

PRESENTER BIO'S

ELANA ARIAN, Composer, Multi-instrumentalist, Prayer leader and Recording artist

Elana Arian is one of the leading voices in contemporary Jewish music. A composer, multi-instrumentalist, prayer leader, and recording artist, she inspires communities of all types with her soulful songwriting and spirit. Her work has been published in many Transcontinental Music collections, and her compositions are sung in synagogues, summer camps, and spiritual communities from Louisville to London, from Chicago to Cape Town, and everywhere in between. She recently released her fourth album of original music, *The Other Side of Fear*. Elana has served on the faculty of both Hava Nashira in Oconomowoc, WI, and Shirei Chagiga in London, and she is an instructor at the Hebrew Union College-Jewish Institute of Religion in New York, working as a teaching artist in the Debbie Friedman School of Sacred Music. She has performed at Carnegie Hall, Lincoln Center, Tanglewood, and perhaps most memorably, five separate appearances at the (Obama) White House. Elana can be contacted at www.elanaarian.com.

BEVERLY BACHRACH, Chief Philanthropy Officer, David Posnack Jewish Community Center

Beverly Bachrach has had a very diverse career in the “world of philanthropy”. She began her “fundraising career” with the Two Ten National Foundation in Boston which assists people employed in the shoe industry. Prior to joining the Posnack JCC, Beverly held the positions of women’s division director and campaign director for the Jewish Federation of South Broward, development director for the Broward Center for the Performing Arts, southeast regional director for American Friends of Hebrew University, and vice president of University Advancement and Marketing & Communications for St Thomas University. Beverly is a “connector” and enjoys bringing people together to build new bridges. Beverly can be reached at bbachrach@dpicc.org.

DIRK BIRD, Vice President, Planned Giving & Endowment, Managing Director, Total FRD, The Jewish Federations of North America (JFNA)

As the former chief development officer of JEWISHcolorado and the former executive director of the Jewish Community Foundation in Denver, Dirk Bird has extensive experience in development planning, lay leadership engagement, major gift development, family philanthropy, gift planning, next generation engagement, professional development, and donor stewardship. He currently serves on the board of directors for the Denver School of the Arts Foundation and is a certified 21/64 trainer with a specific focus in multigenerational family philanthropy. Dirk received his bachelor’s degree in education from the University of Northern Colorado, and his master’s degree in Sports Management from the University of the Pacific. Dirk can be reached at dirk.bird@jewishfederations.org.

DAVID CHAIFETZ, Legacy Team Lead, Temple Beth Sholom

David Chaifetz is the team leader for the legacy team of Temple Beth Sholom in Sarasota-Manatee, FL. He also serves as a member of the board of directors of the Jewish Federation of Sarasota-Manatee, as a member of the national council of AIPAC, co-chair of Sarasota AIPAC, as a member of the board of governors of the American Jewish Committee and member of the board of trustees of the Sarasota Opera. David served as the

vice president, general counsel and secretary of Praxair, Inc., from 1992-2004. David received a bachelor's degree from Clark University and his doctorate from Boston College Law School. He is a former member of the State Bar of Michigan and the Bar of the US Supreme Court. David can be reached at dchaifetz@msn.com.

TAMRA L. DOLLIN, MSW, CPCC, LIFE & LEGACY® Community Consultant, Harold Grinspoon Foundation (HGF)

Tamra L. Dollin is a LIFE & LEGACY community consultant providing training and support to communities across North America to secure meaningful legacy gifts to build organizational endowments. Working in the Jewish community for over 25 years, Tamra most recently directed the establishment of Ramah in the Rockies, focusing on project management, fundraising, and board development. She is an alumna of the Wexner Graduate Fellowship and is a certified professional co-active coach. Tamra holds master's degrees from Columbia University and the Jewish Theological Seminary, and an undergraduate degree from UC Berkeley. Tamra can be reached at tammy@hgf.org.

NANETTE FRIDMAN, Founder & President, Fridman Strategies, Inc.

Nanette Fridman is a catalyst for values-driven organizations and leaders. She founded Fridman Strategies, Inc., in 2006 to assist organizations with the strategies, training and coaching to advance their missions and maximize their impact. Today, her work focuses on governance, fundraising, strategic planning, leadership, and team development. Nanette's clients range from small start-ups to large international organizations. Nanette is the author of *On Board: What Every Board Member Must Know about Nonprofits and Board Service*. A regular blogger, her articles can be seen on *eJewishPhilanthropy*, massnonprofit news and other publications. Nanette earned her doctorate, cum laude, and her master's degree in public policy from Georgetown University. She received her bachelor's degree, summa cum laude, in Political Science from Tufts University. Nanette is honored to be a Harry S. Truman Scholar. She can be contacted at fridmanstrategies@gmail.com or www.fridmanstrategies.com.

