Nonprofit Navigator - July 24 Recap

View Recording (85 mins, no highlights): Watch Here

Key Themes and Takeaways:

Opening:

- Akiva moved houses the same day (across the street!) and opened with some casual humor.
- Encouraged participants to use the start of each session to ask questions early on to maximize time.

Module 1 Recap:

• Importance of Deep Thinking:

Participants must clearly define:

- What crisis/problem they're solving.
- What pain points they are relieving.
- How they are relieving them.
- Hard but Crucial:

Module 1 may be the most *emotionally challenging* but also *most important* to fully understand your nonprofit's "why."

Module 2 Overview:

- **Topic:** Technical and legal setup of a nonprofit.
- Highlights:
 - o Opening a 501(c)(3) in the U.S.
 - Banking and working with donor-advised funds.
 - Setting up a board and writing bylaws (this section is *relevant to everyone*).
- Note:

Module 2 is more technical and dry. Tani should watch it fully because it's relevant to his organization formation.

Communication Techniques (Mini-Training):

1. Use Numbers in Content:

- Titles with numbers ("3 Communication Techniques You Need to Know") grab attention.
- Numbers make information feel manageable and finite.

2. Get to "No" First (from Never Split the Difference by Chris Voss):

- Asking questions where people can say "No" early builds safety.
- Makes people more likely to say "Yes" later.
- Example: Instead of "Would you like to donate?", try "Have you given up on helping kids with X?" (leading to a natural "No.")

3. Get to a "That's Right" Moment:

- Instead of convincing people you're "right," guide them to say "That's right" themselves.
- How?
 - Share a personal story and ask if they can relate.
 - Summarize their experience back to them accurately.
- o Builds deep emotional buy-in and trust.

Group Chat Discussion:

- Should there be a group space to collaborate?
 - Akiva suggested **Slack** (less distracting than WhatsApp).
 - Some participants felt there wasn't a huge need yet.
 - o Idea tabled for now but might revisit later.

Tani's Question: How to Educate About a Complex Topic Like Religious Trauma

• Challenge:

"Religious trauma" requires education; it's not as immediately understandable as "shopping for seniors."

• Brainstormed Solutions:

- o Consider a broader, more positive framing (e.g., Religious Health).
- Understand your audience: Some may love discussing issues; others may defend the system.
- Use pain points carefully: heavy words like "trauma" may trigger defensiveness.
- Survey Idea:

Tani should survey 10–20 people:

■ What comes to mind when you hear "religious trauma"?

Do you know someone affected by it?

• General Principle:

If a term requires too much explanation, it may lose engagement. Find language that feels immediately relatable.

Rabbi W's Question: How to Pick a Target Audience

• Two Part Answer:

1. Who Energizes You?

Focus on teaching those you *enjoy* serving (e.g., growth-oriented individuals).

2. Who Can Help Scale the Mission?

You may need broader reach later, but start with a core audience that gets it and loves it.

• Pro Tip:

You attract people by *being* magnetic, not by chasing everyone. Focus on aligned individuals first, others will follow naturally.

Adele's Question: How to Hype Up the YTA Staff

• Problem:

Staff aren't responding to requests for help fundraising.

• Solutions:

Individual Conversations > Group Chat:

Reach out 1:1 to build personal buy-in.

Alignment is Key:

Show how fundraising helps *them* (e.g., higher salaries, better services).

Polls Work:

Use WhatsApp polls to get engagement instead of just text.

Staff Training:

Adele suggested role-playing exercises to normalize asking for money and remove stigma.

Cultural Shift Needed:

Remind staff: fundraising isn't begging — it's building a better future for the kids they care about.

Closing Notes:

Energy Check:

Akiva acknowledged everyone's questions and excitement.

• Action Items:

- Tani to send pitch deck for review.
- Adele to continue strategy development with individual conversations and vision alignment.
- Rabbi W to think about donor growth strategy around "growth-oriented individuals."

• General Reminder:

Fundraising is an emotional art. Alignment and emotional safety are key to success!

Nonprofit Navigator Meeting Recap

Date: July 31

Duration: 73 minutes

Recording: View Recording

1. Opening and Introductions

- Akiva, Roi, Adele, Rabbi W, and others joined the session.
- Akiva shared that he had just come from a surprisingly excellent fundraising webinar.
- Rabbi W shared a sweet email he received from Barry, demonstrating thoughtful communication and values.

2. CRM Launch: Overview and Training

- Akiva introduced the **Nonprofit Navigator CRM**, developed in partnership with Roi.
- Purpose: A simple, effective CRM solution tailored for nonprofits, addressing the common problem that most nonprofits lack a good system to track contacts and interactions.

Key CRM Features

- Contact Management: Add contacts manually or automatically through website forms.
- Pipeline Management: Visualize donor cultivation stages (lead → interested → committed → donated).
- Tasks & Notes: Assign tasks, take notes, schedule appointments, and upload documents per contact.
- Mass Email and Texting: Replaces services like Mailchimp at a fraction of the cost.
- WhatsApp Integration: Manage official WhatsApp communications with templates and Al-assisted messaging.
- Website Builder: Pre-built nonprofit template available; training provided to customize.
- **Mobile App:** Downloadable via a provided link after registration.

3. Technical Setup

- **Domain Required:** Each nonprofit must have a domain name (recommended provider: Namecheap).
- **Registration Link:** Roi shared a sign-up link for CRM setup.
- **Zero Cost During Beta:** CRM access is completely free through **February** (8 months total).
- After February, nonprofits can continue using the CRM at a discounted rate of \$97/month (includes \$10 credit for email/text usage).

4. Support

- Roi and Akiva emphasized that **full tech support** is available during the beta period.
- Participants can reach out via WhatsApp or email for help setting up, customizing, or troubleshooting.
- Tutorial Videos: Roi will send detailed videos covering step-by-step setup, use of dashboards, conversations, and website editing.

5. Two CRM Options Introduced

Akiva presented **two CRM options** based on organizational needs:

- 1. **Bugatti CRM** (full-featured)
 - For more developed nonprofits (e.g., KLM, YTA).
 - Offers robust functionality like automation, fundraising pipelines, WhatsApp integration, full websites, etc.
- 2. **Miracle CRM** (simple Google Sheets version)
 - For startups and smaller nonprofits (e.g., Tani and Sruly's projects).
 - Includes simple finance tracking, donor database, project management, and event budgeting.
 - Less technical, easier to maintain for beginners.

6. Fundraising Tip: Building Trust with Donors

Akiva shared a powerful lesson from his recent fundraising webinar:

- Trust is key in donor relationships.
- Strategies to Build Trust:
 - Find and emphasize commonalities at the start of the conversation.

- Practice deep listening without rushing to speak.
- Let donors open up about their lives personal connection builds loyalty.
- Treat every donor, regardless of donation size, with genuine curiosity and care.
- Focus on relationships, not just the ask.

7. Next Steps and Action Items

- CRM Registration: Everyone should register using Roi's link and set up their accounts.
- Watch Tutorials: Roi will send videos; everyone should familiarize themselves with the CRM.
- Coaching Sessions: Participants should book bi-weekly 1:1 coaching sessions with Akiva.
- **Check-In:** Next week's session will include a check-in on everyone's progress (optional half-hour extension).
- Group Naming: Participants brainstormed the idea of naming the CRM "Bugatti CRM" for its "luxury" nonprofit focus (no final decision yet).

Reminders

- No charges will happen without notice.
- Free CRM access until February 2026.
- Stay in touch if help is needed setting up websites, importing contacts, customizing templates, or sending mass communications.

Nonprofit Navigator Meeting Recap

Date: July 31

Duration: 73 minutes

Recording: View Recording

1. Opening and Introductions

- Akiva, Roi, Adele, Rabbi W, and others joined the session.
- Akiva shared that he had just come from a surprisingly excellent fundraising webinar.

 Rabbi W shared a sweet email he received from Barry, demonstrating thoughtful communication and values.

2. CRM Launch: Overview and Training

- Akiva introduced the **Nonprofit Navigator CRM**, developed in partnership with Roi.
- Purpose: A simple, effective CRM solution tailored for nonprofits, addressing the common problem that most nonprofits lack a good system to track contacts and interactions.

Key CRM Features

- Contact Management: Add contacts manually or automatically through website forms.
- Pipeline Management: Visualize donor cultivation stages (lead → interested → committed → donated).
- Tasks & Notes: Assign tasks, take notes, schedule appointments, and upload documents per contact.
- Mass Email and Texting: Replaces services like Mailchimp at a fraction of the cost.
- WhatsApp Integration: Manage official WhatsApp communications with templates and Al-assisted messaging.
- Website Builder: Pre-built nonprofit template available; training provided to customize.
- **Mobile App:** Downloadable via a provided link after registration.

3. Technical Setup

- **Domain Required:** Each nonprofit must have a domain name (recommended provider: Namecheap).
- Registration Link: Roi shared a sign-up link for CRM setup.
- **Zero Cost During Beta:** CRM access is completely free through **February** (8 months total).
- After February, nonprofits can continue using the CRM at a discounted rate of \$97/month (includes \$10 credit for email/text usage).

4. Support

Roi and Akiva emphasized that full tech support is available during the beta period.

- Participants can reach out via WhatsApp or email for help setting up, customizing, or troubleshooting.
- Tutorial Videos: Roi will send detailed videos covering step-by-step setup, use of dashboards, conversations, and website editing.

5. Two CRM Options Introduced

Akiva presented **two CRM options** based on organizational needs:

- 1. **Bugatti CRM** (full-featured)
 - For more developed nonprofits (e.g., KLM, YTA).
 - Offers robust functionality like automation, fundraising pipelines, WhatsApp integration, full websites, etc.
- 2. **Miracle CRM** (simple Google Sheets version)
 - o For startups and smaller nonprofits (e.g., Tani and Sruly's projects).
 - Includes simple finance tracking, donor database, project management, and event budgeting.
 - Less technical, easier to maintain for beginners.

6. Fundraising Tip: Building Trust with Donors

Akiva shared a powerful lesson from his recent fundraising webinar:

- Trust is key in donor relationships.
- Strategies to Build Trust:
 - Find and emphasize commonalities at the start of the conversation.
 - Practice deep listening without rushing to speak.
 - Let donors open up about their lives personal connection builds loyalty.
 - Treat every donor, regardless of donation size, with genuine curiosity and care.
 - Focus on relationships, not just the ask.

7. Next Steps and Action Items

- CRM Registration: Everyone should register using Roi's link and set up their accounts.
- Watch Tutorials: Roi will send videos; everyone should familiarize themselves with the CRM.

- Coaching Sessions: Participants should book bi-weekly 1:1 coaching sessions with Akiva.
- **Check-In:** Next week's session will include a check-in on everyone's progress (optional half-hour extension).
- **Group Naming:** Participants brainstormed the idea of naming the CRM "**Bugatti CRM**" for its "luxury" nonprofit focus (no final decision yet).

Reminders

- No charges will happen without notice.
- Free CRM access until February 2026.
- Stay in touch if help is needed setting up websites, importing contacts, customizing templates, or sending mass communications.

Nonprofit Navigator Meeting Recap

Date: August 7

Duration: 111 minutes

Recording: View Recording

1. Opening

- Participants: Akiva, Sruly, Adele, Rabbi W, Tani, and others.
- Akiva introduced the session and reviewed the course roadmap:
 - Module 1: Mission development
 - Module 2: Legal basics (501c3 setup)
 - Module 3: Digital assets (websites, budgeting, project management)
 - Module 4: Fundraising Made Simple (current focus)
- **Note:** Module 4 is the longest and most critical part of the course, with 17 short video segments (not all mandatory viewing).

2. Fundraising Mindset

Akiva outlined two essential qualities for successful fundraising:

- Authenticity: Be genuine and real; donors respond to sincerity more than polish.
- Ability to Ask: Practice asking clearly and confidently; avoid hesitation.

Key Fundraising Tips:

- Fundraising is an emotional process, not just a logical one.
- Connection, motivation, and urgency are critical to successful asks.
- Practice is essential: roleplay and rehearse asks with peers to build confidence.

3. Individual Updates & Coaching

Sruly Heller: Mindfulness Course Project

 Passion: Bringing mindfulness to a broader audience after a personally impactful experience.

• Progress:

- Reached out to the course creator to discuss collaboration and fundraising.
- Initial call and in-person meeting were positive.
- Sruly is working on:
 - Defining a clear mission statement.
 - Building a simple fundraising pitch and donor list.
 - Practicing low-pressure asks (e.g., \$18 donations).
- Roleplay exercise: Practiced an ask focused on inviting participation without pressure.

Coaching Tips for Sruly:

- Be authentic even when not feeling 100% passionate.
- Start by reaching out to previous course participants.
- Make asks casual and open-ended ("Would you or someone you know be interested in helping?").
- Avoid using "maybe" in asks to project confidence.

Adele Lerner: Girls' High School for Olim

• Tagline Discussion:

- Options:
 - 1. Your Path to Success in Israel (favorite)
 - 2. Redefining High School in Israel
 - 3. Unlocking Your Potential in Israel
- Consensus: Your Path to Success in Israel was voted the strongest—clear, parent-focused, and emotionally resonant.

Fundraising Progress:

- Working on backend logistics: website, receipt systems, marketing materials.
- Summer is a slower season; parent engagement is challenging.
- Plan to create a fundraising timeline and start building parent support through coffee dates and casual parlor meetings.
- Homework: Meet with at least one person or create a clear action plan by next week.

