

## Session 1 Program Descriptions

### **Best Practices in Annual Giving – Chris Kasavich**

As the foundation of a strong fundraising effort, Annual Giving incorporates numerous means of communication and messaging. It can be easy to continue with what you have been doing, rather than step back and examine what you have done. This session will look at the core components of a successful Annual Giving effort, and discuss best practices in the areas of direct mail, telefund, e-philanthropy, and leadership giving.

### **Grant Proposals Step by Step – Alice Ferris, CFRE**

It's inevitable—at some point in your fundraising career, you will need to write a grant proposal. It may be for a private foundation, the marketing department of a major corporation, or a local community foundation. What they all have in common is giving the funder what they ask for. To do that, we'll walk through how to figure out what you're asking for and how to best communicate it; how to research a funder; when to communicate with a potential donor; how to put together the proposal; how to report your results, and funder pet peeves.

### **Cultivating Today's Sophisticated Donor – Robert B. Rice**

Today's sophisticated donors expect more from the organizations they choose to support philanthropically. In the age of oversaturation, venture philanthropy, and visionary donors, non-profit organizations must change the way they cultivate donors to position themselves for success.

Join Bo Rice for a presentation about "Cultivating Today's Sophisticated Donor." Bo will employ case studies from the healthcare and higher education sectors to demonstrate best practices for cultivating more engaged donors who require heightened and personalized communications about the causes they support.

### **Engaging Women Leaders in Philanthropy – Cindy Atmar, CFRE; Betty Karlsson, CFRE and Laura Lanier**

Today more than ever women leaders want to make a difference, get to know each other and have a real impact on their communities; however, their time is scarce. This interactive session presents real-life case studies that show how three experienced fundraisers successfully engage high-level women via a unique and customized giving society focused on leadership giving levels. We will share the secrets of targeting a special affinity group: women business leaders, social leaders, and community leaders. We will show how to build a leadership network of women philanthropists in your community.

### **Diversity in Donor Relations – Tiffany D. Thomas**

The session will begin with an overview of philanthropic trends and present information to further the professional's understanding of the giving trends in various communities of color (African-American, Latino and Asian American). By 2020, Houston is projected to be one of the most diverse communities in the United States. What does this mean for your fundraising strategy? Do you understand why and how other communities contribute philanthropically? Such information will be helpful for those interested in fundraising as a career, mid-level professionals, or anyone interested in understanding prospective donors and interested in expanding their donor base.

### **Six Principles for A Successful Board/ CEO Partnership – Jonathan Schick**

Non-profit boards are often riddled with political and functional challenges that creep into the running of the organization, conflicting with operations and inhibiting effectiveness, despite everyone's devotion to the same set of goals. In his dynamic presentation, Jonathan Schick shares the Six Principles that can unlock an organization's potential and lead to successful board/CEO partnerships.

After implementing the Six Principles model, one CEO reported this increase in board contributions:

- 2007: Average \$1,850 gift per trustee
  - 2008: Average \$10,250 gift per trustee
- Results: 550% increase

### **Making The Ask . . . In More Ways Than One – Mike Bacon and Marion Lee**

We all know how to ask for money. Or do we? Could there be more than seven ways to ask donors to support your cause? We've developed at least seven and added a few more for good measure. This session will explore the elements you need in place before you make the ask, will remind us all about the cultivation that must take place before the gift request, and then will walk step-by-step through seven ways to make the charitable request. This is a great session for anyone involved in the solicitation process – from beginners to seasoned professionals.

### **Job Hunting is Akin to Donor Stewardship! – Marianita Paddock Snodgrass**

Fearful about making a career or job transition, finding another job, or creating the job of a lifetime? Worried about successful donor stewardship? Don't be! This workshop will bring clarity and success to both endeavors that sometimes seem mystifying.

Through interactive learning, discover the key to landing a job and a donor. The presenter will guide you through a series of proven skills to craft an effective resume, job search, network and interview preparation that will take the fear out of the process. Along the way, uncover six easy steps for donor stewardship.

Whether you are a newcomer to fundraising or a veteran, you will walk away with a simple analogy that will provide knowledge and a plan to achieve a successful job search and stewardship program.