SHARNA GOLDSEKER, Founder, 21/64

Sharna Goldseker is today's leading expert on multigenerational and next generation philanthropy and—as a next gen donor herself—offers a trusted insider's perspective. As founder of 21/64, a nonprofit practice serving next gen and multigenerational philanthropic families, she has mastered and developed the industry's gold-standard tools for transforming how families who give will define their values, collaborate, and govern in the decades ahead. Sharna is the co-author of the best seller, *Generation Impact: How Next Gen Donors Are Revolutionizing Giving* published by Wiley. She and her co-author received the 2019 AFP/Skystone Partners Research Prize for Excellence in Academic Research. She received the 2017 Family Wealth Report Award for Best Philanthropy Practice, was named one of 2016's "Women of Influence" by *New York Business Journal* and one of 2014's "Women to Watch" by *Jewish Women International*. Sharna earned a bachelor's degree from the University of Pennsylvania and a master's degree in public administration in nonprofit management from NYU's Robert F. Wagner Graduate School of Public Service, where she was the inaugural Charles H. Tenney Fellow. Sharna currently serves on the board of directors of the Goldseker Foundation, a foundation established by her great-uncle, and is a member of the Collaboration for Family Flourishing, a network of leading family wealth advisors. Sharna can be reached at info@2164.net.

HAROLD GRINSPOON, Founder, Harold Grinspoon Foundation (HGF)

Harold Grinspoon, the founder of the Harold Grinspoon Foundation (along with his wife Diane Troderman), is a real estate entrepreneur and philanthropist. He is also the visionary behind HGF's key programs: PJ Library, JCamp 180®, LIFE & LEGACY®, and Voices and Visions. Harold and Diane have also established the Harold Grinspoon Charitable Foundation, which supports educational initiatives for inner city youth in Springfield, MA, recognizes Western MA teachers for professional excellence, encourages entrepreneurship, supports Western MA farmers, and supports educational and health projects in Cambodia. In June 2015, Harold and Diane signed Warren Buffet's Giving Pledge, committing to donate more than half their wealth to charitable causes.

WINNIE SANDLER GRINSPOON, President, Harold Grinspoon Foundation (HGF)

Winnie Sandler Grinspoon assumed the role of president of the Harold Grinspoon Foundation in June 2014. Winnie added this role to her long tenure as a trustee of the Harold Grinspoon Foundation. Prior to her work in philanthropy, Winnie practiced law, first in New York (Stroock & Stroock & Lavan) and Boston (Kirkpatrick & Lockhart, now K & L Gates), and more recently in her own law practice. Winnie holds a Bachelor of Science degree from Cornell University and a doctorate from Fordham University.

DR. DANIEL HELD, Chief Program Officer, UJA Federation of Greater Toronto

Dr. Daniel Held is the chief program officer at UJA Federation of Greater Toronto, responsible for the organization's strategy to strengthen the vibrancy and vitality of Jewish Toronto. He previously served as the executive director of the Julia and Henry Koschitzky Centre for Jewish Education, as well as a teacher at TanenbaumCHAT, Toronto's community high school. Daniel holds a doctorate in Jewish education and was a Wexner Fellow/Davidson Scholar and a fellow in the Mandel Executive Leadership Program. Daniel can be reached at dheld@ujafed.org.

LAURIE HERRICK, Author, Founder of Rainmaker Consulting, and Program Director of the GIFT Leadership Institute of JCamp 180®, Harold Grinspoon Foundation (HGF)

With over 20 years of experience in the not-for-profit sector, Laurie Herrick is a fundraising consultant and entrepreneur with emphasis on creating breakthroughs by empowering leaders to build a healthy culture of philanthropy within their organizations. By serving as a development director, executive director, board member and board chair, Laurie's experiences led her to profound awareness of the challenges organizations face. In 2008, she focused her energy on Jewish camps through JCamp 180, building a coaching approach that addressed the destructive mindset of scarcity and trained organizational leaders to be intentional in creating a mindset of abundance. Laurie is the author of the book *Choose Abundance*. You can reach her at laurie@rainmkr.com or www.chooseabundancebook.com.