Rabbi W: Donor Strategy Coaching

- Situation: Long-term donor (billionaire) has consistently given \$36,000 annually.
- Goal: Increase the gift for a new project.

Feedback for Rabbi W:

- Focus the conversation on *what's new* and exciting—donors are more likely to give more when there's a fresh initiative.
- Don't remind donors of their passions for other causes (e.g., poverty) when asking for something different.
- Keep the conversation emotional and vision-driven, not educational or logical.
- Avoid the word "increase" during the ask; focus on the impact the donation will make.

Tani Polansky: Launching "Retrace" (Religious Trauma Center)

- **Project Name:** Retrace (Religious Trauma Center RTC)
- **Concept:** Support individuals who feel alienated from Judaism by exploring where religious trauma may have occurred ("retracing" steps).
- Challenges:
 - Concerned about launching before having formal credentials (Semicha and Ph.D.).
 - Wants to build credibility and R&D before going public.

Coaching for Tani:

- Launching now builds visibility and credibility even before official credentials.
- Focus on free actions: writing blog posts, publishing short papers, creating basic awareness content.
- Avoid getting stuck in over-researching—balance research with action.
- Define clear organizational goals: either focus on *doing* or *researching* (not both heavily at this stage).
- **Next Step:** Build a fundraising ask around R&D support (e.g., \$10,000 goal, with part funding living expenses).

4. Key Takeaways

- Authenticity and asking are fundamental.
- Fundraising is about emotional connection, not persuasion.
- Tailor asks to match donors' existing values.
- Take small, actionable steps even if the full vision isn't ready.
- Celebrate progress and keep moving forward.

Next Actions:

- Sruly: Finalize mission statement and soft launch asks.
- Adele: Create a fundraising action plan or hold one parent meeting.
- Rabbi W: Craft a focused emotional ask tied to the new project.
- Tani: Launch R&D phase softly; start building content and a support list.

Nonprofit Navigator Meeting Summary (August 14)

Facilitator: Akiva Naiman

Duration: ~80 minutes

Main Topics: Grants, Fundraising Mindset, Social Media Strategy, Texas Trip Planning, Course

Feedback

1. Module Updates and Focus

- Module 5 (Grant Writing) was released a short, practical 9-minute module.
- Grants are a long game:
 - Expect a ~5% success rate even with many applications.
 - ChatGPT and AI have transformed grant writing, allowing solid drafts to be produced in 10–20 minutes.
 - Do not depend on grants for funding; apply because it is quick and low-effort, not because it is guaranteed.
- **Main Takeaway:** Focus the majority of your time on direct fundraising rather than chasing grants.

2. FUND: Fundraising Mindset Model

Focus on the Cause:

You are not asking for yourself — you are advocating for your mission. Internalize this mindset.

• Understand Rejection:

Every "no" is a stepping stone. Always ask why — even difficult feedback helps you improve.

Nurture Relationships:

Stay in touch casually (texts, updates) — consistent small touches build strong loyalty over time.

• Develop Confidence:

Confidence comes from clarity. When you are mission-driven and relationship-centered, you naturally walk into meetings with assurance.

 Akiva's Reminder: Fundraising is about helping make the world better, not about asking for money.

3. Social Media and Marketing

• **Deprioritize social media** for now — it requires significant effort with minimal direct fundraising return.

• Primary Use:

- Focus on using social media to retain and engage current supporters rather than attract new ones.
- Content should be simple, shareable, and inspirational, similar to the "Meaningful Minute" model.
- Consistency is more important than volume. Short weekly updates or graphics are ideal.

Tactical Tip:

Hire low-cost editors through platforms like Fiverr to batch-edit content instead of managing everything internally.

• Marketing Strategy Shift:

Marketing should support current donor relationships, not replace direct fundraising efforts.

4. Texas Fundraising Trip (Case Study)

• Trip Plan:

- Speaking at a Shabbaton (partnered with Torch) and giving multiple classes.
- Strategic placements at Shabbat meals, women's classes, and business lunches.
- Meetings with key supporters, including past donors and new prospects.

Merch Strategy:

- Distribute beautiful, practical items (e.g., mitzvah bookmarks, business-card sized reminders).
- All materials should match the organization's branding: beautiful, clear, and impactful.

Fundraising Strategy:

- Frame the trip as a fundraising opportunity upfront (prepare people mentally before making an ask).
- Create a "Big Vision" for donors to join (e.g., raising \$20,000 to sponsor a new program).
- Work through local ambassadors who help advocate on your behalf.

One-on-One Asks:

- Identify and set up personal meetings with major prospects.
- Paint a passionate, emotional vision.

 Ask confidently for a significant gift (\$10,000+), potentially using it as a matching gift.

Key Reminder:

Donors want to feel part of something inspiring and ambitious, not merely keeping an organization afloat.

5. Program Feedback and Adjustments

 Modules are useful, but participants prefer that the main teaching happens live during the group sessions.

• Suggestion:

- Deliver the main content live, especially early modules such as Mission, Problem, Solution, and Ask.
- o Recorded modules should serve as reinforcement and review tools.
- o Provide more scaffolded coaching time, especially early in the course.

New Plan:

- Keep the regular session (8:00–9:15 pm) focused on learning and group coaching.
- Add an optional working session (9:15–10:00 pm) each week for participants to get hands-on help, especially on mission statements and pitch decks.

• Future Tool:

 Create a Pitch Deck Generator (e.g., a Canva template plus form inputs) to simplify the early fundraising materials for busy participants.

6. Adele's Update – Fundraising Strategy for School

- Working on a three-tiered funding graphic:
 - o Minimum essential needs (to cover basic operations).
 - o Growth and staff investment (allowing teachers and programs to thrive).
 - Big dreams (long-term transformative goals).

• Shift in Framing:

- Rather than presenting survival as the goal, present thriving as the standard.
- "We do not want our students or teachers just to survive. We want them to thrive."
- Fundraising should inspire donors to build something excellent, not just maintain the status quo.

Mindset Challenge:

Some leadership remains resigned to "how things are" (e.g., low salaries, minimal

resources). Fundraising efforts must work to reframe this reality and show what is possible.

Key Action Items

Who	What	By When
Rabbi W	Book a coaching call with Akiva to prepare for Texas fundraising asks.	ASAP
Adele	Finalize three-tier fundraising structure for Sunday meeting with school leadership.	Sunday
Both	Draft a one-page Big Vision statement (clarifying goals and major needs).	Next 7 days
Akiva	Add optional working sessions (9:15–10:00 pm) to course structure.	Next cohort
Everyone	Brainstorm low-cost, high-impact merchandise ideas (e.g., branded chargers, water bottles) with funnel links.	Ongoing

Nonprofit Navigator - August 21 Meeting Summary

Recording: Watch here (64 min)

Participants: Akiva Naiman, Tani Polansky

Main Focus: Coaching Dynamics, Refining the Vision for Tefilah, Fundraising Strategy

1. Coaching Dynamics and Relationship Building

• Opening Discussion:

Tani reflected on a previous coaching session where he mistakenly shifted into giving unsolicited advice ("launching into a drasha").

- Lesson: Always ask before offering advice.
- Key Question to Ask:

"Do you want support, advice, or just for me to listen?"

• Personal Development Tip:

Tani was encouraged to mentally "rewrite" uncomfortable past experiences (using a John Bradshaw exercise) to help change internal patterns.

2. Refining the Vision for *Tefilah* Project

Vision Statement (Draft):

Create a *renaissance of soulful, high-quality Jewish music* that serves as a true vehicle for **prayer and connection**.

• The Problem:

- Most current Jewish music lacks depth and does not foster real communal prayer experiences.
- Religious services often feel disconnected; music is not integrated meaningfully into davening.

• The Solution:

- Develop a new standard for Jewish music where the music itself becomes prayer.
- Empower artists who are writing authentic, transformative Jewish music but lack resources.

Tangible Goals:

- Host 2 professionally produced Tefilah concerts per year.
- Create an artist incubator to sponsor and mentor new musicians.
- Produce and release new original music, recordings, and videos annually.

3. Language and Framing

Important Branding Points:

- Tefilah is not just a concert; it is an experience of collective prayer through music.
- Targeting the diaspora Jewish community (especially English-speaking Jews).
- Focus on transformational prayer experiences, not just performance or entertainment.

• Comparison:

 Tefilah will borrow best practices from Christian worship music (energy, production quality, collective singing) while firmly rooting it in authentic Jewish spirituality.

• Potential Rebranding:

 Working title adjustment from Tefilah to Tefilah Music or a new brand name to avoid confusion.

4. Target Audience and Fundraising Strategy

• Target Donors:

- o Primarily Jewish donors who value spirituality and innovation in Jewish life.
- Possibly tap into non-Orthodox Jewish donors who are already familiar with transformational prayer music models.

Fundraising Focus:

- Paint the emotional pain point: Without Tefilah, Jewish prayer experiences risk staying stagnant, disconnected, and uninspired.
- Highlight the opportunity for donors to help create a **new movement** in Jewish communal life.

• Immediate Next Steps:

- Complete Module 1: Clarify value proposition, mission, vision, and initial fundraising pitch.
- Develop Pitch Deck and One-Pager: Have fundraising materials ready.
- Start Calling Contacts: Begin direct outreach to friends, family, and community connections.

5. Business Model for Sustainability

Artist Incubator Model:

Sponsor 2–3 artists per year (\$6,000 per artist: \$3,000 for production + \$3,000 for marketing).

• Concerts:

o Ticket sales, sponsorships, and partnerships with communities.

Passive Income Ideas:

- o Take a small booking commission for artists.
- Split online revenue (Spotify, YouTube) between artists and *Tefilah*.

6. Final Reflections

• Akiva's Encouragement:

- o *Tefilah* is a project that feels deeply aligned with Tani's passion and strengths.
- o There is clear energy and readiness to move forward after years of ideation.

• Next Coaching Steps:

• Tani to complete Module 1 and schedule a follow-up to review materials and plan initial donor calls.

Nonprofit Navigator — September 4

Recording: Watch here (85 min)

Key Participants

- Akiva Naiman (Coach)
- Tani Polansky (Founder, Tefilah Project)
- Others (absent): Sirelle, Adele, Rabbi Weikwe

Session Focus

- Individual coaching for Tani
- Strategic planning for Tani's new nonprofit (focused on experiential Jewish prayer through music)

Current Status & Wins

- New Team Members:
 - Nathan (Advisor / Unity Committee)
 - Becky (Strategic Supporter, helped with one-pager)
 - Noah Zebli (Intern)
 - David (Creative Director)
 - Rabbi Yirmiyahu Ginsburg (Spiritual Advisor)
- Major Meeting Outcomes:
 - o Developed core team.
 - Confirmed intern (Noah).
 - Becky helped narrow the one-pager focus.
 - Fiscal Sponsorship options discussed:
 - Global Day of Unplugging (5–10% fee)
 - Jewish Creative Initiative (JCI) (5% fee, highly recommended)

The Core Vision (WHY)

- **Problem:** Many Jews feel disconnected from prayer and synagogue experiences.
- **Gap:** Jewish music exists, but little *prayer-centered* music exists.
- Mission:
 - Create experiential *Tefilah Music* (music talking to or about G-d).
 - Inspire a personal and communal connection to prayer.
 - o Provide a spiritual outlet even outside of synagogue.

How Tefilah Music is Different

- Teaches people **how** to pray through music.
- Brings *prayer* alive not just meaningful Jewish music.
- Creates spiritual experiences outside traditional shul settings.
- Inspired by the power of Christian worship music infrastructure (but not marketed that way).

Program Structure (HOW)

- 1. Concerts:
 - o Full live concerts with a band.
 - o Recorded, mixed, and produced into albums/videos.
- 2. Artists Incubator:
 - Mentorship and support for new artists producing prayer-centered music.
- 3. Nonprofit Record Label:
 - Support artists to record 5+ songs per year.
 - Artists keep their revenue.

Immediate Next Steps (Phase 1: Launch Concert)

- Launch concert around Chanukah 2024.
- Concert will provide content for promotion and marketing.
- Build audience through email list, YouTube, social media.

Budget Overview

Category	Amount
Concert production (band, venue, video)	\$25,000
Tani's salary (for 4–6 months)	\$10,000
Total	\$35,000 (first phase)

Concert Revenue Estimate:

200 attendees × \$35 = \$7,000 (to offset costs)

Total Fundraising Goal for Phase 1: \$28,000 - \$30,000

Larger Vision (Phase 2)

- Goal: Raise an additional \$70,000–\$85,000 after Phase 1.
- Funds would:
 - Fund additional concerts.
 - Record an album.
 - Produce songs for new artists.
 - o Build the organization into a sustainable nonprofit movement.

Key Strategy Advice from Akiva

- Focus on Phase 1 first.
- Don't talk about the \$85k vision yet only about raising \$30k now.
- Future phases can be explained if a donor asks.
- Frame the concerts as the start of a long-term journey to transform Jewish prayer culture.

Additional Notes

- Website:
 - Simple landing page recommended. (Tani's contact: Avi Orlean's team.)

• Participant Journey:

- Concert sparks realization →
- Orip content (YouTube, email) deepens connection →
- o Long-term impact on personal prayer lives.