### **Play the Fundraising Game and Win! – Carrie Eickenroht**

Carrie Eickenroht will share her expertise in managing successful fundraising events that can help your organization grow and develop new supporters. Having raised over \$80 million for clients through special events, Carrie knows how to find supporters, organize an entertaining program and engage an audience. First an organization needs to consider if they are ready, willing and able to launch a special event. For inaugural events, many factors need to be considered before deciding to tackle this major undertaking. Board, staff and donors need to be engaged in the process. Unique themes or a "draw" need to be considered to attract a broad audience. Houston is full of wonderful event opportunities. What will make your event stand out as a "must attend" on the social calendar? Then what will it take to succeed? Can you create a wonderful, annual tradition? Careful plans and even more diligent implementation are essential to your event. No detail is too small. Carrie will guide you through the steps necessary to develop a plan for a successful event and then to implement the plan to a smash hit.

### **Congratulations Development Director, you got the job. Now what do you do? - Michael Delzotti, CFRE, CSPG**

As a new development director, once on board, how do you begin to build a culture of philanthropy and start a major gifts program? The philosophy, ethic and tactic of major gifts will be explored so that you may begin to take step by step measures toward this end. We will mix big picture AND action steps to give you the skills and methods to discover, connect and invest prospects in your cause. Trust me, you'll like this session and it's good for you!

## Session 2 Program Descriptions

### **Fundraising in a One-Person Shop: Making the most of a Shoestring Budget – Susan Simons**

Fundraising when you are the development department or sole development staff member – either volunteer or paid – can be intimidating or a challenging opportunity for professional growth. The key to fundraising in a small shop is organization, prioritization and resourcefulness. This workshop will give you some tools and ideas to help make life easier and more productive.

### **Who Are the People That Will Give to Your Organization? – Cooky Mays, CFRE and Mark Niles**

Do you have a crystal ball, or a Ouija Board in the office that tells you “yes” or “no” or do you have some other magic mechanism? Developing an alliance of people who will give generously to your organization is a combination of art and science. Building successful relationships is the single most important function of a professional, successful fundraiser. That means you must be able to research effectively and then know how to qualify those identified prospects. Take this opportunity to learn how to prospect for donors more effectively. Learn the proven techniques that will give you the advantage in building your donor team. Join this workshop and discover new perspectives and techniques. Participate in a prospecting exercise and take valuable tools back to your organization. The workshop leaders will share methods that work for you. Yes, “people do give to people” and the more intimately you know your prospects strengthens your position to make one of those next “people” you.

### **Diversity and Inclusion – Not Just More of the Same – Janet Cohen**

Be prepared to participate and interact in a fun-filled, heart-opening session that does more than label people in categories and tell you why diversity and inclusion is important to the health of your organization (and your own personal life). This session will be highly interactive and experiential. It will begin and end on time, and participants are asked to stay for the entire session or it will impact the learning for other group members. *And* it will be worth the investment of your time. Particular emphasis will be placed on invisible differences, as well as visible ones.

### **How Tweet It Is to Have a Friend Like You! – Nicci Noble**

Web 2.0 technology evolves every day; non-profits have an ever growing arsenal of choices on how they can spread the word about their work and fundraise to support it cost effectively online. The question is how to best leverage it? From the seasoned executive that is fully staffed to the one-man shop, the challenges are similar. Learning how to integrate your organization's brand, mission, and call to action by utilizing social networking tools appropriately presents a number of opportunities.

### **Putting the STRATEGY in your Strategic Plan – Stephanie Foy**

This session will help you learn to distinguish goals from strategy and the process for creating a truly strategic plan. The capacity to embrace an ever-changing environment and develop strategies for our organizational success suggests that we need to ***think differently*** in order to ***plan differently***. Getting to strategic thinking is the first critical step to creating a truly **Strategic** plan, not just a new iteration of the one that now occupies a space on your bookshelf or hard-drive and is brought out occasionally for review and update.

Once we've engaged our thinking and developed our plan, we need to ensure the organization is aligned around the strategies. Lots of organizations fail to realize their envisioned future because they failed to realize the misalignment in the system that impeded, or at the very least, created inertia and thwarted their forward movement

Finally, we must tap into the creative force to implement our strategies and achieve our vision. A forced strategy has much less chance of success than an inspired one. Keeping the creative juices flowing keeps the strategy alive and a mobilizing force for the future,

### **Creating A Successful Board and Staff Partnership – Nicole McWhorter and Ben Renberg**

Executive leadership of non-profits face numerous challenges in their quest to achieve the right balance in board leadership. Your Board members need to be well-informed, enthusiastic and involved advocates who engage in fundraising for your organization. Board members can be incredibly effective in fundraising roles helping to fill one of your greatest needs – donor retention!