RUSSELL JAMES, J.D., Ph.D., CFP®, Professor of Personal Financial Planning, Texas Tech University

Russell James is a professor and director of graduate studies in Charitable Financial Planning at Texas Tech University. After more than a quarter century spent as a planned giving fundraiser, an estate planning attorney in private practice, a major gifts fundraiser/college president and now a university professor researching charitable giving and fundraising, his focus is to make and share words, pictures, and discoveries that help

others to encourage generosity. Russell has over 75 peer-reviewed scientific journal and law articles. He has been quoted on charitable and financial issues in a variety of news sources including *The Economist*, *The New York Times*, *The Wall Street Journal*, *CNN*, *MSNBC*, *CNBC*, *ABC News*, *U.S. News & World Report*, *USA Today*, *the Associated Press*, *Bloomberg News*, and the *Chronicle of Philanthropy*. His financial neuroimaging research was profiled in *The Wall Street Journal's* Smart Money Magazine. In 2021, he was elected to the Hall of Fame of the National Association of Charitable Gift Planners. Russell can be reached at russell.james@ttu.edu.

DENA MORRIS KAUFMAN, CFRE, CAP®, LIFE & LEGACY® Community Consultant, Harold Grinspoon Foundation (HGF)

Dena Morris Kaufman is a LIFE & LEGACY community consultant. In her role at HGF, she provides training and support to communities across North America to secure meaningful legacy gifts to build organizational endowments. Prior to joining HGF, Dena was the director of philanthropy for Sojourner Center, the nation's largest domestic violence shelter. Her professional career has also included nine years at the Jewish Federation of Greater Phoenix in various campaign roles and development director at URJ Camp Newman. Dena has a degree in business, public, and private administration from the University of California, Riverside, is a Certified Fundraising Executive and a Chartered Advisor in Philanthropy. Dena can be reached at dena@hgf.org.

JAMIE LIGHT, Director of Conferences and Events, Harold Grinspoon Foundation (HGF)

Jamie Light is the director of conferences and events for the Harold Grinspoon Foundation. Previously, Jamie worked in higher education and as a consultant specializing in strategic storytelling and leadership development. Jamie has a bachelor's degree in psychology and business from Washington University in St. Louis and a master's degree in college student personnel from Bowling Green State University. Jamie has been an active board member for The Temple-Tifereth Israel and a long-time volunteer for Alpha Epsilon Phi Sorority. Jamie can be reached at jlight@hgf.org.

JORI MENDEL, Chief Foundation Officer, Atlanta Jewish Foundation

Jori Mendel serves as Chief Foundation Officer of Atlanta Jewish Foundation. She brings to this role her talent and expertise from years in private, public, and nonprofit sectors. Jori is a changemaker whose driving entrepreneurial spirit sparks innovation. Before joining the Atlanta Jewish Foundation team, she served as the first-ever Vice President of Innovation at Jewish Federation of Greater Atlanta. In this role, she built the infrastructure to firmly establish Jewish Atlanta as a thriving center of innovation. She led a team that incubated and championed new ideas and methodologies, and also raised significant funds to seed new ideas and spur collaboration. Jori earned her master's in Marketing & Entrepreneurship. She currently serves on the Jim Joseph Foundation's Teen Operating Committee advisory board. You can reach Jori at jmendel@jewishatlanta.org.

LOTTIE FRYER NILSEN, Vice President, Jacobson Jewish Community Foundation

Lottie Fryer Nilsen, CFRE, is the vice president of the Jacobson Jewish Community Foundation (JJCF) at the Jewish Federation of South Palm Beach County. A fundraising and communications professional in the non-profit community for more than 20 years, Lottie joined the Federation in 2012 as the director of corporate

sponsorship and annual campaign development officer, before moving to the Foundation side in 2014. Lottie has managed the JJCF's successful partnership with the Harold Grinspoon Foundation's LIFE & LEGACY initiative since it launched in 2015. She now oversees all aspects of the Jacobson Jewish Community Foundation's endowments, initiatives, and investments. You can reach Lottie at LottieN@bocafed.org.

ASHLEY PRESSMAN, Executive Director, Jewish Volunteer Connection

Ashley Pressman is executive director of Jewish Volunteer Connection and served as the assistant director and director since 2004. She has been involved with creating new and innovative ways to engage volunteers in meaningful short-and long-term service, focusing on creating motivation for volunteers through accessible, meaningful service, and strategic education. Her goal is to inspire people to become committed to causes they care about and integrate service into their own Jewish identity and understanding of Jewish community. Ashley holds master's degrees in social work from the University of Maryland and Jewish communal service from Baltimore Hebrew University. She has a bachelor's degree from UNC-Chapel Hill. She is the winner of the Darrell Friedman Institute Outstanding Jewish Professional Award and the Neely Tal Snyder Community Impact Award. Ashley can be reached at apressman@associated.org.