To-Do List for Tani

- 1. Finish one-pager with a clear participant journey.
- 2. Create a simple pitch deck / Canva visual.
- 3. Focus pitch on raising \$30k.
- 4. Plan Phase 1 (concert) carefully, then move to Phase 2 fundraising.
- 5. Prioritize paying herself for sustainability.

Nonprofit Navigator Meeting

Date: October 9 Length: 73 minutes Participants:

Akiva NaimanAdele LernerMeira Cohen

1. Welcome and Casual Check-in

- Akiva and Adele started casually (ice cream talk, catching up).
- Akiva noted that Connie forgot about the meeting.
- Only Adele and Tani were on; Meira was trying to connect.
- No meetings for the next two weeks due to holidays.

2. Updates on Participants

- Rabbi W:
 - Finished fundraising goal: raised \$50K over 10 months with a \$5K upfront payment.
 - o Akiva decided not to chase him further; considers him "done" with the course.
- Recruitment Update:
 - Two more organizations might join soon.

3. Testimonial Request

- Adele asked about writing a testimonial.
- Akiva's advice: Best testimonials compare the "worst moment" before the course to now (before/after style).

4. Adele's Update: School Fundraising

- Challenges:
 - School year just started. Busy adjusting to new math curriculum.

- Textbooks were delayed due to late printing.
- Hard to find quiet time to focus on fundraising tasks.

Newsletter Discussion:

- Start simple pick **one highlight** per issue.
- Newsletters should not be "everything we're doing."
- Keep it short and readable (attention span = 5–10 seconds).
- Adele suggested featuring each grade with a guick highlight.
- o Reminder: "Don't let perfect be the enemy of good."

5. Stepping Stones Introduction

- Meira introduced herself and Stepping Stones Wilderness Initiative (SSWI):
 - **Program:** Six-week therapeutic wilderness experience in Israel for English-speaking teens (mental health challenges).
 - o Target Audience: American teens or Olim families.
- Adele mentioned they might send students in the future.
- Akiva explained his role is temporary (part-time CEO, launching organization).

6. Fundraising Coaching: Time Management

- **Issue:** Adele struggling to carve out dedicated fundraising time.
- Akiva's Advice:
 - Physically lock yourself in a room if needed.
 - Set boundaries post "Do Not Disturb" signs.
 - Fundraising work is important but not urgent; easy to procrastinate, dangerous to delay.

Personal Story:

 Akiva shared how he had to shift from "friend-teacher" to "responsible disciplinarian" in his second year to achieve growth.

7. Crowdfunding Campaign Planning

- Adele realized that **November** is too early (holiday disruption).
- Advice:
 - Start reaching out to matchers now.
 - Ambassadors (peer fundraisers) can wait until closer to campaign.
 - Suggested matcher minimum: \$1,800–\$2,500.

Donation Platform:

Move away from PayPal (informal setup).

Akiva recommended GiveCloud or Stripe.

8. Fundraising Pipeline Training

Product Pipeline:

- Visualize a **student journey** from entry point to program outcomes.
- Map where students start (e.g., mental health struggles) → intervention (Stepping Stones) → post-program growth.

Fundraising Pipeline:

- Two types of fundraising:
 - Support existing programs Invite donors to fund what already exists (scholarships, therapy sessions, etc.).
 - Create something new If a donor wants a new initiative (like Al classes), frame it carefully. Don't over-promise.
- Handling "new idea" donors:
 - Dig deeper into why they care.
 - Reframe their passion into existing priorities.
 - Avoid reshaping your mission to fit random requests.

9. Practical Next Steps for Meira (Stepping Stones)

- Daily Check-ins: Text Akiva each morning with yesterday's accomplishments and today's goals.
- Practice Asks: Role-play making 3 practice donation asks to family/friends.
- Finalize Roadmap:
 - Clean up goals section (make them specific).
 - Update timeline (realistic cohort numbers).
 - Adjust metrics to focus on long-term participant health instead of partnerships.
- Pitch Deck Development:
 - Work in progress. Keep building.
 - Make the deck ready for informal coffee meetings have it available but don't force it.

10. Creative Donor Engagement Ideas

• Explore an **interactive** "**choose your own adventure**" style fundraising story.

- Show donors the *real-life consequences* of supporting or not supporting the program.
- Example: Teen faced with a choice → how Stepping Stones intervention can change the outcome.

11. Closing

Big Takeaways:

- o Focus on emotional storytelling in fundraising.
- Think about pipelines (programmatic and donor engagement).
- Stay proactive but flexible.

• Next Meeting:

Meira will schedule at the beginning of next week.

Key Action Items Summary:

- Adele: Focus newsletter on one highlight, reach out to matchers, set boundaries to carve fundraising time.
- Meira: Text daily updates, practice donor asks, finish Roadmap and Pitch Deck edits, brainstorm donor engagement materials.

Nonprofit Navigator – Meeting Notes

Date: October 30

Recording: Watch here (39 min)

Participants:

Akiva Naiman

Shimon Newman

1. Casual Introduction and Icebreaker

Location Talk:

Shimon shared about growing up in Neve Etzion (early resident, 1988) and issues like narrow streets and fire truck access.

• Personal Connection:

Shimon mentioned meeting Akiva's mother during his Aliyah journey and a difficult travel experience flying from Toronto to Israel on Shiv'ah Asar B'Tammuz.

They bonded over experiences with NCSY. Shimon's wife also worked there.

2. Background and Shared Values

Shimon's Passion:

Passionate about proactive health education for teens, especially within the Jewish community.

Concerned about lack of solid health curriculums in schools, especially around drug and social media issues.

Akiva's Background:

Deep passion for teens-at-risk programs and education.

Currently involved in launching **Stepping Stones Wilderness Initiative**.

3. Discussion: Fundraising Career Overview

• Akiva's Perspective:

- Fundraising is a flexible, sustainable, mission-driven career.
- o Not rocket science but requires training, mentorship, and proactive work.
- Excellent for educators transitioning into fundraising.
- High demand for fundraisers across nonprofit world (especially post-October 7).

Career Advice:

- Salary is decent with potential for bonuses.
- Work schedule is flexible (busiest on Sunday nights for U.S. donor calls).
- Fundraising skills unlikely to be replaced by Al.
- Always a need for genuine, hard-working fundraisers.

4. Specific Opportunity Discussion

• Shimon's Concerns:

- Risk of starting with a new organization without a big donor base.
- o Financial pressure with a family already in Israel.
- Weighing pros/cons of joining a startup organization vs. an established nonprofit.

Akiva's Response:

- This opportunity is **normal for startups**.
- New organizations usually can't hire experienced fundraisers.
- Nonprofit Navigator program is designed specifically for early-stage nonprofits.
- Realistic to expect a gradual ramp-up initial fundraising wins will lead to salary growth.

Realistic Path:

- First 2 months: Take the course, start hands-on fundraising immediately.
- Light time commitment (approx. 5–7 hours per week).
- Potential side hustle (like tutoring) suggested during training period to supplement income.

5. Salary and Risk Discussion

Best Case Scenario:

Fundraising success in the first two months \rightarrow Yakov (organization head) can fund a real salary from the funds raised.

Worst Case Scenario:

Gain valuable experience, certificate, real fundraising track record \rightarrow more employable for future nonprofit roles.

Advice:

Think of it as an *investment* in yourself — experience + training will pay off, even if this specific placement doesn't long-term.

6. Coaching and Networking

• Coach Assignment:

• Shimon's coach would likely be **Elimelech Katz**, a top fundraiser at Aish Global.

Networking Tips:

- Akiva suggested connecting with Ben Gonsher (top-level fundraiser, Momentum founder connections).
- Many nonprofits actively seeking fundraisers.

• Side Hustle Suggestions:

Tutoring (especially Bar Mitzvah tutoring) could be a quick way to earn extra income.

7. Next Steps

• Decision Timeline:

- Shimon to process and discuss with family.
- No pressure to rush can join the next group coaching session (next Wednesday).

Start Date:

Once confirmed, Shimon would begin course training **and** real fundraising simultaneously.

Summary of Action Items

Item	Owner	Due Date
Decide whether to enroll	Shimon	ASAP
Connect with Yakov for confirmation	Shimon & Yakov	ASAP
Start Nonprofit Navigator training	Shimon	Upon enrollment
Begin initial fundraising activities	Shimon	Upon enrollment
Explore tutoring opportunities for income supplement	Shimon	Ongoing

Nonprofit Navigator Session — November 6

Recording: View Recording (110 mins)

Opening

Akiva Naiman:

Can you hear me?

Israel Katz:

Yes, I'm driving home.

Akiva Naiman:

Okay, that's weird — I guess there's no waiting room.

Israel Katz:

There was for a second. You can probably set it up in the settings. I thought you had.

Akiva Naiman:

Yeah, I'm trying to figure it out.

Israel Katz:

No worries. I'm glad to be here — but don't feel like you need me on every call. I'm just tuning in to hear what's going on and be available for questions.

Akiva Naiman:

Appreciate that.

(They troubleshoot the Google Meet settings for a minute.)

Participants Join

Yaakov Lazar:

Okay, I'm on.

Akiva Naiman:

Hey, Yaakov.

Israel Katz:

Hey, how's it going?

Yonasan Caller:

What's up?

Akiva Naiman:

Hi Meira, hi everyone!

Yonasan Caller:

Good to see you.

(They resolve a slight echo issue.)

Shimon Newman:

Good evening, everyone.

Intro: Setting the Stage

Akiva Naiman:

We're just waiting for one more person, but we'll get started regardless.

I'm excited to have two new organizations join today!

Before we dive in, let's quickly go around and introduce ourselves. Try to keep it to about 90 seconds each — name, organization, and what you do.

Introductions

Meira Cohen:

Hi, I'm Meira. I work for Stepping Stones Wilderness Initiative (SSWI), a nonprofit in Israel that provides nature therapy for at-risk teens. Akiva is the best — and this is a great program. Happy to be here!

Akiva Naiman:

Thanks, Meira. And congrats to Meira — she made her first pitch yesterday and secured a \$2,500 gift!

Yaakov Lazar:

I'm Yaakov Lazar, founder and director of Kol Haneshamot. We work with parents and families of teenagers at risk.

We guide parents on how to help their children, but we don't work with the teens directly — only with the families to support them holistically.

Shimon Newman:

I'm joining Kol Haneshamot as a future fundraiser. I made Aliyah about three months ago, and this course is my first step into the nonprofit world. I'm passionate about helping kids succeed before problems become crises.

Tani Polansky:

Hi, I'm Tani. I'm starting an organization called Tefilah Music, a nonprofit record label for emerging Jewish artists focused on Tefilah-centered music. It's meant to inspire the next generation, primarily in the Orthodox community, but broadly as well.

Yonasan Caller:

Hi, I'm Yonasan, living now in Ramat Beit Shemesh. I started an Amutah called J-Learn this summer

We connect top educators here in Israel with people in the diaspora for paid one-on-one Torah learning sessions. It helps people abroad access high-quality learning, and also supports educators financially here in Israel.

Sharing Successes and Challenges

Akiva Naiman:

Let's go around. Yonasan, can you start us off? Share one success you've had and one challenge you're facing.

Yonasan Caller

Success:

We launched J-Learn this summer, and it's moving from theory to practice.

We've set up several one-on-one learning sessions, and the feedback has been great — both mentors and mentees are happy.

Challenge:

The bureaucracy in Israel has been overwhelming. Every time I think I'm done, there's another hoop to jump through.

That's not the main reason I joined the course though — I'm mainly here to learn how to fundraise seriously.

Akiva Naiman:

Amazing. Was the good feedback from the mentees or mentors?

Yonasan Caller:

Both! Everyone's been happy. It's great to see the dream starting to work — even if I'm not making money yet, everyone else is winning, which is motivating.

Yaakov Lazar

Success:

We've seen real progress with the families we work with.

Some of the teenagers who were at severe risk are now healthier, attending school regularly, and reconnecting with their families.

Watching that transformation has been incredible.

Challenge:

Fundraising. We have a great program that works, but it's hard to fund it.

Helping a child at risk often requires expensive therapies, coaching, and interventions — and the parents are often financially drained already.

Akiva Naiman:

What's your biggest current expense for Kol Haneshamot?

Yaakov Lazar:

A home.

Right now, we don't have a dedicated location. We're operating out of my house and Zoom, but we really need a proper space for our support groups. Without it, it's harder to build a consistent community.

Akiva Naiman:

Got it. Later today we'll brainstorm ways to solve that — maybe through strategic partnerships.

Shimon Newman

Success:

I made Aliyah a few months ago and wanted to move into nonprofit work.

I started by calling everyone I knew. Through a chain of connections — one person to the next — I eventually met Akiva and Yaakov.

It feels like hashgacha (Divine providence) that I ended up here.

Challenge:

Fundraising is completely new to me. I've worked with families, students, and various stakeholders before — but asking for donations is a new skill I want to build.

Akiva Naiman:

Amazing attitude. Fundraising is a skill anyone can learn — it's just about getting comfortable with the conversations.

Tani Polansky

Success:

The feedback I've gotten about Tefilah Music has been overwhelmingly positive. People have been offering to join the team, volunteer, and support the mission.

Challenge:

My biggest hurdle is upfront capital.

Creating the music and experiences needed to inspire people requires about \$50,000 to get started.

It's a big lift because donors will need to understand the concept before they can experience it.

Akiva Naiman:

Absolutely. You're doing great. It's all about articulating the vision clearly and powerfully.