In this session, participants will learn and discuss:

- What makes a high-performing board and Best Practices for effectively managing the non-profit board
- How the board and staff can work collaboratively to move an organization to the next level
- Recruitment techniques and stewardship ideas for volunteer leaders
- Meaningful opportunities for engaging board members

### **30 Tips to better teams using the 3R's: Recruitment, Retention & Rewards – Tania Little, CFRE**

30 Tips to better teams using the 3R's: Recruitment, Retention & Rewards is a "how to" on hiring, motivating and recognizing employees for new or developing managers who want to build strong teams. Most individuals are promoted to a managerial role, before they've ever developed the skills to manage people let alone create a winning plan to find great people. This interactive session will engage delegates to identify the top 30 tips for better human resources practices for managers so that they can create a strong process and plan for hiring, managing and maintaining their team. In addition, there will be opportunities to learn from each other's successes and challenges and a package with great resources will be provided.

### **Planned Giving: The Time is Now – Kevin Pickett**

During the next 30 years this country will see the largest generational transfer of wealth in the history of the world. Are you and your organization prepared to help your donors support your important work through their estate plans? Every one of your donors has an estate plan. Is your organization in it? If not, what are you doing about it? Regardless of the size of your development budget (big or small) the future of your organization may depend on your ability to secure planned gifts today.

In this session you will learn:

- to identify planned giving prospects from donor base
- to formulate communication strategy for planned giving prospects
- basic knowledge of most commonly used planned giving strategies

This interactive discussion will provide proven practical tips on how to improve or even implement a successful planned giving program in your organization.

### **Fundraising Events – There Are No Do-Overs! – Julie Dokell and Lynn Ellis**

Presenters will share their wealth of experience as award winning event and meeting planners. As attendees relate their experiences and issues, solutions will be provided relevant to the subject. This interactive session's goal is to answer YOUR questions about any and all types of events and their attendant issues, joys and plans.

Fundraising events don't just happen. Successful events raise money because of strategic planning and effective tactical execution. When planning your 1st event or your 20th event, learn to maximize results for your investment of effort, time, treasure, and talent of staff and volunteers.

### **Major Gift Negotiation Skills – Scott Staub, ACFRE**

It's no secret that the ability to be a strong negotiator is important in the process of securing major gifts. In this session, participants will learn how to strengthen their negotiation skills to build a solid major gifts program. Come prepared to learn and practice new skills that you can implement immediately to enhance your solicitation skills.

## Session 3 Program Descriptions

### **How You say Thanks Makes A Statement, Too! – Harv Mock**

Successful non-profits understand that the more effective they are in communicating their vision, promoting their achievements and sharing their stories, the more successful they will be in strengthening donor relationships and generating increased support. Learn how new technology, the internet and advanced fabrication materials have revolutionized donor recognition and changed the traditional donor wall from a static display to a dynamic, engaging destination that informs, entertains, inspires and evolves. In this valuable, informative session you'll learn:

- What is a virtual recognition display?
- The Pro's and con's of interactive and self-cycling multimedia displays
- When to combine Static and electronic displays
- How to maximize your display through marketing and public relations
- Integrating donor recognition into your web site
- Interactive touch screens as outreach marketing tools

And you'll see many examples of interactive, self-cycling and integrated recognition displays, donor walls and walls of honor that say "Thank you" in ways that elevate recognition to new and exciting levels.

### **Storytelling: Communicating Your Message with Infectious Passion – Jim Anderson**

It has been said that no one ever gave to an organization because of a Power Point presentation. So why do people contribute to a cause? Because their passion for making a difference has been ignited! You can help ignite a prospective donor's passion for your cause through the fundamentals of storytelling. Whether you're telling the story through a grant proposal, a video message, a radio announcement, or one-on-one, you can use storytelling structure to pull the donor into the picture and help them see their role in making your mission a success.

### **Charity? Or Tax-Exempt Business? – Jean Block**

Today's economy is challenging many non-profits to rethink how they generate revenue to support and sustain their vital programs and services. Are you ready? Understanding social enterprise, or earned income, is becoming a requirement for many development professionals, leadership staff and board members. This hands-on workshop will walk participants through the key steps and skills required to launch a successful social enterprise that diversifies their revenue. Participants will complete detailed worksheets and share experiences with others. The session is lead by an energetic and experienced non-profit professional who teaches social enterprise throughout the United States.

