

# Schedule at a Glance 2014 Fundraising Day Program

	TRACK 1	TRACK 2	TRACK 3	TRACK 4	TRACK 5
7:00 - 8:00 am	REGISTRATION • NETWORKING				
8:00 - 9:30 am	ALL CONFERENCE SUPER SESSION WITH DEBORAH L. GUTHRIE: YOU CAN'T SELL IT OUTSIDE IF YOU CAN'T SELL IT INSIDE				
9:30 - 9:45 am	SHORT BREAK • NETWORKING				
<b>SESSION I</b> 9:45 - 11:00 am	Heidi Hancock, CFRE Jonathan Spinner BUILD AND ACTIVATE A DYNAMITE DEVELOPMENT PLAN	Carol Golden Rebecca Dupras, Esq., PLANNED GIVING MADE EASY	Erica Waasdorp THE ANNUAL FUND: HOW TO STAND OUT FROM THE CROWD	Christina Bevilacqua Jeffrey Hall DONOR STEWARDSHIP: IT'S MORE THAN JUST THE MONEY	Joseph G. Panno DISCOVER THE MAJOR GIFT OFFICER IN YOU!
11:00 - 11:45 am	BREAK • NETWORKING				
<b>SESSION II</b> 11:45 am - 1:00 pm	Andy Robinson TRAIN YOUR VOLUNTEERS, YOUR BOARD AND EVERYONE ELSE TO RAISE MONEY	Gail A. Gimnetty STRAIGHT TALK ABOUT ENDOWMENTS	Carrie Collins THE SCIENCE BEHIND THE ART: ROI FOR FRONTLINE FUNDRAISERS	Ann-Marie Harrington 10 EASY STEPS TO ROCKING YOUR ONLINE COMMUNICATIONS	Louise Rosarbo Dinsmore Cheryl Comai THE GOOD, THE BAD AND THE UGLY
1:00 - 2:00 pm	LUNCHEON FEATURING OUTSTANDING FUNDRAISING PROFESSIONAL OF THE YEAR AWARD				
2:00 - 2:30 pm	BREAK • NETWORKING				
<b>SESSION III</b> 2:30 - 3:45 pm	Sue Ogle REVERSING AND PREVENTING DEVELOPMENT BURNOUT	Joy Hunter-Chailou UNDERSTANDING HIGH NET WORTH INDIVIDUALS	Jay Love WHAT EVERY FUNDRAISER CAN DO TO STOP FALLING RETENTION RATES	Wanda Jean Lord THE SECRET TO SECURING FEDERAL FUNDING	Barrie Atkin HOW TO RAISE MORE MONEY - EVEN WITHOUT A DEVELOPMENT TEAM
4:00 - 5:00 pm	SUCCESSFUL EVENTS: MORE THAN JUST A GREAT PARTY Michele Berard, MBA, CFRE, <i>Butler Hospital Foundation</i> , Mario Bueno, Executive Director, <i>Progreso Latino</i> , Matt Netto, Rhode Island State Director, <i>Best Buddies International</i> Loriana De Crescenzo, Director of Philanthropy, <i>YRS</i>				



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## 2014 FUNDRAISING DAY IN SOUTHERN NEW ENGLAND AFP-RI ANNUAL CONFERENCE

Friday, April 11, 2014 SHERATON, 1850 Post Road, Warwick, RI

The 2014 Conference will be a **MOTIVATIONAL, EDUCATIONAL EXPERIENCE** with the goal to inspire all.

This day is devoted to **PROFESSIONAL EDUCATION** in **NONPROFIT FUNDRAISING** with complementary topics such as **MARKETING, GOVERNANCE, STRATEGIC PLANNING, MANAGEMENT AND CAREER DEVELOPMENT.**

FOR INFORMATION CONTACT AFP-RI 401-461-3863 | info@afpri.org

## Learning Opportunities for Every Fundraiser

### IMPACTFUL TOPICS

The 2014 conference program focuses on the most pressing issues we face as fundraisers today. The program is designed to be beneficial for every level of experience at every level of an organization.