Meira Cohen

Success:

I'm still very new to fundraising, but I feel like I'm gaining the tools I need to get started.

Challenge:

There's definitely a mental block when it comes to pitching and asking for money. It feels daunting — but I know that with practice, it'll get easier.

Akiva Naiman:

Completely normal. We'll help you build that confidence step-by-step.

Reflections

Yonasan Caller:

I just want to say — it's inspiring to hear what everyone is working on.

I've been with Aish for nine years, but hearing all these different causes reminds me how many important needs there are in the world.

It's really motivating to be part of this group.

Akiva Naiman:

Thank you for sharing that. It's easy to get so busy building the course that I sometimes forget — **you** are the ones changing the world.

This is exactly why we're here: to help each other succeed in our missions.

Fundraising Training: "Always Be Connecting"

Akiva Naiman:

Let's jump into today's topic:

ABC — Always Be Connecting.

When it comes to fundraising, there's no magic pill... but if there *is* one simple rule that works, this might be it:

Always be connecting.

This doesn't mean you're always asking for money. It means you're always building relationships.

At a kiddush, at a wedding, on a casual phone call — talk about your nonprofit naturally. You never know where a conversation might lead.

Examples

Akiva:

- When I worked at NCSY in the Bay Area, I spoke about NCSY whenever it made sense.
- Meira recently connected with a high school mental health club just by sharing what she's working on — and that could turn into a huge opportunity.
- A simple casual mention can open doors you didn't expect.

Key Point:

You are not asking everyone for money.

You are inviting them into your story.

Coaching Yaakov (Kol Haneshamot)

Akiva to Yaakov:

For example, Yaakov, you're looking for a home to run your parent support groups. Are you asking your network for help finding *someone who knows someone*?

Yaakov Lazar:

Sometimes. I've asked a few people here and there.

Akiva:

Let's kick it up.

You should be telling everyone you know that you're looking — and asking them:

"Who do you know that might have an unused home in Israel?"

Think creatively:

- Property managers
- Airbnb owners
- Travel agents
 (They know wealthy people who own empty homes in Israel.)

Even the five of us on this call could start generating ideas for you!

Coaching Yonasan (J-Learn)

Yonasan Caller:

It's tricky because I wear two hats. I'm still working for Aish full-time, and they have guidelines for how I represent myself publicly.

Akiva:

Totally get it.

Same with me — I work at NCSY full-time.

That's why I don't post about Nonprofit Navigator publicly.

But you can still **privately** build an inner circle.

You could create a **small ambassador group** — teachers, educators, friends — who can share J-Learn on your behalf.

You're not promoting it directly — they are.

Key Takeaways:

- Always be connecting.
- Ask who your connections know.

Build quiet momentum even when you have public limitations.

Fundraising Mindset: Emotion > Information

Akiva Naiman:

Next key idea:

People won't remember what you say.
They won't even remember what you do.
But they'll always remember how you made them feel.

Fundraising isn't about information — it's about **emotion**.

When a donor feels inspired, hopeful, moved — that's what makes them give.

Practical Tips

- Use powerful images even simple ones.
- **Tell a story** that makes them feel something.
- Make it interactive don't just talk at them.

Coaching Meira (Stepping Stones)

Akiva to Meira:

For example, when you pitch Stepping Stones, don't just say:

"We help at-risk teens through nature therapy."

Instead, say:

"Picture a 15-year-old boy. He's failing out of school, isolating from friends, spiraling. Now imagine that same boy hiking through a canyon, looking up at the stars, hearing for the first time that he has infinite worth."

Make the donor *feel* the story.



- Emotions drive decisions.
- Data and information are important but they come *after* the emotional connection.

(STOPPING POINT)

Summary So Far:

- Introductions + Successes/Challenges
- Fundraising Training Part 1: Always Be Connecting
- Fundraising Training Part 2: Emotions > Information 🔽

Coaching: Immediate Fundraising Action Steps

Coaching Yonasan (J-Learn)

Akiva to Yonasan:

You mentioned you have a potential donor who's an entrepreneur — you spoke months ago, but never made a formal ask.

What's the plan?

Yonasan Caller:

I was thinking about reaching out, but I'm not sure if it's too soon.

Akiva:

It's not too soon. If anything, it's late.

Here's your script:

1. Send a quick text:

"Hey [Name], it was great seeing you the other day. I'm moving things forward with J-Learn and would love to set up a time to share where we're holding and explore if you'd like to be part of it."

- Schedule a meeting for 2–3 weeks out (to give yourself time to practice your ask).
- 3. In the meeting, lead with:
 - Updates on success stories.
 - Big vision for impact.
 - THEN ask: "Would you consider supporting us at the \$10,000 level?"

Yonasan:

Got it. I'll reach out tonight.



Always schedule the next step.

Waiting kills momentum.

Coaching Yaakov and Shimon (Kol Haneshamot)

Akiva to Yaakov:

You have a real goldmine — 75–100 families who have personally benefited from your organization.

You need to start expanding outward:

• Option 1:

Organize a **Friends of Kol Haneshamot Day** — a hackathon where parents introduce you to 3–5 friends each.

You'll build a fresh donor list fast.

• Option 2:

Launch a small **monthly broadcast list** (WhatsApp or email) where you send tiny updates — not big newsletters — just 2–3 lines of good news.

Example:

"This month, 4 families graduated from our support program, and 2 teens re-enrolled in school!"

No ask — just touch points.

You stay top-of-mind.

Key Takeaway:

Your best donors are your current fans.

Activate them!

Coaching Meira (Stepping Stones)

Akiva to Meira:

You closed your first donation! Amazing.

Here's what to do next:

1. Follow up immediately.

Send a sincere thank you (text + email).

You did it perfectly!

2. **ABC**:

Ask the donor:

"Is there anyone else you think would be passionate about what we're doing?"

3. Start building your Florida base:

You already have one high-profile intro coming (Ivanka Trump's family!) — build around that.

Meira:

Yes, I'm working on it. It's still a little scary.

Akiva:

That's normal. Remember:

You're not asking for yourself.

You're inviting them to partner in something bigger.

Key Takeaway:

Always ask happy donors for referrals.

That's where growth comes from.

General Group Discussion

Bureaucracy Issues (Israel Legal Stuff)

Yonasan:

Setting up a 501(c)(3) in America — should I do it myself or hire?

Akiva:

Options:

- **DIY:** \$200–\$300 but a massive headache.
- **Hire an expert:** About \$1,100 (worth it if you value your sanity).

If you have a big U.S. donor coming soon (like your \$10K prospect), **hire.**If not, wait and use a fiscal sponsor temporarily (5% fee, but fast and easy).

Yaakov:

Same with Kol Haneshamot — we're still under a fiscal sponsor for now.



Use a fiscal sponsor short-term.

Set up your own nonprofit once you're ready to scale.

Wrapping Up: Takeaways from Each Person

Final Reflections

Yonasan Caller:

"My mind is racing with ideas. Excited to move forward."

Meira Cohen:

"Feeling empowered — and much less scared to ask."

Yaakov Lazar:

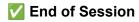
"Glad I joined this group. Already learning a ton."

Shimon Newman:

"Validated that this is the right place for me to grow as a fundraiser."

Akiva Naiman:

"You're all working to change the world. It's an honor to help you do that."



Meeting Notes: Impromptu Zoom Meeting - November 13

Recording: Watch Recording (112 mins)

Attendees

- Akiva Naiman (Facilitator)
- Kol Haneshamot (Shimon Newman and Yaakov)
- Adele Lerner (YTA)
- Meira Cohen (Stepping Stones Wilderness Initiative)
- YC (JLearn)

Agenda

- 1. Welcome and Introductions
- 2. Finding More Time in Your Day Tips
- 3. Organizational Updates and Coaching
- 4. Troubleshooting Current Challenges
- 5. Action Items and Wrap-Up

Highlights

1. Finding More Time in Your Day

Dream Big, Start Small:

Aim high but grow step-by-step based on available resources (staff, time, donors).

- Key Constraints to Remember:
 - Staff size limits organizational speed.
 - Time is fixed—pace growth appropriately.
 - Limited donors at early stages; patience is key.
- Practical Time-Saving Tips:

- 10-Minute Rule: If a task takes more than 10 minutes and isn't core to your role, delegate or find a faster method.
- **Use AI:** For tasks like data scraping, donor research, and basic design.
- Outsource: Platforms like Fiverr and Upwork are excellent for graphic design, pitch decks, etc.
- Automate: Automate receipts, onboarding emails, CRM workflows wherever possible.
- Hire a (Virtual) Assistant: Even part-time help can free up major time (e.g., 10 hours/week).

Helpful Tools:

- Fiverr / Upwork Outsourcing platforms.
- Hatch.Al / Atlas / DonorSearch Al tools for donor research.
- o **Instrumentl.com** Grant searching (not as helpful in Jewish space).

2. Organizational Updates

Kol Haneshamot

- Planning a crowdfunding campaign around Hanukkah with a \$100,000 goal.
- Key Focus: Finding a "home base" (house rental).
- Need at least 50 committed ambassadors for campaign success.
- Discussed leveraging participants' families and broader network for support.

JLearn

- Working on building a strong ambassador network for international reach.
- Need for clear messaging: Focus on either (1) helping mechanchim stay in chinuch or (2) providing Torah learning to busy young professionals — NOT both at once (keep the mission sharp and focused).
- Dan (potential donor) was contacted; follow-up planned.
- Identified need for a future marketing budget for targeted paid advertising.

YTA (Adele)

- Campaign goal: №100,000-№150,000 (~\$27,000-\$41,000).
- Planning peer-to-peer fundraising through staff and students.
- Facing internal resistance from staff toward fundraising participation.
- Solution brainstorm: Instead of forcing staff to fundraise, offer them ways to support the campaign (e.g., helping with logistics, outreach, hosting events).

Stepping Stones (Meira)

- Focus: Overcoming the fear of "asking."
- Strategy: Practice pitching regularly, even to friends and family.

- Built a growing lead list (~37 leads so far).
- Key Next Step: Improve data tracking of leads and donor interactions in CRM.
- Always "ABC" Always Be Connecting even casually.

3. Key Coaching Points

- Always Be Connecting (ABC): Constantly make new connections; even casual interactions can lead to major opportunities.
- **Focus on Niching Down:** Solve one clear problem for one clear audience to make fundraising easier and more powerful.
- Clarity Before Fundraising:
 - o Nail down mission, vision, and budget projections.
 - o Develop strong "Why" messaging.
- Crowdfunding Tips:
 - o Start ambassador recruitment early.
 - Coach and support ambassadors throughout the campaign.
 - Structure matching sponsorships (Gold/Silver/Bronze levels) to inspire larger gifts.

Action Items

Person	Action
Adele	Engage staff creatively in campaign support; prep for 24-25 Dec campaign.
Kol Haneshamo t	Begin ambassador recruitment; explore renting house in Beit Shemesh area; start donor conversations.
JLearn (YC)	Finalize mission focus; follow up with Dan; work through Module 1 to clarify vision and financial targets.
Meira	Keep practicing pitches; track lead interactions; follow up with referrals immediately; set up CRM reminders.
Akiva	Follow up with potential house donor (Alan P.) for Kol Haneshamot; continue coaching support.

Reminders

- Next session: Continue progress on Module 1 and donor conversations.
- Fathom meeting recording posted in the Member Portal.
- Always track outreach and follow-ups to maximize future success!

Impromptu Google Meet Meeting Summary – November 27

Recording: Watch (117 min)

1. Key Topics Covered

Fundraising Tools

- Zoom AI, Firefly, Otter.ai: Tools for automatic meeting transcriptions and summaries.
- Fiverr / Upwork: Outsourcing pitch deck design, websites, admin work cheaply and efficiently.
- Canva / Fiverr for Design: Don't overpay (\$800) for a pitch deck; \$400 high-quality decks are available.

2. Fundraising Strategy: The "FUN" Acronym

(Akiva's coaching framework)

Letter	Concept	Key Points
F	Focus on the Cause	Find alignment between donor values and organization. Know the cause deeply: stats, niche, and what makes it unique.
U	Understand Rejection	Rejection is normal. Every "no" brings you closer to a "yes." Always learn why a donor says no.
N	Nurture Relationships	Steward donors year-round. Use systems (mass texting/emailing) to automate updates and communication.
D	Develop Confidence	Nonprofit work changes the world. Fundraising is a long-term process, not a sprint. Stay resilient after setbacks.

3. Yaakov Lazar's Campaign Strategy

Challenge

- Planning a fundraising campaign to open a support center for struggling teens.
- Concerned about losing current momentum if the project is delayed.

Coaching Advice

- Raise matching funds immediately, taking advantage of end-of-year giving season.
- Delay public fundraising campaign until March (around Purim) for better preparation and larger impact.
- Consider more cost-effective options for a center, such as buying a caravan instead of renting a house.
- Consistency matters: Even temporary rentals allow programming to restart and demonstrate stability.
- Focus on long-term stability rather than short-term fixes.

4. Shimon Newman Practice Pitch

Scenario: Pitching Rav Kornfeld to secure a matcher's donation via Tzvi (TZ), a wealthy South African donor.

Feedback

- Storytelling was excellent (twin brother saving sister's life story).
- Improve urgency and specificity:
 - Emphasize that programming has stopped, parents are asking for help, and immediate funding is needed.
 - Be clear on exactly how much money is needed, for what purpose, and what the next steps are.

