

## Firing Lousy Board Members

Bad board members produce bad governance – a huge risk for the nonprofit sector. In her new book, *Firing Lousy Board Members – And Helping the Others Succeed*, Simone Joyaux focuses on finding the right board members, supporting board success, and firing poor performers as a last resort. In this session, Joyaux will help you get the best from your board.

### You'll learn how to:

- Find the right board members
- Define expectations and evaluate performance
- Give feedback to poor performers

**Speaker:** **Simone Joyaux**, ACRE, Adv Dip, Author & Consultant, Joyaux Associates

## Creating A Movement: Building Engagement and Inspiration with Corporate Partners

Cause marketing campaigns excite people into action. How do you find the right corporate partner to advance the mission of your organization? HINT - Keep the focus on the community where your donors, and the corporation's clients, live and serve.

### You'll learn how to:

- Find the right corporate partner that aligns with your mission
- Create successful co-branded campaigns
- Leverage the eyes and ears of consumers to gain more sponsorship dollars

**Speakers:** **Jennifer Cohan**, President, Edelman; **Anthony Signorelli**, Senior Vice President, Strategic Partnerships, The Advertising Council; **Patsy Taylor**, Director, Strategic Partnerships, Marketing Communications, YMCA of the USA; **Holly Thomas**, Former Group Vice President, Cause Marketing/Special Events/Tourism Strategy, Macy's, Inc.; **Moderator:** **Diahann Billings-Burford**, Executive Director, Cultural Investments, Time Warner

## 30 Ideas in 60 Minutes: Your Hour of Creative Power

In this fast-paced, must-attend session, you will hear from three industry experts on what's working now in direct marketing fundraising. You'll head back to the office with valuable tips that you can put to work to improve revenue, boost retention, and reduce costs for your program.

### You'll learn how to:

- Improve results through creative design techniques
- Write effective copy that will inspire people to give
- Upgrade your donors to maximize their value

**Speakers:** **Pete Carter**, Principal & Senior Vice President, Chapman Cubine + Hussey; **Cheryl Keedy**, Creative Director, The Harrington Agency; **Karin Kirchoff**, Founder and President, K2D Strategies; **Moderator:** **Amy Tripi**, President, Tripi Consulting Associates, Inc.

## Embracing Change: Navigating Leadership Transitions

All organizations experience leadership transitions. Some are expected and well-planned, and others are unexpected and potentially crisis-making. Come hear two nonprofit leaders shed light on how leadership transitions – no matter how they arise – can be managed successfully.

### You'll learn:

- Why you need a leadership succession plan
- Best practices for navigating a transition
- The DOs and DON'Ts of unexpected transitions

**Speakers:** **Simone Joyaux**, ACRE, Adv Dip, Author & Consultant, Joyaux Associates; **Hildy J. Simmons**, Independent Philanthropic Advisor

## Unique Ways to Engage Corporate Partners

Corporations are inclined to make contributions to a nonprofit for branding, marketing, product placement, employee retention, and community engagement opportunities. A donation is often motivated by business and philanthropic goals to make an organization more profitable, while being viewed as a "good corporate citizen."

### You'll learn how to:

- Create meaningful, more holistic corporate partnerships
- Discern impactful opportunities for branding and marketing
- Tap into corporate talent to provide expertise and resources

**Speakers:** **Hilary S. Ayala**, Director, Strategic Partnerships Programs, Con Edison; **Richard Brown**, Vice President, Philanthropy, American Express; **Dan Delany**, SVP, Strategy & External Relations, Network for Teaching Entrepreneurship; **Stephanie Hochman**, Senior Program Officer, Employee Engagement, Citi Foundation; **Moderator:** **Jessica Wilson**, Former Vice President, Development and Marketing, Prospect Park Alliance

## Plan Now for a Successful Year-End Giving Campaign

For many nonprofits, approximately 30% of their annual donations come in the month of December with 12% happening in the last three days of the year. With so much at stake, organizations need to begin year-end planning long before the first day of school. Come hear two industry pros share their experiences on how to plan now for a successful year-end fundraising season.

### You'll learn how to:

- Build your list prior to year-end kick-off (timing is everything!) and warm up your audience to increase conversions
- Develop creative and copy tests to increase ROI at year-end
- Expand Giving Tuesday to a multi-day campaign

**Speakers:** **Steve Abrahamson**, Director, Direct Response Marketing, National Audubon Society; **John Mix**, Senior Director of Marketing, Human Rights Watch; **Moderator:** **Giselle Holloway**

## What's the Plan

Do you have a strategic plan that your annual planning is not supporting effectively? Is your annual organizational planning process really helping Development achieve its goals? Are revenue projections developed without benefit of a larger organizational conversation? If you struggle with ineffective annual planning, this session is for you.