### CREATIVE APPROACHES

Have you ever wondered... "How DO they do that?" Many of the sessions feature case studies from local organizations you know and love. Join your peers as they share real-life stories of success and challenge and learn how YOU can do it too!

### INSIGHTFUL PERSPECTIVES

Our presenters have seen it all! Our guests include nationally and locally acclaimed professionals who have transformed their organizations. See fundraising through a different lense!

### USEABLE TIPS AND TOOLS

Walk away from each session with tips and tools you can actually use when you arrive at your office Monday morning. Each session is designed to inspire you to find utility for your own organization and program. Challenge a project, campaign or cultivation... you will leave re-focused and re-energized with new tricks of the trade from professionals you respect.

### JOIN US!

Mingle, network, visit with exhibitors, learn from your colleagues, make new contacts, celebrate our Outstanding Fundraising Professional of the Year and more. Don't miss out!



**REGISTER NOW @ [www.afpri.org](http://www.afpri.org)**

Member - \$179 • Non-member - \$199

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*The Association of Fundraising Professionals of RI* is dedicated to increasing access to professional development opportunities for nonprofit fundraisers, executive directors and volunteers. The Chapter awards scholarships for every educational offering and strives to respond to all requests for financial assistance.



8:00 – 9:30 am

## All Conference Super Session with Deborah L. Guthrie

### YOU CAN'T SELL IT OUTSIDE IF YOU CAN'T SELL IT INSIDE

Deborah L. Guthrie, *Guthrie & Associates*

Prophetic words from Stan Slap, president of an international business consulting company. Development professionals know a strong philanthropic culture starts from within and leads to exceptional fundraising results – inside and outside. But when it comes to this elusive state we desire for our organization, aspects often fall short of expectations. How can we strengthen philanthropic culture without getting frustrated by the enormity of the challenge? Where can we focus our efforts today in order to see culture change on the horizon of tomorrow? How can every person in your program be a part of building the philanthropic culture necessary for success, even in the face of limited resources, financial challenges and changing priorities?

**Bio:** Deborah has over 32 years of senior level philanthropy program, campaign planning and execution, volunteer management, communications, marketing and consulting experience. She held executive leadership positions with several organizations including United Way, Lifespan, and Bryant University, managing staff ranging in size from 10 to 25 professionals, annual giving goals of \$4 million to \$15 million and multi-year campaign initiatives of over \$100 million.

Deborah has been providing fundraising counsel for over 12 years to nonprofit organizations around the country. She has led feasibility studies and capital campaigns and has additional areas of expertise including philanthropy strategic planning, building platforms for successful major/planned giving, annual fund enhancement, and working with diverse boards on culture change. She has also conducted successful executive searches and provided leadership coaching on a variety of subjects.

Prior to starting her own firm, Deborah was a partner in the philanthropy consulting firm of Donovan Slone & Guthrie.

9:45 – 11:00 am

## Session I

### TRACK 1 — BUILD AND ACTIVATE A DYNAMITE DEVELOPMENT PLAN

Heidi Hancock, CFRE, *Mosaic Non-Profit Development* • Jonathan Spinner, *Real Fundraising*

In this session you will discover five steps that guarantee your organization stays on track to reach its fundraising goals and what you need to do to get all members of your fundraising team actively producing effective results. Whether you are heading up a multi-year effort, setting your annual development plan, or building your first fundraising project, this session will clear the clutter, focus your efforts, get and keep everyone oriented towards your goals.

**Bio:** Heidi Hancock, CFRE is a dynamic development professional who has raised over \$70 million in annual, major gift and capital campaign funds. As the Principal of Mosaic Non-Profit Development, Heidi empowers people to be wildly successful at fundraising and serves fundraisers all over the world.

**Bio:** Jonathan Spinner, Principal of Real Fundraising, has been involved in the not-for-profit world for over 40 years in executive and fundraising positions with both small agencies and national and international organizations, has managed capital and endowment campaigns in the United States and Canada, and has personally raised millions of dollars in face-to-face solicitations.