5. Yonasan Caller – Dan Meeting Preparation

Goal: Turn a potential small donation into significant seed investment for JALEN (Jewish educators' support project).

Plan

- Prepare questions about Dan's philanthropic interests and goals to find alignment.
- Practice conversational pitch focused on the Jewish education crisis.
- Collect testimonials from teachers helped by JALEN.
- Gather statistics about the Jewish educator shortage and pipeline crisis.
- Prepare a specific proposal:
 - Marketing company quote.
 - o One-pager summarizing the need and vision.
 - Specific ask (\$9,600–\$18,000) framed as "seed funding."
- Meeting strategy:
 - o Open with compliments (he responds well to them).
 - o Build emotional and value alignment.
 - Tell a strong story.
 - o Present a clear, specific ask.
 - Pause and allow him to respond.

Action Items

Owner	Task	Due
Yaakov Lazar	Meet with Yisrael Katz regarding fundraising strategy	Tomorrow
Yaakov Lazar	Start calling potential matchers	Immediate
Shimon Newman	Practice urgent, confident pitch for potential matchers	Immediate
Yonasan Caller	Prepare for Dan meeting (one-pager, marketing quote, pitch)	Before Wednesday
Yonasan Caller	Research statistics on Jewish educator crisis	Immediate
All Participants	Focus on long-term sustainability; avoid short-term fixes	Ongoing

Major Takeaways

- December is the ideal time to secure matching donations.
- Having a rented location, even temporarily, can show stability while planning for a permanent home.
- Fundraising success is based on consistency, relationship nurturing, and long-term thinking.
- Pitches should always emphasize urgency, specificity, and alignment with the donor's values.

Impromptu Google Meet Meeting Summary – December 4

Recording: Watch (82 min)

1. Key Topics Covered

Meeting Overview

- Session focused heavily on coaching and fundraising techniques.
- Akiva had a flight, so the meeting ended slightly early.
- Participants included Yaakov Lazar, Shimon Newman, Yonasan Caller, Meira Cohen, and Akiva Naiman.

2. Yonasan Caller: Dan Meeting Debrief

Successes

- Prepared thoroughly using Module 1, AI, and Akiva's guidance.
- Created a strong one-pager and comparison table showing JALEN's unique value.
- Pitched effectively: Built rapport, personalized the ask, shared urgent and emotional stories about the Jewish educator shortage.
- Dan responded very positively: Animated, excited, expressed strong interest in JALEN.
- Asked for \$20,000 to fund initial marketing and setup.

Challenges

- Dan questioned whether JALEN should be a nonprofit or a business.
- He prefers investing in for-profit models (similar to MasterClass).
- Wants to ensure the project has "big names" before large marketing spend.

Next Steps

Follow-up meeting scheduled for Sunday.

- Explore balancing **business vs nonprofit** structure.
- Discuss whether having high-profile personalities is feasible or aligned with JALEN's mission.

Coaching Tip:

Even if Dan does not donate, he can become a long-term supporter, board member, or advisor. Stay close to him.

3. Shimon Newman: Networking and Fundraising Expansion

Current Focus

- Identifying and contacting past donors.
- Scheduling meetings with new contacts like Hillel Falk.
- Building out network beyond Canada, expanding into U.S. Jewish philanthropic spaces.

Coaching Advice

- Before meetings with busy people like Hillel, send a 24-hour heads-up email with:
 - Purpose of the meeting.
 - Specific fundraising needs (\$5,000+ level).
 - Request for contacts or introductions.

4. Meira Cohen: Donor Research and First Major Ask

Progress

- Learning to use **GuideStar**, **InstrumentI**, and **Hatch.ai** to find foundations.
- Researching Jewish and Israel-focused donors supporting mental health and at-risk vouth.
- Practiced pitching larger gifts confidently.

Coaching Advice

- Specific, urgent, emotional language in the pitch.
- Ask with confidence: When approaching wealthy donors, undershooting the ask can backfire.
- Prepare to ask a family friend (luxury car owner) to **sponsor 5 scholarships** (\$25,000 total) or **at least 1 scholarship** (\$5,000).
- Remember: The discomfort is yours, not the donor's.

5. Yaakov Lazar: Quick Meeting Strategy

Debrief

- Met with a past donor but did not make an ask due to short meeting time and donor's tone.
- Instead, planted the seed for a future ask.
- Scheduled a follow-up.

Coaching Advice

- In fast meetings, always ask for more time if possible instead of delaying the ask.
- Avoid missing opportunities by waiting too long.

Action Items

Owner	Task	Due
Yonasan Caller	Follow-up with Dan, clarify nonprofit vs business model	Sunday
Yonasan Caller	Identify 3 more donors to ask for \$500–\$1,000 gifts	Immediate
Shimon Newman	Meet Hillel Falk, request contacts and support	December 12
Shimon Newman	Reach out to Yo Zegelbaum on LinkedIn	Immediate
Meira Cohen	Prepare and make \$25,000 scholarship ask	Immediate
All Participants	Continue using GuideStar, Hatch, and Instrumentl for donor research	Ongoing

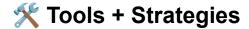
Meira Cohen	Watch Hatch.ai tutorial	Immediate
Shimon Newman	Introduce Shimon to Aaron Kohn for local donor connections	Immediate
Shimon Newman	Send Akiva pitch deck via WhatsApp	Immediate

Major Takeaways

- Thorough **preparation builds confidence** and creates better outcomes.
- Urgency, emotion, and specificity are key to effective fundraising pitches.
- **Prospecting new donors** through foundation research, LinkedIn, and gala donor lists is crucial.
- Always make the ask when you have the opportunity; delays often lead to missed chances.
- **Dream big**: Asking for \$20,000 or \$25,000 is realistic when meeting with high-net-worth individuals.

Nonprofit Navigator Weekly Coaching – December 18

Recording: View Here (104 mins, no highlights)



Donor Research:

- Use nplx.run/search Al tool for real-time donor research (free, no login needed).
- DonorSearch Access: Everyone received access to DonorSearch. If you missed it, reach out to Akiva.
- DS Ratings (Donor Search Scale):
 - DS1-1: High wealth, high philanthropy. (Top donors.)
 - o **DS1-2**: High wealth, philanthropy unknown.
 - o **DS1-3**: Wealthy (millionaire) but less philanthropic data.
- Use **GuideStar** to research foundations from 990 forms.

Bonus Tip:

Millionaires often give more generously than billionaires. Focus on *generous millionaires*, not flashy billionaires.



Finding Donors:

- Federation Reports: Jewish Federations and local Jewish newspapers often publish donor lists
- Al Search: Plug donor names into nplx.run/search to find philanthropy history and contact information.

Reminder:

Research donors quietly. Never tell them "I researched you." Instead, say you "noticed their involvement" or "read about their passions."

C Fundraising Mindset

Text vs. Call:

- Fundraising is **emotional** emotions don't come through texts.
- Always aim for a phone call or in-person meeting when possible.

Use the SUE Method When Asking:

- Specific
- **U**rgent
- Emotional

Spiritual Side:

- Balance **Hishtadlus** (effort) and **Bitachon** (faith).
- Suggested mindset:
 - "Thank you Hashem for the donors who are coming."

Mathematical Building Your Pipeline

Focus Areas:

- Start with low-hanging fruit: past donors, friends, warm contacts.
- Always Be Connecting (ABC): When you ask for a gift, also ask for introductions.
- Small gifts (\$50-\$500) are valuable. Build momentum.

Key Tip:

Find donors passionate about your *cause* **and/or** *you* personally. (Refer back to the 4 donor types.)

Remember:

- Phone call is best.
- Follow-up every 3–4 days if needed.
- Ask early in conversation don't wait for "perfect timing."

Campaign Prep (January CauseMatch)

Timing:

• New date: **Week of January 26** (Moved to avoid clashing with Akiva/Shevah campaign.)

WhatsApp + CRM Strategy:

- Use the free CRM tool in Nonprofit Navigator to send personalized mass WhatsApp messages.
- \$30 one-time fee for WhatsApp broadcast setup.

Marketing (Social Media Best Practices):

- Make posts **specific** to your audience.
- Offer immediate value (example: "One tip for parents of struggling teens").
- Use numbers and clickable titles ("3 ways to help your struggling teen today").

Example Post Upgrade:

Instead of vague quotes →
 Start with a problem statement (ex: "When a teen is struggling, parents often feel hopeless.")

Then offer one action step and show how your organization helps.

Format Tip:

• Make it crystal clear who the post is for and what they get.

lndividual Coaching Highlights

Meira (Stepping Stones):

- Win: Got a potential \$5,000 donor in motion.
- Focus: Push for phone calls, not texts. Don't rush stay humble but consistent.
- Takeaway: "Pressure is normal stay calm, stay humble."

Yonasan (J-Launch):

- Win: New fiscal sponsor set up (ZTE) for U.S. tax receipts.
- Focus: Tap personal donor list. Start with smaller donors to build momentum.
- **Takeaway:** "Balance Bitachon and Hishtadlus. Be excited about who Hashem is sending."

Yaakov & Shimon (Kol Haneshama):

- Win: Found passionate new contact (past \$500 donor, passionate about mental health).
- Focus: Invite passionate donors to become ambassadors.

• Takeaway: "It takes a village — phone calls daily are the game changer."

○ Favorite Quotes

- "Give me a generous millionaire over a stingy billionaire any day."
- "Fundraising is emotional. Texts can't convey emotion phone calls can."
- "You can't do this alone. Build a team of passionate ambassadors."
- "Thank you Hashem for the donors who are coming."

Nonprofit Navigator Weekly Coaching – December 25

Recording: View Here (105 mins, no highlights)

🚀 Big Picture

- **Session Focus**: Q&A style, hands-on coaching on live asks, donor stewardship, and campaign prep.
- Note: No session next week (vacation) return after Chanukah.

X Tools + Strategies

Three Keys to a Successful Ask

(Practice these every time):

- Specific
- Urgent
- Emotional

Donor Stewardship Tip:

- Always send thank you emails immediately after a pledge.
- Include **three ways to give**: (1) online link, (2) mailing address, (3) EIN number for donor-advised funds (DAFs).

Google Alerts:

- Free tool to track donors online automatically.
- Get notified when your donor's name appears in news or blogs perfect for real-time stewardship.

Email Subject Line Tips:

- "Time to Meet?" gets high open rates.
- "You're Invited!" great for event invites.
- When following up on a donation:
 - Use "Time-Sensitive" + short, respectful nudges.
 - Always make it easy for them to act (donate links, clear instructions).

Real Coaching Highlights

Yaakov (Kol Haneshama):

- Challenge: Preparing to ask a donor for \$18,000.
- Strategy: Instead of framing the gift as "marketing costs," frame it as saving lives urgent, emotional, transformational.
- Bonus Tip: Don't sell logistics; sell impact.

Adam (New Navigator Student):

- **Joined the course** to pivot into nonprofit work.
- Learning Focus: Master fundraising as a critical skill.

Meira (Stepping Stones):

- Wins:
 - Secured businesses rounding up purchases to donations.
 - Progressed from texting to live phone calls.
- Upcoming:
 - Preparing a presentation to secure \$10,000-\$40,000 donations from a founder's siblings.
 - o Building her comfort zone working with both women and men.
- New Idea: Possibly create a "Women in Nature" WhatsApp community to connect businesswomen around Stepping Stones' mission.

Yonasan (J-Learn):

- Wins:
 - New intern (after the first fizzled out).
 - Two new meetings booked with potential donors (Isroel and Jake).
 - Expanding personal network using fundraising skills at casual opportunities (like after Maariv).
- Challenge:
 - o Dan (prospective big donor) showed excitement but hasn't donated yet.
- Advice:
 - Remember: fundraising is a long game.
 - Stay respectfully persistent.
 - Use the formula:
 - "We need X dollars by Y date to do Z impact."

Shimon (Kol Haneshama):

- Win:
 - First independent donor ask = \$1,000 pledged! (Aiming for \$1,800).
- Next Steps:
 - Secure more ambassadors for CauseMatch.
 - Focus outreach now, but understand many foundations are slow/end-of-year closed.
- Advice:
 - Focus on securing major matchers first.
 - For smaller asks, **volume wins** more ambassadors = more dollars.

Israel Katz (Guest Coach):

- Reminder:
 - Always provide value in any WhatsApp group initiative.
 - Avoid random groups; deliver unique content people actually want.

© Key Concepts

- Fundraising = Specific + Urgent + Emotional.
- Persistence wins, but must be respectful of the donor's emotional state.
- Follow-up = professional + grateful + simple to act.
- Focus: Get ambassadors committed early to boost CauseMatch success.
- Always Start With Why: (For example, why you created your organization, not just what you do.)
- ABC = Always Be Connecting: Every donor, volunteer, or contact can open new doors.

Favorite Quotes

"Millionaires give more than billionaires."

"Fundraising is emotional. If it's not emotional, it's not fundraising."

"We need X amount of dollars by X date to do X — that's the entire game."

"Persistence respectfully done will always outperform patience alone."

"The riches are in the niches."

Impromptu Google Meet Meeting — January 8

Recording: View Recording (106 mins)

1. Opening Personal Updates

- Akiva Naiman and Yaakov Lazar discussed personal health updates. Yaakov had pneumonia, and Akiva encouraged him to take it seriously and take care of his health.
- They joked about flu shots and aging, then shifted to fundraising topics.

