LIFE & LEGACY Create a Jewish Legacy Leadership Gathering

May 18, 2020



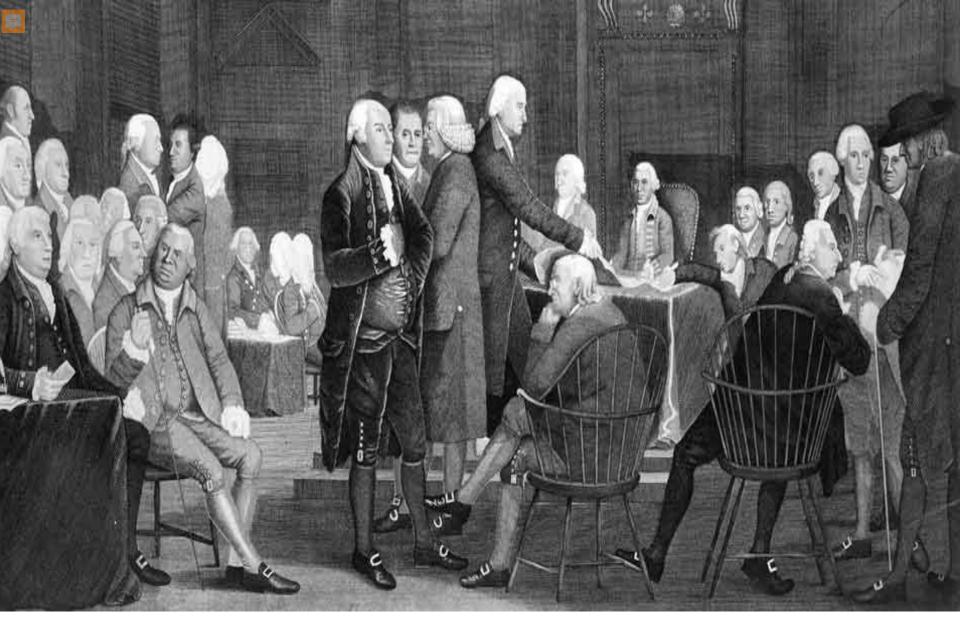
Lynn Malzone Ierardi, JD Director of Gift Planning University of Pennsylvania *and* Gift Planning Advisor giftplanningadvisor.com





Photo by R. Kennedy for Visit Philadelphia





Congress Voting Independence



Today's menu: a quick meal

- Why is storytelling so important?
- How is it relevant to fundraising?
- What are the ingredients of a good story?
- How can you use impact stories more effectively to secure and steward legacy commitments?





Why is storytelling so important?

Stories feel good for the same reason food tastes good – because without it we couldn't survive.

- Lisa Cron, Wired for Story

Those who tell the stories rule the world

- Native American Proverb

Dr. Russell James

• When people were asked why they included gifts in their wills, they talked about their life stories.



- In a range of messages tested to encourage such gifts, stories worked best.
- The best way to speak to a donor is with stories that connect them back to the organization, and deepen their connections.

Tony Malzone



The stories that people share about you are the legacy you leave behind.

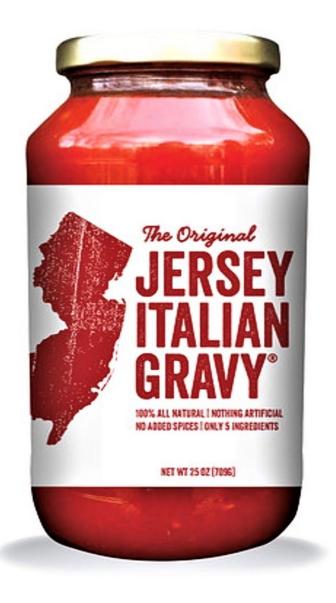
Stories, unlike people, can live forever.

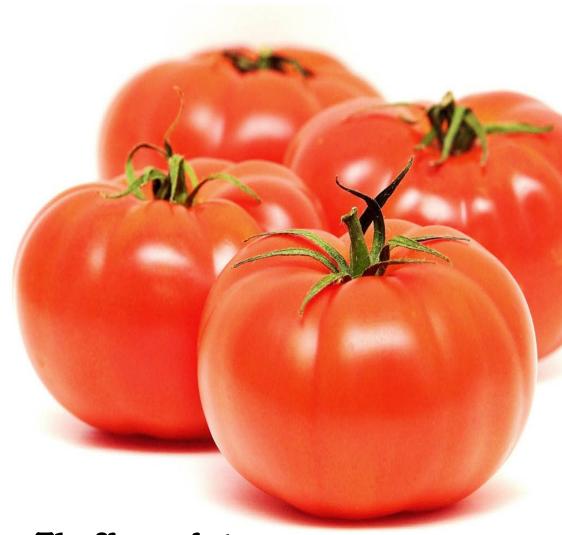
Dr. Paul Zak – aka Dr. Love

The brain responds to a good story by releasing two chemicals:

Cortisol – focuses attention Oxytocin – triggers emotion

Paul's studies show these chemicals influence behavior... including charitable giving