### TRACK 2 — PLANNED GIVING MADE EASY

Carol Golden, *The Rhode Island Foundation* • Rebecca Dupras, Esq., *The Rhode Island Foundation*

Planned Giving does not have to be scary or complicated. This session will introduce three simple strategies to integrate planned giving into your development practice: bequests, life insurance and retirement plan designations. The session will address basic steps to help you add these offerings into your busy development office, allowing you to raise more money and develop deeper connections with your current donors. The emphasis will be on building a foundation of conceptual knowledge and practical tools to get you started.

**Bio:** As The Rhode Island Foundation's Senior Philanthropic Advisor, Carol Golden provides concierge-level service for a select portfolio of high-level donors, while also cultivating potential new relationships for the Foundation. Under Carol's leadership during the past two decades the Foundation has raised more than \$425 million. Carol was named the 2010 Fundraiser of the Year by the Association of Fundraising Professionals of Rhode Island.

**Bio:** Rebecca E. Dupras, Esquire is a Donor Services and Planned Giving Officer at The Rhode Island Foundation. Before joining the Foundation in 2012, Dupras concentrated her practice in the areas of estate planning and probate administration for almost seven years.

### TRACK 3 — THE ANNUAL FUND: HOW TO STAND OUT FROM THE CROWD

Erica Waasdorp, *A Direct Solution*

This session will provide live examples of measuring and optimizing your annual fund results. Learn strategies on the acquisition of new donors from internal and external sources, targeting and segmenting those donors in your database that are most likely to respond, and the latest in lapsed donor trends. Walk away with everything you need to start growing your direct mail program regardless of the size!

**Bio:** Erica Waasdorp can be considered a Philanthropyholic. She has more than thirty years of experience in direct marketing, from both sides of the desk, on the client side and the agency side. She has since worked with numerous nonprofit clients helping them with their annual fund campaigns, grant writing and monthly giving. She just published her first book called *Monthly Giving: The Sleeping Giant*.

### TRACK 4 — DONOR STEWARDSHIP: IT'S MORE THAN JUST THE MONEY

Christina Bevilacqua, *Director of Programs and Public Engagement, The Providence Athenaeum*  
Jeffrey Hall, *Senior Director of Advancement, Audubon Society of Rhode Island*

What do the Providence Athenaeum and Audubon Society of Rhode Island have in common? Both have programs that demonstrate the power of treating donors as more than their donations – critical in today's world of ever declining donor loyalty. The Providence Athenaeum's salons are the place to be, with standing room only attendance reengaging past members and enticing new ones. But it wasn't always so. Audubon's lapsed donor program for long-term members was recently featured in the prestigious international showcase of fundraising innovation and inspiration, SOFI. More in common? Well, there are the birds and handwritten notes – but you'll have to be there to learn how they are part of the story.

**Bio:** Christina Bevilacqua is Director of Programs and Public Engagement at the Providence Athenaeum, where she started the popular weekly Salon Series in 2006. She has worked in marketing, development, and program planning in both non-profit and for-profit organizations throughout her 30-year career, and ran her own custom millinery business from 1992 to 2000.

**Bio:** Jeffrey Hall has been with Audubon Society of Rhode Island for 14 years. Before coming to Audubon, Mr. Hall was principle at Hall Publications, a custom-publishing firm specializing in tourism and hospitality and co-founder of Newport Life Magazine. He is also a founding member of the Aquidneck Island Land Trust.

### TRACK 5 — DISCOVER THE MAJOR GIFT OFFICER IN YOU!

Joseph G. Pannozzo, *Chief Development Officer, Rhode Island Hospital and Hasbro Children's Hospital*

We all know that major gifts are a critical part of a successful fundraising program... so why are you so afraid? No matter your title or position, you are a part of the major gift initiative in your department. Embrace it! In the real-life cases shared in this session, you will learn how to become more comfortable with the essentials of major gift fundraising so you can raise more money for your organization. We'll discuss relationship building, helpful approaches, attitudinal qualities, secrets to success and professional growth benefits. Join us to learn what it takes to be an effective solicitor in any sector!