2. Fundraising Updates

Akiva asked Yaakov for an update on a potential \$18K donor.

- Yaakov: Some donors are hard to reach; meetings are delayed. One prospect is unresponsive — Yaakov might reach out to a family member to check in.
- Akiva: Push harder. Treat it like a life-and-death situation. Follow up more than once a week.

Advice from Akiva:

- Text the donors urgently. Frame it as a critical situation needing immediate action.
- Set a goal to send all the texts by tonight or early tomorrow.

3. Participant Introductions

- Bassie Heller: Rejoining the program after a break. No current fundraising cause but open to finding one.
- Yonasan Caller: Founded Jayland, a nonprofit matching mekhanchim with learners globally to provide income streams for educators in Israel.
- Shimon Newman: Joined Kol Haneshama, an organization supporting Anglo families in Israel with teens at risk. Provides family coaching, support groups, and plans to expand services.

4. Story of a Donation — Bassie Heller

Bassie shared how she secured a \$5,000 monthly pledge:

- It was through her brother.
- Initially, her brother hesitated but agreed to give \$5K for the first month and "see how it goes."
- The communication was unclear, leading to awkwardness about future payments.
- They clarified expectations over a phone call, and he agreed to continue monthly on a casual basis.

Key Lessons from Akiva:

- Always clarify the donation terms on the spot.
- Follow up within 24 hours by email summarizing the agreement.
- Steward donors by sending simple updates (like pictures or short notes).
- Never assume what a donor is thinking ask.

5. Updates from Yonasan Caller

- Good news: After persistent follow-ups, Yonasan received a \$1,000 donation from a donor named Dan.
- **Persistence:** Yonasan nearly gave up but followed Akiva's advice be patient and push when needed.
- Other wins: Another smaller donor (\$36) made an additional \$54 donation independently and signed up for learning sessions.

Advice from Akiva and Yisroel Katz:

- Patience and persistence are crucial.
- Treat every donor, even "small fish," as valuable their support can be transformative for a small organization.
- Set up a coffee meeting with the new potential donor and position \$5K-\$10K gifts as critical to the organization's survival.

6. Updates from Shimon Newman (Kol Haneshama)

Successes:

A past donor (who previously gave \$360) spontaneously donated ₪1,800 (~\$500).

Another donor attempted a **□360** donation but a technical issue only processed
 ■36. Shimon is following up to correct it.

Challenges:

 Difficulty converting a potential ambassador in Teaneck who wants more information about the organization.

Akiva's Coaching:

- Send a follow-up email to every donor summarizing the conversation and re-affirming the mission.
- For the Teaneck potential ambassador: arrange for him to speak to a client anonymously (without video if needed).
- Identify therapists or mental health professionals in the Beit Shemesh area who could become ambassadors.

7. Fundraising Tools Shared

 Akiva shared an Al Tools List to help with workflow and a Major Donor Checklist to assess if someone is a high-potential prospect.

8. Final Notes

- Importance of **building relationships** and **long-term stewardship** with donors, especially when they face hard times.
- Focus 80% of time on the top 20% of donors.
- Continue pushing with current prospects while broadening outreach.

Key Action Items

- Yaakov: Text donors tonight with urgency.
- Bassie: Follow-up properly and confidently steward brother's gift.
- Yonasan: Set a meeting with the new potential donor after Maariv.

Impromptu Google Meet Meeting — January 15

Recording: View Recording (100 mins)

1. Personal Updates

- Akiva Naiman shared he resolved a contract miscommunication and is relieved.
- Akiva and Yaakov Lazar noted that attendance was low and decided to move forward with their coaching session.

2. Fundraising Follow-Up — Yaakov Lazar

- Yaakov reported that he made phone calls over the weekend but no meetings have closed yet.
- Akiva pushed Yaakov to think about urgency:
 "If I paid you a million dollars, could you get it done by the end of the week?"
 - Yaakov admitted he struggles with needing validation that he's "on mission."

3. Practice Pitch — Yaakov Lazar

Yaakov's pitch:

- Kol Haneshama works with parents of teens at risk.
- Through parent coaching, they teach parents to be first responders to their children's needs.
- It's a long but successful process to save lives.

Success Story Shared:

- A 15-year-old girl at severe risk (drugs, alcohol) was turned around after three months of working with her parents.
- Daughter recognized the change in her mother's behavior and told her: "Tell them they saved my life."

• Now, 1.5 years later, she is healthy, off drugs, back in school, and frum (though religious observance was not the primary goal).

4. Measuring Success

- Parents' emotional states during sessions.
- Children returning home at night instead of staying out.
- Re-engagement with school.
- Building safe emotional relationships between children and parents.

5. Challenges from the Past Year

- Lost their home base due to funding and leasing issues.
- Inconsistent meeting locations led to a drop-off in support group attendance.
- Goal for the next year: Establish 4 different support groups:
 - 1. Couples
 - 2. Mothers
 - 3. Fathers
 - 4. Siblings

6. Fundraising Strategy

- Planning a CauseMatch campaign.
- Need to secure matching funds and marketing material.
- **Immediate need:** 36,000 shekels for marketing expenses.
- Long-term goal: Raise 300,000 shekels to run the program for 6 months.

7. Coaching Feedback — Akiva's Key Points

- Lead with emotion. Start with a powerful story.
- Stay focused. Talk about the kids and parents, not logistics.
- Keep it simple.

Pitch should have only 3 points:

1. Emotional story.

- 2. We need to urgently expand to 4 support groups.
- 3. It will cost 300,000 shekels today I'm asking you for 36,000.
- Pause after asking. Don't over-explain.
- Prepare 3–5 clear bullet points for measuring success.

8. Practice Ask — Yaakov

- Delivered an improved ask:
 - Told the emotional success story.
 - Clearly stated the 300,000 shekel goal.
 - o Asked for a 36,000 shekel donation.

Feedback:

- Much stronger delivery.
- Need to continue smoothing delivery and show more confidence.

9. Additional Coaching for Yaakov

- Be transparent with numbers how much does each family cost, staff salaries, etc.
- Always pay yourself first sustainability matters.
- Don't lower yourself emotionally during the ask you are offering a gift to the donor
 by giving them the opportunity to help.

10. Strategy Session — Yonasan Caller

- Feeling overwhelmed with work and fundraising.
- Started building a stewardship list for future donors.
- Akiva advised creating a WhatsApp broadcast list using Al tools to manage contacts.
- Suggested a workflow:
 - o One phone call a day to a potential donor or steward an existing one.
 - Weekly WhatsApp updates to stay visible to his network.

11. Coaching Session — Bassie Heller

- Bassie explored his passion: Helping people feel seen, loved, and valued.
- Discussed difficulties moving from thought to action.
- Yonasan encouraged him to:
 - Write a list of practical steps he could take this week.
 - Start exploring hands-on experiences like visiting patients or mentoring teens.
- Emphasis on moving from **potential** to **practical action**.

12. Action Steps for Next Week

Participant Action

Yaakov Lazar Close at least one donor meeting by next Wednesday.

Yonasan Caller Make five donor phone calls this week.

Bassie Heller Write down three concrete action steps to explore practical

experiences.

Closing Words:

- No progress comes from inaction.
- Start somewhere no step is too small.
- Everyone is rooting for each other's success.

Meeting Notes: Impromptu Google Meet - January 22

Duration: 115 minutes | **Recording:** Link

Attendees

- Akiva Naiman
- D. Gross
- Yaakov Lazar
- Shimon Newman
- Adam Alsberg
- Bassie Heller

Introductions

Each participant briefly introduced themselves and their organization:

- Yaakov Lazar: Founder of Call of a Shmoat supporting parents of teens at risk.
- Shimon Newman: Working with Yaakov Lazar.
- Adam Alsberg: Fundraising for *ECP* (*Emerging Career Professionals*), focused on Jewish young professionals in NYC.
- **D. Gross**: Working with *MSI Muncition Initiative* (advocating for Muncie girls) and *Tri-Sial* (supporting older singles across North America).
- Bassie Heller: Exploring career opportunities, considering entering the fundraising field.

Key Topics Covered

1. Fundraising Pitch Coaching

- Focus on pitches being specific, urgent, and emotional.
- Importance of creating an emotional connection when communicating with donors.
- Loneliness is a strong emotional angle, especially for programming related to singles.

2. Fundraising Tools and Al

- **Al Tools** shared by Akiva: GPTs for writing donor emails, fundraising pitches, newsletters.
- Example: Akiva used Al to create the Kahoot quiz based on module 4 fundraising content.

3. Yaakov Lazar's Fundraising Update

- Successfully secured a \$5,000 donation.
- Discussed the importance of continuous emotional updates to donors (stories, impact reports).
- Reminder to consistently connect with donors over the next 6–12 months to increase future giving.
- Key point: People make emotional, not rational decisions when giving.

4. D. Gross – Welcome Bag Sponsorship Strategy

- Planning a Shabbaton for singles and seeking a \$2,800 sponsor for welcome bags.
- Strategy discussed:
 - Frame the sponsorship opportunity emotionally by emphasizing loneliness and inclusion.
 - o Aim to ask for \$5,000 instead of \$2,800 to establish a major donor relationship.
 - Offer additional exposure (e.g., sponsor area in newsletters) to increase perceived value.
 - Approach donor by first building rapport, then offering the package deal.
 - o If donor offers less than \$5,000, accept partial sponsorship for the newsletter but reserve the full bag sponsorship for a larger donor.

5. Adam Alsberg – Emerging Career Professionals (ECP)

- ECP will focus on Jewish young professionals in Manhattan (ages 21–30).
- Plan to build new programs and partner with existing organizations.
- Discussion about creating an app/website to aggregate events and opportunities.
- Reminder: Past attempts at similar platforms failed due to lack of user engagement; must deliver real and immediate value.
- Fundraising suggestion: Create a compelling pitch for six-figure funding by emphasizing the platform's scalability and potential reach.

6. Bassie Heller - Career Exploration

- Discussed three options Bassie is considering:
 - Get involved with a local yeshiva (e.g., Ohr Yisroel).
 - Develop mindfulness programming for small groups.
 - Explore nonprofit work combining mentoring, support, and fundraising.
- Group consensus:

- Bassie's strength lies in personal connection, warmth, and one-on-one interactions.
- Recommendation: Find an organization where she can combine fundraising with direct impact (e.g., mental health support or mentoring).
- Suggested next step: Arrange short-term internships or volunteering roles with organizations of interest to gain experience.

Key Reminders

- Next session will be in two weeks due to Akiva's son's bar mitzvah.
- Homework:
 - Yaakov: Send emotional follow-up texts to pending donors.
 - o **David**: Approach sponsor as discussed, update the group on progress.
 - o **Bassie**: Reach out to organizations to begin real-world experience.
 - Adam: Continue working through course modules and practice fundraising pitches on small donors.

Action Items

Participant	Action Item	Due
Yaakov Lazar	Send emotional donor updates and pursue pending asks	ASAP
D. Gross	Approach potential sponsor for Shabbaton welcome bags, using outlined strategy	Before next meeting
Bassie Heller	Reach out for internships/volunteer opportunities with organizations (e.g., mindfulness, at-risk youth)	Within 3 weeks
Adam Alsberg	Complete modules 1–4, begin drafting fundraising pitches, explore small donor asks	Before next meeting

Impromptu Google Meet Meeting - February 5

Recording: Watch Here (121 min)

Attendance

- Akiva Naiman
- D. Gross
- Adam Alsberg
- Yonasan Caller
- Adam Lombardo
- Shopsie (A.K.)
- Aharon Brejt (joined later)

Welcome & Introductions

- Akiva opened the meeting, welcomed everyone, and explained the format: brief teaching, then coaching.
- Adam Alsberg: Working on ECP (Emerging Career Professionals) with OU, doing marketing for a kosher distillery.
- **Yonasan Caller**: Founder of J-Learn, helping *mashgichim* in Israel earn parnassa through paid teaching.
- Adam Lombardo: Learning in Kollel in French Hill, Jerusalem. Fundraising for future Jewish leaders program.
- **D. Gross**: Running a shidduch initiative based in New Jersey.
- **Shopsie (A.K.)**: New to the group, representing an organization helping families with special needs through volunteer networks and a services database.
- Aharon Brejt (joined later): Starting a nonprofit called "Aliyah Fund," aiming to fund Torah-related projects.

Quick Walkthrough: Nonprofit Navigator Platform

 Akiva reviewed how to navigate the learning platform, find modules, and use available course files.

Main Workshop: Using ChatGPT to Solve Fundraising Challenges

Each participant identified a current challenge and used ChatGPT to brainstorm solutions.

Examples:

- Akiva's Challenge: Low RSVP numbers for an NCSY event.
 - ChatGPT suggested sending a second round of mass texts, making RSVP easier (e.g., "Reply YES to RSVP").
- Adam Lombardo's Challenge: Building donor relationships from Israel.
 - Takeaway: Tailor content to match donor interests; refine messaging.
- Adam Alsberg's Challenge: Fundraising for ECP while managing communication with the OU.
 - Takeaway: Ask for a structured meeting to organize questions efficiently.
- Yonasan Caller's Challenge: Donor/client "dry spell."
 - Takeaway: Spend 10 minutes daily doing targeted donor outreach to maintain momentum.

Accountability Plan

- Akiva encouraged everyone to pick one daily action based on their ChatGPT session.
- Suggested peer accountability: partnering with each other or posting updates in the group chat.