### **Bringing Your Campaign To The Big Screen – Ken Kosub**

This presentation will explore how organizations can use films to strike an emotional cord with donors to help support their capital campaign efforts. It will be targeted at a wide audience, from those new to fundraising as well as someone who has participated in numerous campaigns. The presentation will be a very interactive discussion using a keynote presentation with supporting information, handouts of production budgets as well as examples of films in use today.

Participants will learn about the filmmaking process – from creative development and pre-production all the way through production and post-production. Handouts of cost estimates will be provided in order to discuss “how much does a film like this cost?”

Several video examples will be shown to give the participant the opportunity to see first hand how all of the production elements come together to touch the donor on an emotional level. The presentation will also cover options for distributing your campaign film to strategically reach your target audience.

Participants will be encouraged to ask questions and to discuss challenges they have experienced in their own campaigns.

### ***It's Not Your Grandma's Fundraising Anymore! – J.C. Patrick***

*We've conducted our fundraising efforts – successfully! – much the same for years. But we are finding the new groups of donors may not respond to these tried-and-true methods. We will examine the Boomers, Xers and Millennials – what makes each of them tick. For each group, we will explore motivational messages, ideas for donor relations, and tips for successful volunteering. We will also learn how to conduct meetings with each group of donors – they are all very different! There will be time for questions and shared experiences on channeling these groups into a perfect fit for your organization*

### **How to Achieve Your “Dream Team” Board? – Sean D. Carter, CFRE**

One of the multiple roles of a non-profit Board of Directors is to build upon itself. Recruitment is one of the most important duties of board as it not-only affects the governance of the organization but it ensures its future strength as well. With this in mind, the Nominations Committee of a board is one of the most important. So...Who does the recruiting? When do we recruit? Where do we recruit? Who does the nominating? Should there be minimum requirements? How do we filter out those who are not contributing? These questions and many more will be answered in this session, as we discuss how to retain and expand your “Dream Team” Board.

**Demystifying the CFRE Exam – Angela Seaworth, CFRE**

If you have ever considered taking the CFRE exam, this session will demystify the certification process and help you prepare to pass the exam. Explore exam content, become familiar with question logic, question analysis, and study tips with a CFRE Subject Matter Expert. Leave with knowledge to develop a personal strategy to prepare for the examination.

**Building A Successful Major Gifts Campaign From Scratch – Timothy Burcham, CFRE**

This session will focus on the planning, development, and implementation of a major gifts campaign within the context of a comprehensive development program and the essentials to success for any organization that wants to move in this direction. Major points will be illustrated

by showing how I started a development program from scratch for our system of 16 colleges here in Kentucky by initiating a major gifts fundraising effort through two, statewide campaigns. I will walk through all of the elements of these two campaigns, which to date have raised more \$138 million. Participants will understand that they too can raise major gifts if they follow some fundamental principles and focus their efforts in a systematic and sequential way.

**Corporate Panel Discussion with representatives from Chevron, Apache and KBR****Session 4 Program Descriptions****Plugging into New Donors – Scott C. Staub, ACFRE**

Whether starting from scratch or taking an existing program to a new level, this session will provide helpful strategies and techniques to acquire new donors – and how to keep them. Learn how to create a donor acquisition plan that ensures we have potential donors in the pipeline and work in a smarter, more effective way.

## **Fundraising Best Practices: Donor-Centered Not Dollar-Centered – Nicole McWhorter and Ben Renberg**

Even in today's challenging economic times, successful major gift campaigns continue to be organized, planned and executed. But only those with all the right components in place will be successful. This session focuses on building the "know-how" to inspire donors to give and the best practices that define high-performance fundraising. Learn what donors expect before and after making an investment, the role board and staff play in fundraising and ways to increase fundraising results, even in tight economic times.

In this interactive session, participants will:

- Learn the components of high-performance and best practices for successful development shops
- Receive specific recommendations on managing and evaluating the fundraising process
- Learn how to translate mission and programs based on donor motivations
- Develop action steps to implement in their organizations

## **Make CRM Software Work For You – Brian Pickett**

Join Brian Pickett of PickettCRM to learn how your organization can capture the promises of Customer Relationship Management (CRM) software. Promises include:

- Streamlined workflow
- Improved supporter / donor relationships
- Larger and more frequent gifts
- A better brand, reputation and greater sense of community
- Relevant data with which to make more informed decisions
- More donors

This session includes an overview of CRM software, the benefits available to non-profit organizations and the process for successfully selecting and implementing CRM software. Attendees will actively participate in the planning process for a sample non-profit organization, including composing a strategic plan, objectives, milestones and tactics for achieving measurable results with CRM.