**Bio:** Joe Pannozzo is Chief Development Officer at Rhode Island Hospital and Hasbro Children's Hospital. In this role he is responsible for leading all philanthropic efforts for Rhode Island's largest adult hospital and only pediatric hospital. Joe's primary focus has been on rebuilding the major gifts and individual program to complement an already strong events and cause marketing effort. Prior to joining the Lifespan system, Joe held leadership fundraising roles at Tufts Medical Center, Beth Israel Deaconess Medical Center and Stonehill College.

11:45 am – 1:00 pm

## Session II

### TRACK 1 — TRAIN YOUR VOLUNTEERS, YOUR BOARD AND EVERYONE ELSE TO RAISE MONEY

Andy Robinson, *Andy Robinson Consulting LLC*

Fundraising is a teachable skill – and we need more teachers! If you want to better engage your colleagues – board, staff, and volunteers – in fundraising, join us for an interactive train-the-trainer session. We will try out a variety of exercises designed to reduce fear, build confidence, and teach the nuts and bolts of meeting with donors and asking for gifts. The workshop is based on a new book, *Train Your Board (And Everyone Else) to Raise Money*.

**Bio:** Andy Robinson provides training and consulting for nonprofits in fundraising, grant seeking, board development, marketing, earned income, planning, leadership development, and facilitation. Over the past sixteen years, he's worked with organizations in 47 US states and Canada. Andy is the author of six books, including his latest, *How to Raise \$500 to \$5000 From Almost Anyone, The Board Member's Easier Than You Think Guide to Nonprofit Finances*.

### TRACK 2 — STRAIGHT TALK ABOUT ENDOWMENTS

Gail A. Ginnetty, *The Rhode Island Foundation*

Does your organization already have an endowment or are you thinking about starting one? Review some of the best practices for effective endowment programs and the resources that you need. Determine if your organization is ready to put one in place and if you have an existing endowment, does it need to be revitalized. What are some of the commonly held myths about endowments and should your board be engaged in endowment outreach?

**Bio:** Gail A. Ginnetty is a Senior Development Officer at The Rhode Island Foundation working with individuals, private foundations and nonprofit organizations. Prior to joining the Foundation, Gail spent thirty five years as a bank executive and has served on several nonprofit boards as both a Chair and Treasurer.

### TRACK 3 — THE SCIENCE BEHIND THE ART: ROI FOR FRONTLINE FUNDRAISERS

Carrie Collins, *JD, University of the Sciences of Philadelphia*

Our profession abounds with data, but it can be difficult to determine which information to use, and how, when reporting the ROI for frontline fundraisers. This session will provide information about what metrics are relevant, preparation of performance expectations for various levels of fundraisers, how to track this performance, and then preparing and reporting ROI for frontline fundraisers. An ROI report is a helpful tool to measure whether our fundraisers are taking best advantage of the data—the science—that is available to them to better perfect their art.

**Bio:** Carrie Collins is the Vice President of Institutional Advancement at University of the Sciences, founded as the Philadelphia College of Pharmacy in 1821. Collins oversees fundraising, alumni relations, marketing, and communications and events to advance the university's mission. In her first full fiscal year with USciences, Collins and her fundraising team raised \$4,306,000 in gifts and pledges—53% more than the previous year.

### TRACK 4 — 10 EASY STEPS TO ROCKING YOUR ONLINE COMMUNICATIONS

Ann-Marie Harrington, *Embolden*

Does your nonprofit agree on whose attention you need to grab? Which messages should shine? What constitutes a win? If it doesn't, it might want to start with an Online Communications Strategy (OCS). We'll outline 10 steps for creating an OCS that can improve all of your digital communications. We'll use case studies and examples from various nonprofit organizations.