Individual Coaching Sessions

Adam Lombardo

- Celebrated success of recent campaign (\$150K raised).
- Focus: Build long-term relationships with larger donors.
- Homework:
 - Identify four-digit donors.
 - Find out who solicited them and their giving motivations.
 - o Develop a stewardship plan to engage them beyond campaigns.
 - Watch Orientation and Module 1.

Yonasan Caller

- Update: Recent illness slowed progress, but had prior success in donor/client outreach.
- Focus: Prepare for a key donor meeting next week.
 - Strategy: Spend most of the meeting building relationship first.
 - Goal: Ask for \$9,250 (specific and realistic ask).
 - Tip: Align the donor's passions (media/podcasting) with J-Learn's mission.

Additional lead: Follow up through in-laws to reach Daniel Lyons.

Adam Alsberg

- Focus: Communicating with Sarah at OU about fundraising involvement.
 - Strategy: Politely propose meeting or emailing structured questions.
 - o Important Mindset: Passion vs. pestering confident outreach brings value.
 - Backup Plan: Explore MJE opportunity if OU does not move forward.

D. Gross

- Preparing for major donor family meeting.
- Focus:
 - Build urgency: Organization is moving from survival to thriving.
 - Create emotional connection: Frame the impact on shadchanim and singles.
 - Homework:
 - Finalize pitch deck.
 - Clarify who will make the ask.
 - Do deeper research on the family.
 - Prepare monthly giving options, not just one-time gifts.

Late Joiner: Aharon Brejt

- Introduced "Aliyah Fund," aimed at helping Torah initiatives including:
 - o Parsha playlists (curated music tied to weekly Torah readings).
 - Weekly divrei Torah publication.
 - Shabbos atmosphere initiatives at BMG.
- Discussed beginning stages of clarifying mission and building a sustainable nonprofit model.

Final Reminders

- Use ChatGPT regularly for brainstorming and small tasks.
- Post progress and questions in the group chat.
- Remember the mindset shift: Fundraising is about connecting donors to meaningful opportunities aligned with their values, not asking for favors.

Nonprofit Navigator Coaching – February 12

Main Topics Covered:

- Fundraising Ethics: Salary vs Commission
- Organizing Donor Data: CRM Spreadsheet Tool
- Moves Management (Donor Stewardship)
- Donor Segmentation
- Board Presentation Strategy
- Personal Fundraising Stories and Updates
- Elevator Pitches for Donors
- Group Support and Networking

Key Highlights:

Adam Alsberg:

- Discussed a major donor who wants to help but needs time to finalize things.
- Asked if it's ethical to take a commission when fundraising.
- Akiva: It's unethical (and against best practices) to fundraise purely on commission.
 Instead, raise money for free initially, show your value, and then transition into a salaried role or formal contract.

Akiva Naiman:

- Explained that nonprofit fundraising should be treated like any job: you earn a salary for your work.
- Introduced a Google Sheets CRM system customized for nonprofits:
 - Tracks donor name, type, relationship manager, tier (top donors vs others),
 projected ask amount, donor notes, pledge amount, birthdays, and follow-ups.
- Emphasized: Stay organized from the beginning!
- Showed how to use AI (ChatGPT) and Google Apps Scripts to automate parts of the CRM
- Shared donor engagement examples like sending quick thank-you photos or emails after donations.

D Gross:

- Working on a presentation for the board to help structure Sunday's meeting.
- Discussed how to engage board members to be active fundraisers.
- Requested graphic design help for the board deck.
- Akiva recommended keeping the board engaged and focusing on high-return activities.

Gershon:

- Had tech issues initially but caught up.
- Asked clarifying questions about what a nonprofit board is and what it does.
- Akiva explained the board structure and responsibilities.

Yonasan Caller:

- Shared incredible momentum built from personal fundraising calls.
- After following coaching advice, made 12 calls in 3 hours, leading to 10 meetings.
- Some small donations came in; others will need nurturing for larger gifts.
- Emphasized learning that 98% of the conversation should be about *them* and 2% about *your cause*.
- Developed a repeatable strategy: one call session at the beginning of the week →
 follow-up meetings during the week.

Akiva's Feedback to Yonasan:

- **Segment donors** before calling.
- Protect your time: Some calls can't drag on too long unless necessary.
- Always remember your "why."
- Celebrate connections even if they don't give immediately.

Adam Alsberg:

- Successfully revised his project proposal email with help from Sarah.
- Shared plans to attend a wedding on the Upper East Side a strategic opportunity to network.
- Practiced an elevator pitch about his new program idea:
 - **Akiva's Coaching:** Always lead with the pain point when pitching (the problem you're solving). Be enthusiastic but concise. Pause after delivering your pitch.

Final Notes:

- Akiva shared the launch of his new Nonprofit Navigator website.
- Group encouraged to pray for each other's success.
- Strong camaraderie and positive energy!

Action Items:

- Adam: Practice the updated elevator pitch at the wedding.
- Yonasan: Add donor notes about personal connections and follow up early.
- **D Gross:** Finalize board presentation and map out different giving opportunities (events, sponsorships, individual asks).
- Gershon: Catch up on course modules and start using the CRM.
- **Shapsie:** Practice pitching the nonprofit concept to 5+ friends.

Meeting Notes – MSI Impromptu ZoomFebruary 19

Recording Link: Watch Recording (68 min)

1. Opening

- Akiva Naiman joins from the airport after traveling, apologizes for being late.
- Quick check-in on the previous class confirmed no cliffhangers left from last session.

2. David's Update (MSI Staff)

Main Points:

- Realized he must rely less on the board and more on himself to drive the organization forward.
- Issue: Some board members and major donors are dissatisfied because they expected quicker matchmaking results.
- Problem: Donors ultimately only care about whether their child gets married, not about the process or progress.

Akiva's Feedback:

- Leadership Moment: Accept that no one will care or work as hard as you.
- **Growth Warning:** Growing too quickly can cause instability; sometimes nonprofits need to **pause** and **restructure**.
- Strategy Advice: As acting Executive Director, focus on creating a six-month roadmap
 slow down growth to build sustainability.
- Messaging Advice: Shift how success is measured stop tracking marriages.
 Instead:
 - Track number of dates.
 - o Track feedback and emotional wins (e.g., optimism, sense of community).
- Fundraising Mindset: Donors must buy into the process and journey, not just the end result.

3. Shapsie's Question: Following Up on an Old Donation Pledge

Background:

- A donor pledged \$3,000 for a shoe coupon initiative last year but never gave it.
- The donor added a condition later: Shapsie needed to find three affordable shoe store options, which wasn't completed.

Akiva's Advice:

- Approach donor politely and directly: "Last year you pledged \$3,000. Here's what I was able to put together based on my volunteer time. Can you still honor your pledge?"
- Be respectful but firm.
- Important Tip: Always confirm pledges in writing after verbal conversations to avoid confusion.
- **Emotional Selling:** Frame it emotionally (helping children get shoes for Yom Tov).

Action Item:

• Shapsie to approach the donor this week and update the group.

4. Yonasan's Update (JLearn Project)

Main Points:

- Met a potential supporter at a simcha and discussed JLearn.
- No hard ask yet focused on building the relationship and getting advice.
- Advice received: Grow client base first happy clients will naturally bring support and donations.

Akiva's Feedback:

- **Nonprofit Sales Model Reminder:** In nonprofits, you serve the client, but donors fund the service. They're not always the same person.
- **Fundraising Strategy:** While building clients is crucial, don't rely only on client satisfaction for fundraising success.
- **Next Step:** Start moving towards **small grouped asks** (e.g., raise \$6,000 by getting 4 people to give \$1,500 each).

5. Adam Lombardo's Update (New Kiruv Initiative)

Main Points:

- Focused on developing young leaders who will go out and have an impact (e.g., "Pot or Tefillin" program in parks).
- Leadership training is a major theme, including emotional intelligence and communication seminars.

Akiva's Feedback:

- Donor Targeting: Highlight emotional, hands-on success stories (like the "Pot or Tefillin" kids) in marketing materials.
- **Website Alignment:** Current website messaging is too philosophical; adjust to highlight real-life leadership training and success stories.
- **Donor Engagement:** Treat donors like customers show them what their money "bought" through regular, personal updates.

6. Adam Alsberg's Update (Job Search & Networking)

Main Points:

- Waiting on materials from a contact at OU to move forward on a potential job.
- Concerned about following up too aggressively.

Akiva's Feedback:

- Keep Watching Course Videos: Don't delay learning just because one door is slow to open.
- Networking Focus: Start building a donor pipeline meet with two people this week who have giving capacity (\$500+).
- Approach: Authentic conversations without asks talk about dreams and missions.
- General Reminder: Authenticity + consistency is key in networking.



Person	Task	Deadline
David	Start drafting a 6-month sustainable operations roadmap	ASAP
Shapsie	Follow up directly with the donor about the \$3,000 pledge	This Week
Yonasan	Move towards asking donors to help close a \$6,000 funding gap	Next 1-2 Weeks
Adam Lombardo	Update messaging to highlight real leadership stories	ASAP
Adam Alsberg	Meet with 2 people who could donate \$500+ and watch course videos	This Week

Nonprofit Navigator Coaching – February 26

Recording Link: View Recording – 71 mins

1. Akiva's Fundraising Trip Lessons

- **No's are normal:** Many no's before yes's. Sometimes a donor uses a mistake as a reason to back out, but they were never fully in.
- Running events:
 - Hosted a speaker event with 55 attendees out of 83 RSVPs.
 - Events are not mainly about money but about exposure, relationship-building, and new contacts.
 - Raised about **\$20,000**; gained ~50 new names for future engagement.
- Crowdfunding insights:
 - Plan 3 months ahead.
 - Warm up supporters by reminding them why the organization matters before asking.
 - Make it fun (music, prizes, kids' activities) and high-energy.
- Planned Giving:
 - Met with a donor who initially said no to including NCSY in her will but later agreed after a personal follow-up.
- Largest Donor Prospect:
 - Met a high-capacity donor and his partner for a 2-hour dinner without making an ask.
 - Built trust and connection; setting up for a 7-figure ask later.

2. Coaching: D Gross' Major Donor Strategy

- **Situation:** Potential major donor (father of the bride) recently benefitted from the organization.
- Advice:
 - Meet soon while emotions are still high after the wedding.
 - Pitch big: Ask for naming rights (\$5M or adjusted).
 - Messaging: Explain that his daughter's match would not have happened without the organization.

Structure Naming: If selling naming rights, set an expiration (e.g., 10-20 years) for future flexibility.

3. Coaching: Yonasan Caller Update

Self-Reflection:

- Realized the need to shift focus from short-term goals to building a long-term, sustainable fundraising strategy.
- Working on a long-term plan and breaking it into actionable steps.

Advice:

- Set small fundraising goals and deadlines even while pacing slower.
- Continue moves management with top prospects (e.g., close potential \$5K donor soon).
- o "Don't rush but don't drag" keep momentum going.

4. Coaching: Adam Alsberg Update

Networking Progress:

- Met 5 wealthy contacts across different cities (NYC, LA, Atlanta, FL).
- Positive reception; contacts already associate him with Jewish young professionals programming.

Advice:

- o **Branding:** Continue building reputation as the "Young Jewish Professionals" guy.
- Relationship-building: Ask contacts for advice (not just money) to deepen connections.
- Database: Organize all new contacts and include grandparents' information.

• Future Vision:

- Focus on Shabbat experiences and longer immersive programs (not just one-off events).
- Unique pitch: "Most programs are one-night events. I'm building lasting community through full Shabbatons."

5. Other Key Takeaways

• **Grandparents matter:** They have more disposable income, respond better to updates, and are often overlooked.

- **Moves Management:** Build relationships gradually toward big asks. Create "moves" like dinners, events, follow-ups.
- Naming Strategy:
 - o Naming rights don't have to match the current budget directly.
 - It's about perceived impact and longevity e.g., naming a program could be \$5M even if annual budget is \$1M.

* Action Items

Person	Task	Deadline
Akiva	Follow up with major donor prospect after the dinner.	ASAP
D Gross	Set up meeting and make a large ask for naming rights soon after the wedding.	ASAP
Yonasan Caller	Finalize and present long-term JLearn growth and fundraising plan.	Within 2 weeks
Adam Alsberg	Continue networking, organizing contacts, and refining pitch for future donors.	Ongoing

Meeting Notes: Impromptu Google Meet – March 5

Recording: Watch Here – 59 mins

Meeting Objectives

- Assist Shabsi Kohn in identifying donor acquisition strategies beyond a single funder.
- Explore actionable ways to build a fundraising base using cold calling and prospect research.
- Demonstrate tools and techniques for donor research.
- Roleplay to practice donor outreach and follow-up scenarios.

Key Takeaways

1. Donor Prospecting Strategies

- Use peer organizations' public campaigns (e.g., OHEL, Yachad, HASC) to identify major donors
- Pull names from sites like CauseMatch, Charidy, and Upreaching.
- Extract names and amounts using the "highest donor" filter and organize data in spreadsheets.
- Remove irrelevant entries (e.g., entries beginning with "With...").

2. Donor Research Tools

- IRS 990 Filings: Use sites like ProPublica or Foundation Directory to pull tax records.
- **hatch.ai**: Helpful for identifying donor contact info and past giving history. Free and paid tiers are available.
- LinkedIn: Useful for mutual connections or verifying identity.
- Gather foundation phone numbers, trustee names, and contact details directly from public records.