### You'll learn:

- Why it is critical for planning to be a cross-organizational process
- What information goes into an effective annual plan
- How Development can advocate for better organization-wide planning

**Speaker:** **Jennifer Flowers**, MBA, Founder & CEO, Accreditation Guru, Inc.

## Getting in the Door & Making the First Approach

It can be hard to get the initial attention of a funder if you don't have a personal connection or receive a direct introduction. How can you grow your list of funders if you can't get past the gate? Hear from both corporate and foundation representatives on the best first approach strategies.

### You'll learn:

- How to distinguish yourself in an increasingly competitive field
- Whether it is necessary, and how, to tailor an LOI or initial correspondence differently for a foundation vs. a corporate philanthropy group
- What are acceptable and preferred methods for cold outreach

**Speakers:** **Catherine Blaney, Esq.**, Head of Partnership Development, Special Advisor to CEO & President, Bloomberg Philanthropies, The National September 11 Memorial & Museum; **Sara Elghobashy**, Senior Managing Consultant, Advance NYC; **Jennifer Negron**, Program Officer, The Pinkerton Foundation; **Moderator:** **Robin Merle**, Consultant

## Taking Your Fundraising Copy from Blah to RAH!

Compelling fundraising letters don't just happen ... they are the product of many months (and years) of hard work. In this session, we'll teach you the secrets to discovering and telling your best fundraising stories. Join our recognized fundraising storytellers to learn how to effectively use stories to engage donors and raise more money!

### You'll learn how to:

- Cultivate relationships with program and field staff who are the keepers of your organization's stories
- Turn your stories into fundraising letters that inspire donors to action
- Convince your leadership to accept direct marketing best practices and not rewrite your letters

**Speakers:** **Jocelyn Palmer**, Director of Annual Programs, Mount Sinai Health System; **Kathy Swayze**, CFRE, President & Creative Director, Impact Communications; **Moderator:** **Lisa Maska**, CFRE, Partner, Lautman Maska Neill & Company

## Thanks... I Think: The Importance of Gift Acceptance Policies

Not every gift is appropriate for every nonprofit; some gifts can cost the organization money, time or even its reputation. To know what gifts may not be right for your organization, it's important to develop and adopt a gift acceptance policy before a troublesome gift comes along. This will be an interactive session, so bring your case scenarios with you.

### You'll learn:

- Why your organization needs a gift acceptance policy
- What to consider when developing a policy
- How to build board support for a gift acceptance policy

**Speaker:** **Robin Rosenbluth**, Principal Consultant, Advancing Fundraising: Coaching and Consulting

## The Double Bottom Line: Diversity, Inclusion and the Future of Grant Funding

Following the 2017 NYC Cultural Plan, it was suggested that city funds for cultural institutions could be tied to the diversity in the organizations' leadership and board. Many foundations are beginning to take into account the makeup of potential grantees' boards and leadership when making funding decisions. If your organization is not addressing these issues, you will be left behind and leave money on the table.

### You'll learn:

- Why having diverse leadership, especially on a board of directors, is important to funders
- How to begin the process of diversifying your board
- How to highlight your organization's progress building diversity and inclusion into your core values

**Speaker:** **Cecilia Clarke**, President & CEO, Brooklyn Community Foundation; **Moderator:** **Saundra Thomas**, Vice President of Community Affairs, WABC-TV

## What's Your Rapid Response Plan?

Using real-life examples, this session will showcase how organizations across missions and verticals have put rapid response fundraising into effect to boost income and support their missions. At the same time, we will discuss ways to use giving days and other tactics to create urgency regardless of what's in the headlines.

### You'll learn:

- Ideas for when to enter topical/newsworthy conversation, and when to hold back
- A sample organization-wide rapid response plan
- Examples of how various channels can be used for rapid response

**Speakers:** **David Onate**, Director of Marketing & Creative, African Wildlife Foundation; **Matthew Reese**, National Digital Campaigns Director, Everytown for Gun Safety; **Julie Ziff Sint**, Vice President of Account & Strategic Services, Sanky Communications, Inc.; **Moderator:** **Paul Habig**, President, Sanky Communications, Inc.

*Joint session with Web, Tech & Social Media*

## Essential Basics of Fundraising

\*You are free to attend any session. No pre-registration required. Seating is first-come-first-seated.

