large federations and foundations, as well as establishing a base of personal contacts.

During lunch on Thursday, the participants were treated to words of *chizuk* from Rabbi Mordechai Kamenetsky. Coming from the vantage point of a *Rosh Yeshiva* whose father mentored him in fundraising, Rabbi

Kamenetsky stressed the critical role fundraisers play in supporting our *mosdos*. He recounted humorous stories from his personal experiences, as well as memories of learning in the presence of his grandfather, Rav Yaakov Kamenetsky, *zt"l*.

The immeasurable value of the seminar was reflected in the glowing testimonials that Rabbi Leiner and Yitzchok Saftlas received following the two-day conference. "All I can say is that every minute was educational and inspiring," said Reb Tuvye Neuman of the Yeshiva at IDT.

Rabbi Aron Eisenberg of Chesed of New Square commented, "It was an absolute delight, every minute of it."

Rabbi Zev Rivkin of the Passaic Community Kollel noted, "All the presenters were super, very knowledgeable. Thanks for hosting such a wonderful *asifah!*"

Those who missed the fundraising seminar will be delighted to know that, *b'ezras Hashem*, another seminar is planned for this summer. Questions, ideas, and requests for further information may be directed to Rabbi Herschel Leiner at hl@HLeiner.com, or Yitzchok Saftlas at ys@BottomLineMG.com.

The event's organizers are grateful for the tremendous work their attendees are doing for the community. "The *chinuch*, *chessed* and *kiruv* of Jewish North America depend on them," points out Rabbi Leiner. "They're out there working for the betterment of *Klal Yisrael*. We're here to do whatever we can to help them succeed and thrive in the all-important work they do."

We Compete With the Big Boys!

QUILL

OVER 40,000 ITEMS FOR YOUR OFFICE; 1500-PAGE CATALOG:

STAPLES

Corporate Express

Office Supplies Office Furniture Fax Machines Computer Printers Toners Paper Janitorial Supplies

Office DEPOT

OfficeMax

3M

✓ Outstanding Service
✓ Outstanding Prices

GLOBAL

CALL US FOR A FREE CATALOG!

hp

Your LOCAL SOURCE for over 23,000 ITEMS at the RITE PRICE

The Single-Source Advantage
Complete
OFFICE PRODUCTS

790 McDONALD AVENUE • BROOKLYN, N.Y. 11218
FAX: (718) 436-8382 • OUT OF STATE 1-800-786-2867 (718) 436-8220