3. Approach to Cold Calling

- Begin warmly. Introduce yourself and confirm if it's a good time.
- If asked how you got their info, be honest: "I found it online."
- Ask questions to connect their passion to your cause (e.g., "What got you interested in special needs?").
- If appropriate, offer to daven (pray) for someone—build emotional connection.
- Share short, emotional stories to humanize the cause and demonstrate impact.

4. Roleplay Highlights

- Simulated two calls:
 - o **Initial cold call** led to a \$1,000 donation after sharing a compelling Pesach story.
 - Follow-up call secured a \$500 gift and opened the door for future monthly support.
- Demonstrated how to naturally introduce higher-level asks, including recurring giving.
- Reinforced never to reject a gift—even a small one builds a relationship.

5. Post-Call Best Practices

- Send a prompt thank-you message.
- Log all personal and giving details into a CRM:
 - Contact info, donation history, emotional details (e.g., donor's sister's name, interests).
 - Set calendar reminders for timely follow-ups.

Mindset and Strategy

- Don't assume what's in the donor's mind; focus on the relationship.
- Every conversation is a touchpoint—success may be immediate or months later.
- Be authentic, appreciative, and emotionally intelligent.
- "No" is rarely final—it's often "not now."

Next Steps

- Shabsi to begin researching and compiling lists of donors from similar organizations.
- Akiva to assist with donor list building and sourcing tools as needed.
- Continue roleplaying in future sessions to refine call confidence and donor relationship skills.

Nonprofit Navigator Coaching – Weekly Meeting | March 12

Recording: Watch Here - 85 mins

Meeting Overview

This session focused on updates, strategy discussions, coaching roleplays, and general Q&A. A large portion of the call was devoted to practical fundraising advice, career navigation, and nonprofit leadership.

Key Takeaways

1. Celebrating Small Wins

- Yoni shared a recent donor meeting success story. A casual Shul connection led to a donor prospect and potentially a significant network.
- Akiva and Yoni discussed the sensitivity of fundraising within one's own neighborhood.
- Reminder: **Every small gift matters**. Even \$25 donations are wins and open future relationship doors.

2. Fundraising Mindset and Prospecting

- Prospecting strategies were revisited: identifying donors through Shul, community events, CauseMatch, and existing networks.
- It's critical to keep track of donor interactions even when the donation is small.
- Building relationships over time is key, and every conversation, even unsuccessful ones, are opportunities to connect.

3. Program Updates (Akiva)

- Akiva shared a pivot decision regarding the Stepping Stones program due to unforeseen challenges.
- Two options are under consideration:
 - Launch a new camp in Israel for teens with mental health challenges.
 - Partner with an existing nonprofit to provide services under another organization's structure.

• Decision will be donor-driven.

4. Creating a Culture of Contribution

- Key concept: People are willing to donate to dreams even before they are built.
- Building a Culture of Contribution (COC) from the beginning is critical for long-term nonprofit success.
- Ask for small recurring donations early, not just after beneficiaries "graduate."
- **Messaging tip:** Frame donations as partnership opportunities, not paybacks.
- Consistent stewardship (updates, gratitude, communication) is essential.

5. Roleplay: Making the Ask

- Shabsi practiced a donor pitch and received feedback:
 - o Great emotional storytelling and personal connection.
 - The ask (\$5,000 monthly) sounded high and rushed for an initial meeting.
 - Recommendation: In early meetings, focus on relationship building, sharing the vision, and inviting the donor to explore involvement at a later date.
- Coaching Tip: Avoid large asks early unless there is already a strong relationship.

6. Career Coaching for Shimon

- Shimon is evaluating two opportunities:
 - o Fundraising for a new Shana Gimmel Yeshiva program (higher risk, limited base).
 - Fundraising for an established heritage program (lower risk, strong base).
- Discussed salary negotiation tips:
 - Trial periods should still include full salary.
 - It's normal for a nonprofit to "lose money" initially on a new hire; build clear metrics to show value.

7. Career Coaching for Adam

- Adam received a strong job offer but still dreams of launching a nonprofit (ECP).
- Group guidance:
 - Take the stable job for now to build financial stability.
 - Continue building skills and networks in the meantime.
 - Stay open to future opportunities; keep the dream alive but be pragmatic.
 - Adam will send a polite follow-up to Sarah to inquire about ECP updates but should **not wait** indefinitely.

Action Items

Person	Action
Shabsi	Practice a more relationship-based initial pitch; follow up with donor leads.
Shimon	Meet with the potential employer; clarify salary expectations and bonus structure.
Adam	Accept the stable job offer; send a polite follow-up email to Sarah.
Yoni	Assist with mentorship and ideas for stewardship strategies.
Akiva	Continue coaching sessions and support career transitions.

Quotes of the Day

- "People won't buy something that doesn't exist. But people will *donate* to something that doesn't exist."
- "Fundraising is building partnerships, not collecting money."

Weekly: Nonprofit Navigator Coaching - March 19

VIEW RECORDING – 61 mins (No highlights):

https://fathom.video/share/573NBvcqU2xaGqxGhQESfzyr-58KBXyX

Main Topics Covered

- Introduction to Nonprofit Navigator group coaching model
- Mindset: "No Money, No Mission" importance of fundraising first
- Career planning: cash now vs. building long-term career
- How to value your time financially
- Strategic job search to align with nonprofit/winery goals
- Nonprofit building: slow growth model
- Donor database: start building immediately
- Balancing idealism vs. financial needs
- Setting up for future success with nonprofit and winery

Key Highlights

- **Nonprofit Navigator** = group coaching + custom 1:1 coaching as needed.
- Mindset Shift: fundraising is essential, not secondary.
- Career Discussion: differentiate between short-term "cash jobs" and long-term strategic career moves.
- Value Your Time: price yourself based on what you're worth, factoring in physical, emotional, and financial cost.
- Strategic Job Search:
 - → Find a **75% job** related to wine, agriculture, Gaza recovery, or nonprofit work.
 - → Focus on networking and future opportunity building.
 - → Prioritize jobs that grow relevant skills and open doors toward your 10–20 year vision.
- Building the Nonprofit:
 - → Start slowly but strategically.
 - → Pay yourself for nonprofit work, even at early stages.
 - → Build the nonprofit alongside your career to avoid financial pressure and burnout.
- Fundraising Preparation:
 - → Begin populating **donor database** (first 20 names).
 - → Focus on network you already have (people you guarded, friends, acquaintances).
- Long-Term Vision: combine a for-profit winery with a nonprofit mission for sustainable impact.
 - ightarrow Example: investors also donate to support PTSD healing programs through agriculture.

Action Items

- Watch Orientation video in Nonprofit Navigator portal.
- Start building donor database (link sent via WhatsApp).
- List 20 names of people to potentially fundraise from.
- Search for 75% job in wine, agriculture, Gaza rebuilding, or fundraising fields.
- **Decide** hourly value for any side gigs (e.g., bartending, security).
- **Coach Assignment**: Akiva to assign a coach depending on whether Israeli nonprofit expertise or fundraising coaching is prioritized.

Next Steps

- Focus on finding a strategic job.
- Begin filling out donor database.
- Start thinking about networking and eventual investor/donor relationships.
- Meet with your assigned coach once confirmed.

Impromptu Google Meet Meeting - March 26

VIEW RECORDING – 65 mins (No highlights):

https://fathom.video/share/xJEkWMuxMyx7qyKYofDstfXEcyA Jcdu

Main Topics Covered

- Updates: new clients joining Nonprofit Navigator
- Three tech tools for fundraising and donor management
- Strategic fundraising mindset and cold calling
- How to manage donor relationships (texting, calling, asking)
- Building a high-impact donor database
- Balancing relationship building with making asks
- Structuring donation "pitches" (high/med/low levels)
- Time management in early-stage fundraising

Key Highlights

- New Clients: Celebrating two new clients joining Navigator.
- Tech Tool 1: ChatGPT Image Generation
 - → Now much more realistic can create flyers, WhatsApp images, fake office photos for marketing.
- Tech Tool 2: Joni WhatsApp Extension
 - → Chrome extension for reminders, scheduling messages, leaving notes inside chats (donor management), syncing with Google Calendar.
 - → Game changer for WhatsApp-based fundraising follow-up!
- Tech Tool 3: ZoomInfo Chrome Extension
 - → Snapshots of donor/company info (contact details, company data) directly from LinkedIn.
 - → Use free wealth screening tools and LinkedIn + ZoomInfo to cold find new donor leads.
- Mindset Shift:
 - → Cold calling can work and generate major donations if approached strategically.
 - → Many fundraisers are afraid of asking; asking earlier builds stronger donor relationships.
- Relationship Insight:
 - → Some donors prefer to stay in touch via text only follow their lead.
 - → "The donation is the relationship" don't feel guilty asking.
- Pitch Strategy:
 - → Always have 3 options in mind: high, medium, low.

- \rightarrow Example: \$25K = sponsor program, \$10K = week of learning, \$2.5K = day sponsorship.
- Building the Donor List:
 - → Prioritize **action** over busywork.
 - → Extract donor data (even if messy) into a spreadsheet. Focus on top donors (\$500+) first.
 - → Avoid spending hours collecting data manually use AI or pay someone if needed.

Action Items

- Extract donor data from the campaign website into an Excel sheet. Pay someone if necessary.
- Create 3 pitch options (high/med/low amounts) and know what each covers.
- Call 5–11 donors per night to make fundraising asks.
- Comment in the WhatsApp group after making your first call today!
- **Build relationships smartly** ask when appropriate, don't delay forever.
- Use Joni extension to manage WhatsApp follow-ups efficiently.
- **Steward key donors** (e.g., Ben Phillips) toward larger gifts with a relationship-based approach.

Next Steps

- Focus on calling donors and making real asks.
- Use your 15-person list and grow it to 100+.
- Spend less time on busywork and more time on action: calls, meetings, asks.
- Keep momentum by documenting successes in the group chat.

Impromptu Meeting Summary: April 2

View Full Recording (81 mins)

Main Topics Discussed:

1. Akiva's Endowment Fund Update

- Akiva shared about launching a \$6M Endowment Fund for NCSY NorCal.
- First commitment secured: Eve (longtime donor) updated her will to leave a legacy gift.
- Key Lessons:
 - o Should have asked for a **specific amount** but didn't feel comfortable due to the donor relationship.
 - It's usually best to be urgent, specific, emotional in an ask.
 - o For future asks, Akiva plans to always include a **specific number** unless contextually inappropriate.

2. New Donor Prospecting Strategy

- Akiva demonstrated a cold prospecting method:
 - Search for donors using online campaign donor lists (CauseMatch, Charidy,
 - Use ZoomInfo Chrome extension to get contact info.
 - Upwork freelancer scraping all Jewish-related crowdfunding campaigns for prospecting.
- **Takeaway:** Build a list of relevant donors and **research/target** them methodically.

3. Havneh's Winery + Nonprofit Plan

- Havneh shared his dream:
 - Open a winery in the Gaza Envelope.
 - Launch a nonprofit for IDF veterans with PTSD, using agriculture therapy.
- Advice to Havneh:
 - Decide first: focus on nonprofit or winery?
 - Start the nonprofit now, even without owning a winery yet.
 - Partner with an existing winery to start programs earlier.
 - Timeline Needed: Write out a clear timeline of action steps.

• Connection: Akiva will connect Havneh with Jeff Morgan (Covenant Winery).

ACTION ITEMS for Havneh:

- Write timeline: Winery course → Nonprofit launch → Therapy types → Land acquisition.
- Call Jeff Morgan for guidance.
- Stay focused one step at a time.

4. Shabsi's Fundraising at Family Event

- Shabsi attending a **family engagement party** where potential donors will be present.
- Challenge: Feeling awkward asking family members at a simcha.

Advice to Shabsi:

- Main Goal:
 - 1. Don't pitch hard at the party **connect**.
 - 2. Ask for a quick meeting the next day.
- Key Script:
 - 1. Share passion: "I'm helping special needs families through my organization."
 - 2. Mention urgency: "We urgently need funding for Pesach programs."
 - 3. Call to action: "Can we schedule a 10-min call tomorrow to discuss?"

Additional Tips:

- Frame yourself as part of the organization, not a casual volunteer.
- Focus on the mission, not yourself.
- If it feels appropriate, and based on the person, you can "pick their brain" but be careful not to seem misleading.

ACTION ITEMS for Shabsi:

- Tonight: Approach **3+ relatives** at the party.
- Focus on scheduling follow-up meetings or securing immediate small donations.
- After the event: Email Akiva the results.

Group Closing

- Everyone emphasized the importance of:
 - Taking care of yourself financially: Pay yourself from nonprofit funds (within reason).
 - Building slowly: Start small, build trust and credibility.

- Staying passionate: Fundraising = Work of the Heart.
- o Davening:
 - Havneh davening for **Shabsi's success** at the engagement party.
 - Shabsi davening for **Havneh's clarity** with his winery/nonprofit plans.

Final Action Items:

Person	Task	Due
Akiva	Send Shabsi recording of first 20 mins	V
Havneh	Write out winery/nonprofit timeline	This Week
Havneh	Call Jeff Morgan (Covenant Winery)	ASAP
Shabsi	Connect with 3+ people at engagement party, request meeting/donation	Tonight
Shabsi	Email Akiva results of party	After event
Everyone	Daven for each other's success	Tonight