**Bio:** Ann-Marie Harrington is President and Founder of Embolden, an award-winning, nationally-known digital communications group. Ann-Marie was the U.S. Small Business Administration's 2009 Rhode Island Small Business Person of the Year. She sits on the boards of Meeting Street, Youth Pride, and the Rhode Island Commodores' Board of Governors. She also serves on The Rhode Island Foundation's Innovation Fellowship Selection Panel, which annually awards grants to Rhode Islanders with bold ideas for improving life in Rhode Island.

### TRACK 5 — THE GOOD, THE BAD AND THE UGLY

Louise Rosarbo Dinsmore & Cheryl Comai, *Partners in Philanthropy, LLC*

Have you ever wondered what your donors really think? Join us to hear from three leading Rhode Island philanthropists as they describe what has impressed them, or not, when being courted for a major gift. Hear stories of what went well, how organizations could have been better prepared, and how organizations failed to put their best presentation forward. Louise and Cheryl will also share their best major gift experiences, those that fell short, and the ones that don't quite fit the normal ask scenario - like the time a prospect greeted the CEO at the door in rollers and a bathrobe!

**Bio:** Louise Dinsmore has more than 20 years' experience including the \$15 million Ryan Center campaign at URI and \$23 million ONWARD campaign at Women & Infants. She founded Partners in Philanthropy and is also a founder of the Gabrielle Dinsmore Heart & Hope Fund, a nonprofit in memory of her daughter.

**Bio:** For over 24 years, Cheryl Comai has worked with a wide variety of Rhode Island nonprofits including a \$15 million capital campaign at Meeting Street and a \$12 million campaign for Rhode Island Philharmonic. Cheryl joined Louise in 2012 to work with clients including Amos House, Trinity Repertory Company, Sophia Academy and the Met Entrepreneurship Center.

1:00 – 2:00 pm

## Luncheon

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### FEATURING OUTSTANDING FUNDRAISING PROFESSIONAL OF THE YEAR AWARD

2:30 – 3:45 pm

## Session III

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### TRACK 1 — REVERSING AND PREVENTING DEVELOPMENT BURNOUT

*Sue Ogle, ESC of New England*

With both decreased access to resources and increasing demand for services, nonprofit employee burnout is a serious risk facing many organizations. Given fewer resources and higher expectations to solve “truly monumental problems,” nonprofit development staff are especially susceptible, and turnover in this role is demonstrated to be the highest in the sector. This workshop will review organizational conditions which can lead to burnout, as well as characteristics to watch for among yourself, volunteers and employees. Specific topics include: why and how burnout can occur; establishing effective and reasonable expectations; and addressing issues of work distribution, recognition/reward, communication, and time management.

**Bio:** Sue Ogle is an ESC consultant and has worked with numerous nonprofits in the areas of organizational development, strategic planning, and team building. She has served as a lead facilitator for ESC Team Building, Constructive Feedback, and Trainer Programs. Sue has 30 years of training and consulting experience that include founder of OGLE Training and Consulting, Assistant Director for Career Placement at Yale School of Management, and Managing Partner of Career/Life Alternatives.

### TRACK 2 — UNDERSTANDING HIGH NET WORTH INDIVIDUALS

*Joy Hunter Chaillou, Senior Vice President and Senior Nonprofit Advisor, U.S. Trust*

Exploring findings from the 2012 Bank of America Study of High Net Worth Philanthropy, this session offers insights on giving trends and strategies for America’s wealthiest families and how you can use this invaluable information to strengthen relationships with donors, promote their planned giving programs, and plan for the future. This study delves deeply into many key questions such as: What motivates these donors to give? What factors make them stop giving? What is their level of fulfillment from their charitable activities? How can we as financial planners, advisors and nonprofit leaders make the most of this information to further our organizations and relationships with high net worth clients/donors?