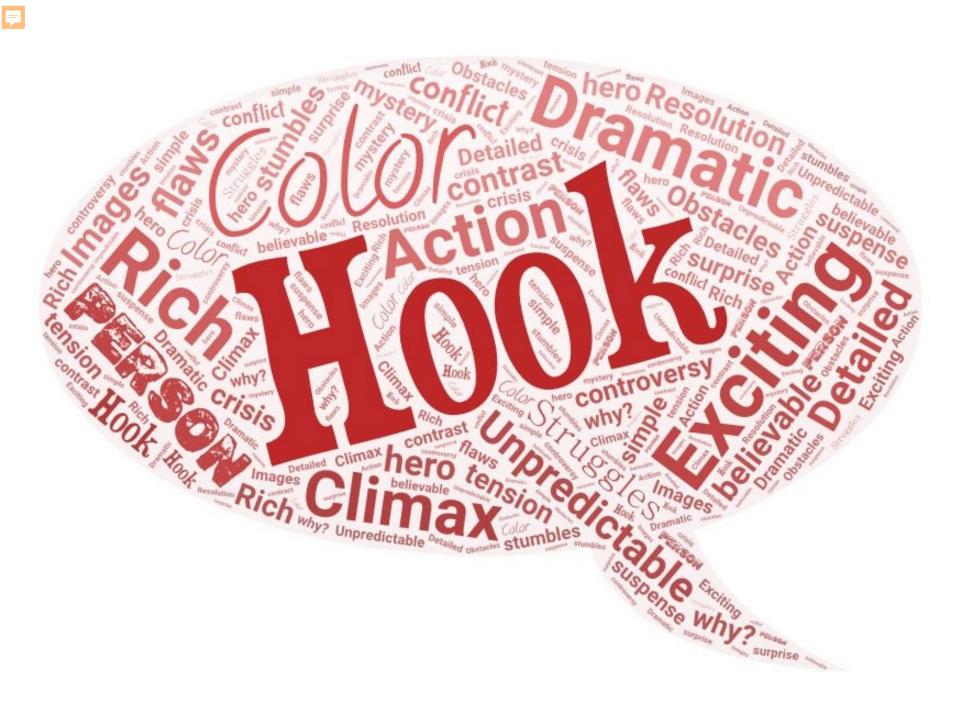
The fine print:

Your experience with stories may vary. Not all stories will require the same ingredients. There is no single story that will satisfy all tastes. Some people prefer more spices. Every storyteller will add their own special ingredients. You should share stories that resonate for your own audience.



Two most important things a story must trigger: Attention and Emotion

What are the ingredients of a good story?







 A hook – to grab attention
 One person, place or thing
 Specific, rich details and when possible, images
 A struggle or hurdle

- 5. Resolution
- 6. A call to action



Story Prompt

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Once upon a time... (set up time & place, introduce main character) He/she usually... (the everyday, normal situation is explored) But then... (the drama begins - with a conflict to resolve) At some point... (the character starts to solve the problem) And then... (but there are obstacles or challenges) Until finally... (the character successfully finds a resolution)

The Main Entrée: your organization's story

- Why/How do you exist?
- What problem are you solving?
- Why should anybody care?
- How can others be part of the solution?

It's NOT about: Look how great we are! So, you should give us money

IMPACT:

Reporting versus Storytelling

- Impact reporting matters more than ever
- Donors demand more information
- Nonprofits must be more transparent
- But data, statistics and financials don't do it especially for legacy gifts!
- Too many annual reports or impact reports FAIL to effectively communicate

The young boy whose parents don't know enough to teach him about Judaism. You helped him celebrate his first Shabbat.

The teenager who just became a bar mitzvah. You ensured his Jewish education isn't over.

The sun-kissed nine year old selecting her bunk at summer camp. You helped her find her best friend.



Because of you,

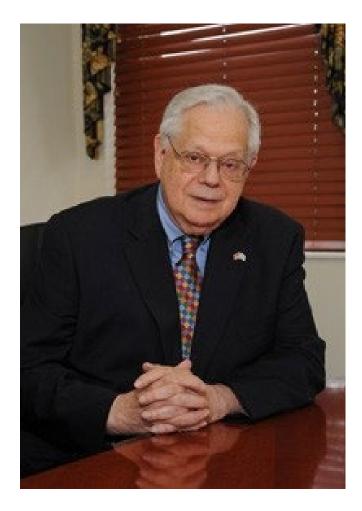
Meyer and Malka are more than surviving.

After surviving the Holocaust having lost his family, Meyer never expected to find warmth and joy again – until the redheaded Malka caught his eye and they fell in love and married.

Their savings diminished as Malka began to lose her eyesight and memory. His greatest fear was that his wife, a concentration camp survivor who became anxious in institutional settings, would have to live out her last years in one. He became overwhelmed with daily life, feeling helpless, alone and without hope.

Their doctor urged Meyer to seek help from Jewish Family Services. Though fearing his wife or his choices would be taken from him, Meyer reached out in desperation – and found a tremendous source of comfort, stability, resources and practical help to enable them to thrive in their own home.

Donor Stories Sanford "Sandy" Hollander



"Jewish responsibility"

"Keeping an eye on the Future"

"Passionate about endowing his gift"



Dessert... 3 quick tips for using storytelling in the work you do:



1. Listen!

Gather stories by shopping in several places and in all the aisles



2. Create a storytelling culture at your organization – make it a team effort





3. Share stories

in a variety of
formats, channels
and places
(serve and reheat)

I'VE LEARNED THAT PEOPLE WILL FORGET WHAT YOU SAID, **PEOPLE WILL FORGET** WHAT YOU DID, BUT **PEOPLE WILL NEVER** FORGET HOW YOU MADE THEM FEEL.

-Maya Angelou

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