The goal of this session is for attendees to learn the potential and power of CRM software as well as the process to harnessing this tool for their unique organizational needs and goals.

## **Relationships: The Name of the Game – Janet Cohen**

For the senior level professional, this is about more than simply building and maintaining relationships with donors, volunteers, colleagues, media and a score of others. Don't attend this if you want to sit and listen to someone tell you that you need to make contacts if you want to raise money.

But if you want to look at your relationships, learn to boldly tell the truth without apology, move

forward when you are stuck, manage pressure from the board, the staff, the volunteers, your family/significant others, and look at your role in the process, then be prepared for an unusually interactive and informative session.

### **Jewish Giving – It’s Not About Charity, It’s About Justice: How to Steward and Cultivate Donors from this Uniquely Diverse Community – Amelia Kleiman and Elise Passy**

Although a third generation native Houstonian and an active volunteer in the Jewish community, Amelia grew to understand more about how the values and tenets of Judaism combined with the Houston Jewish community’s unique intersection with essential Southern values while serving as Executive Director of the Houston Jewish Community Foundation for eight years.

This perspective allowed Amelia to develop distinctive methods of stewarding and cultivating donors from her own community, a perspective she has shared successfully with clients and the organization she has served over the years.

In this fast-paced presentation, Amelia will share these insights and provide a basic understanding of this unique intersection of giving in the Jewish South, including a brief history of the Jews of Texas and Houston, and offer ideas on how others can reach out to this distinctly diverse community.

### **How to Keep Your Cool, When Things Get Hot! – Ann Hale, CFRE & Gretchen Gordon, CFRE**

The climate we work in is more challenging than ever before, especially when it comes to ethical practice in fundraising and non-profit organizations. Join Ann Hale, CFRE and Gretchen Gordon, CFRE from AFP Alaska for an interactive workshop that will explore the definition of ethics and ethical behavior, provide you with tools and resources, and discuss case studies to guide you when confronted with the difficult ethical choices we face daily as development professionals.

### **Become a Better Major Gift Negotiator – Shaun Lynch**

Negotiation is at the very core of what we do as fundraisers. We negotiate contribution levels with prospects and recognition opportunities with donors; we negotiate with institutional colleagues to determine the programmatic content of fundraising campaigns; we negotiate with senior volunteers to establish campaign objectives; we negotiate with prospective volunteers to secure their agreement to help in a campaign, and later to get them to accomplish the tasks they have agreed to carry out.

Three “learnings” attendees should expect to leave with:

- Understand the concept of the “anchor figure” in a negotiation, and use the concept to

raise prospects' sights

- Know how to use the elements of "shadow negotiation" to create an atmosphere conducive to agreement
- Know how to overcome the 6 negotiation habits that keep you from getting the biggest gifts possible

### **Accentuate the Positive, Eliminate the Negative and Build a Winning Team - Marianita Paddock Snodgrass**

Your greatest fundraising asset is YOU, your TEAM, Board members, and how you think independently and collectively. Why not capitalize on these resources?

Be motivated and invigorated as you learn to build your strengths individually, as a leader of your team, and for each team member. Discover the four domains of leadership strengths, how they benefit your overall effectiveness, and how to apply them.

Utilize passionate thinking, employ simple steps to change negative interior dialogue and influence team members to adopt visualization, enthusiasm and belief in the power of positive thinking! By doing so, you will create an affirmative environment to help you and your team achieve what you truly want and watch your success rate soar as stellar fundraisers.

### **Boards Members and Volunteers: Development Foe or Friend? – Missy Ryan, CFRE**

Do you find that your board members seem to have an opinion on all things except actually getting out the door to raise money? Or do they say I don't like to ask for money? Or even worse they don't actually show up to the meeting. Attend this session to finally decide: is a board member your development FOE or FRIEND? If a volunteer is a foe we will discuss strategies to turn your least active volunteer into your new fundraising star. And, if your volunteer is a friend we will talk about spreading the goodwill towards fundraising to others.

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