**Bio:** Joy Hunter Chaillou is a Senior Nonprofit Advisor in the Institutional Investments & Philanthropic Solutions group. In her role, Joy serves as a consultative resource for qualified nonprofit clients of U.S. Trust, across Bank of America and its affiliates. She provides tailored services, solutions and best practices to institutional nonprofit clients. Joy works closely with organizational leadership, boards, development committees and staff helping them to capitalize on opportunities and address challenges in support of successful mission fulfillment.

### TRACK 3 — WHAT EVERY FUNDRAISER CAN DO TO STOP FALLING RETENTION RATES

*Jay Love, Bloomerang*

This session explores what can be done about retaining donors based on the principles of Dr. Adrian Sargeant, the world renowned authority on building donor retention and donor loyalty! Dr. Sargeant’s principles are based upon years of research conducted in the sector and can be used by any organization whether you are a one person shop or a large department. We will show examples of his principles in action. The results can be astounding when put into daily use. As Adrian states “even a 10% increase in retention can double the lifetime value of your current donors!”

**Bio:** Jay B. Love is CEO and Co-Founder of Bloomerang. He currently serves as the Senior Vice President of Avectra. Both organizations serve the nonprofit sector only. Prior to Avectra, he was CEO of Social Solutions in Baltimore, MD. He was engaged as a turnaround specialist for them. Prior to Social Solutions, Jay was Senior Vice President of the Arts and Cultural Division of Blackbaud.

## Session III Continued

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### TRACK 4 — THE SECRET TO SECURING FEDERAL FUNDING

*Wanda Jean Lord, Principal Consultant, Lord & Associates*

Using the Catalog of Federal Domestic Assistance in this hands-on session, participants will gain an understanding of the types of federal assistance for which their organization may be eligible. Best practices in identifying whether an organization is ready to obtain or expand federal funding will be discussed. By the end of the session participants will be able to identify the standards that govern federal funding and understand how to leverage them to benefit their organizations.

**Bio:** For over 20 years Wanda Jean Lord has worked to successfully increase federal and other funding to eligible recipients. She has secured a range of funding levels from thousands of dollars into the millions for nonprofits, for-profits, towns, counties and tribes. At conferences, and through webinars across the nation, Wanda has taught the best practices in federal grants management that has benefitted nationwide clients, including health, social services, and environmental organizations as well as construction and economic development projects and arts and culture initiatives.

### TRACK 5 — HOW TO RAISE MORE MONEY - EVEN WITHOUT A DEVELOPMENT TEAM

*Barrie Atkin, Atkin Associates LLC*

Don't have enough money for a fully staffed development team? No problem. This seminar offers more than 25 tactics, techniques and best practices to make your fundraising easier and bring in new money. Topics include: Reasons people give and how to benefit; How to engage your Board in fundraising; Useful language to add to appeal letters and website; How to increase bequests; Cultivating prospects, thanking and follow-up; Techniques to use when you're turned down; and Audience Sharing.

**Bio:** For more than 25 years, Barrie Atkin, president of Atkin Associates LLC, has helped organizations, ranging in size from senior centers to The Nature Conservancy, solve strategy, marketing and fundraising challenges. As Executive Producer of an award-winning documentary film, Barrie implemented best practices to bring in new donors and repeat gifts. She is passionate about helping others become more comfortable (and more successful) at fundraising.

4:00 – 5:00 pm

## Closing Panel

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### SUCCESSFUL EVENTS: MORE THAN JUST A GREAT PARTY

*Michele Berard, MBA, CFRE, Butler Hospital Foundation*

*Mario Bueno, Executive Director, Progreso Latino*

*Matt Netto, Rhode Island State Director, Best Buddies International*

*Loriana De Crescenzo, Director of Philanthropy, IYRS*

Most nonprofits rely on special events as a critical part of their fundraising program. Events can be time consuming and expensive, but can raise the funds and awareness critical to your organization. If done well, events can also be the catalyst for major gifts and long-term donor relationships. Our panel will share how their organizations have used events as an integrated part of a successful fundraising program and successfully engaged event attendees and sponsors. The discussion will also include how to evaluate the success of a special event, and determine whether to continue an established event or change direction.