JULIA RISEMAN, JCamp 180® Mentor, Harold Grinspoon Foundation (HGF)

Since joining the JCamp 180 program in 2008, Julia Riseman has supported close to 50 Jewish camps to develop legacy fundraising efforts as part of comprehensive fundraising planning resulting in over \$225 million raised in philanthropic support for capital campaigns, scholarships, general operating, and lasting endowments. She also guides Jewish camps through strategic planning and provides executive coaching and mentoring to Jewish camps across North America. Previously, Julia was a co-founder of two non-profit organizations and a development director of an independent school. She has a master's degree from the Simmons School of Management. Her one summer at Jewish day camp (JCC Camp Coleman) instilled a love of Jewish music and Israeli dancing and connected her to her Jewish grandparents and heritage. Julia can be reached at julia@hgf.org.

DANA RUBIN, Development Director, Jewish Family and Children Service of Minneapolis

Dana Rubin joined Jewish Family and Children Services (JFCS) in 2013 as the development director. Previously, she was the assistant campaign director and campaign director at the Minneapolis Jewish Federation for 15 years. Dana oversees most of the fundraising efforts of JFCS which includes, but is not limited to, the annual campaign, annual benefit, direct program support, tribute cards, and the endowment fund. In addition to her professional work, Dana completed nearly six years as the Temple Israel Sisterhood board president. She currently is the president of the Friends of the Ridgedale Library, and co-president of the Hennepin County Libraries Friends Council. She is a new member of the Temple Israel Foundation board of directors and is chairing the Foundation Stewardship Committee. Dana can be reached at DRubin@jfcsmpls.org.

MARK SILBERMAN, Board Chair, Jewish Future Pledge

Mark Silberman is the chair of the board of the Jewish Future Pledge and serves on the executive committee of the Jewish Federations of North America. He also serves on the board of Jewish Family & Career Services, Hillel's of Atlanta Georgia Jewish Film Festival, and the Alliance Theatre. Mark has been a primary funder and

advocate of PJ Library and Jewish Camping in the Atlanta community. He is a national board member of the Foundation for Jewish Camping. Mark is a past president of Temple Kehillat Chaim in Roswell, Georgia, as well as a past national board member of the Union for Reform Judaism (URJ), where he served on the North American Camping (NAC) committee, budget committee, and business practices committee. He is the past chair of the board for the Jewish Federation of Greater Atlanta and has served on the Board of Trustees for the past 8 years. Mark holds a bachelor's degree from American University. Mark can be reached at Silberman1415@gmail.com.

ARLENE D. SCHIFF, National Director, LIFE & LEGACY®, Harold Grinspoon Foundation (HGF)

Arlene D. Schiff is the national director of the LIFE & LEGACY program, overseeing HGF's work with more than 750 organizations in 72 communities across North America. In addition, she provides training and support to a portfolio of communities to secure meaningful legacy commitments to build organizational endowments. Prior to joining HGF in 2013, Arlene served as the executive director of the Jewish Federation of the Berkshires. During her 12-year tenure, she provided visionary leadership while devising and executing strategic plans that centered on community building and garnering support for philanthropic giving. Arlene is a graduate of the University of Massachusetts and holds a master's degree from Harvard University. Arlene can be reached at arlene@hgf.org.

PATRICK SCHMITT, Co-founder, FreeWill

Patrick Schmitt is the co-founder of FreeWill, a social venture which has helped organizations to generate more than \$4.5 billion in new planned gifts, stock gifts, and qualified charitable distributions. Patrick and his co-founder, Jenny, were recently named two of the Top 50 Philanthropists in the world by *Town & Country*. He previously ran email fundraising for President Obama, where his team invented many of the existing best practices in digital fundraising. He served as head of innovation at Change.org, helping to grow the organization to 200 million members in just four years. Patrick received his bachelor's degree from Georgetown University and a master's degree from Stanford University. Patrick can be reached at www.freewill.com.

JERI ZIMMERMAN, Executive Director, Jewish Federation of the Lehigh Valley

Jeri Zimmerman became the executive director of the Jewish Federation of the Lehigh Valley in 2019 after serving as assistant and then interim executive director since 2016. For 12 years prior, Jeri was the director of the Center for Israel and Overseas at the Jewish Federation of Greater Philadelphia, where she provided coordination and leadership for funding and fundraising related to that Federation's Israel and overseas agenda. Her extensive Jewish communal experience also includes seven years as the Philadelphia regional director of the American Committee for the Weizmann Institute of Science, and 10 years as the first executive director of the UJA/Federation of Princeton, New Jersey. A graduate of Temple University, Jeri also holds a Master of Education in community counseling from Lehigh University. Jeri can be reached at jeri@jflv.org.