### Getting to Goal: The Annual Development Plan

It's January. You've got a huge strategic plan to implement, tired colleagues, and jaded donors. The year stretches before you: what to do? We'll compare strategies and discuss ROI, metrics (how can they help you?), and how different-sized shops divide and conquer to get it all done.

#### You'll learn how to:

- Create an annual development plan
- Make sure the activities you promise works with the staff you have
- Set meaningful, realistic goals

**Speaker: John W. Hicks**, CFRE, Principal, DLBHICKS, LLC

### Effective Messaging

An organization's message can be difficult to present across all mediums and by different people. Learn how to collaborate effectively with your public affairs and marketing colleagues. Donors should see consistent messaging in all channels of communication.

#### You'll learn how to:

- Infuse best practices from fundraising into your overall messaging and your communication plan
- Avoid common challenges
- Communicate your core message

**Speaker: Kathy Kearns**, Vice President, Development and Communications, New York Genome Center

### Managing Volunteers: Keeping Your Sanity

Volunteers can be the ultimate force multiplier – but too often, they take time you don't have and fail to contribute meaningfully to the bottom line. In this session, designed for anyone with exposure to volunteers, we'll discuss how to turn all volunteers, including members of your board, into forces for good.

#### You'll learn how to:

- Build effective working relationships with your trustees and volunteers
- Navigate common pitfalls (including the dreaded volunteer time suck)
- Deploy and manage a range of volunteers, from board to event committee members

**Speakers: John Bacon**, Chief Development Officer for Planned Giving, The Metropolitan Museum of Art; **Lucille M. Ferraro**, Assistant Vice Provost for Development, Weill Cornell Medicine

### Stewardship by the Numbers

Learn techniques and strategies to use your donor database for targeted and data-driven donor engagement. This session will help you focus your stewardship efforts to maximize connections to your donors and marshal the resources that will position you for fundraising success.

#### You'll learn:

- To understand donor types and segmenting
- Tactics for effective engagement
- To use data to craft an effective and thoughtful stewardship plan

**Speaker: Jenny Mundell**, Senior Director of Development and Strategic Initiatives, RWJBarnabas Health

## Legacy Giving

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### The Basics of Charitable Giving: How to Help Donors Understand Their Options

This session is intended to help beginner to mid-career fundraising professionals understand the full array of charitable gifting options, including which options typically appeal to different types of donors, and which types of assets can be used to fund the different gifting vehicles. The goal is to enable these professionals to introduce donors to gifting options that the donors may not have known were feasible.

#### You'll learn:

- Current and future giving approaches
- In addition to cash, the types of assets that can be used to fund a charitable gift
- The form of charitable gift that is likely to appeal to different types of donors

**Speaker: Tracy Green Landauer**, Partner, Riker Danzig Scherer Hyland & Perretti LLP

### What Does a Planned Giving Donor Look Like?

Geared primarily towards beginner and mid-career fundraisers, this session examines the most common characteristics of planned giving donors and seeks to understand the differences between predictive factors for major gifts and planned giving.

#### You'll learn:

- The four most common connections planned giving donors have with your nonprofit
- The four most common statistical factors that can help you identify planned giving donors
- Trends in demographic factors associated with planned giving

**Speaker: Brian Peterson**, Director, Legacy and Gift Planning, Human Rights Watch

### All You Really Need to Know About Planned Giving You Learned in Kindergarten

Discover how the basic lessons we learned in kindergarten can help you add planned giving prowess to your toolbox. Whether you're new to planned giving or a seasoned specialist, Cosentino will show you how playing well with others can help you raise millions of dollars in new bequest intentions. Cookies, milk and planned giving are a true recipe for success!

#### You'll learn how to:

- Identify bequest prospects
- Work effectively with major gift colleagues
- Follow-up on planned giving inquiries

**Speaker: Meryl R. Cosentino, J.D.**, Senior Director of Gift Planning, Stony Brook University

### Cost-Effective Planned Gift Marketing

If you can spend at least half your time on planned giving and have a modest budget, this session is for you. Isaacson will demystify and explain smart ways to build a highly effective planned giving program that puts your organization on the map and helps you develop an impressive pipeline of future gifts.

#### You'll learn:

- How to identify, market, and close planned gifts on a budget
- Proven techniques to steward and communicate with planned giving donors
- How to convert revocable gifts to irrevocable gifts

**Speaker: Davida Isaacson**, President, Davida Isaacson Consulting, Inc.

## Major Gifts

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### Competing for the Top Philanthropic Dollar in New York

In today's ever-changing times, nonprofit organizations will look towards philanthropy with a renewed sense of urgency. Gain insights from leaders of some of the top fundraising nonprofit institutions in New York City as they discuss strategies for successful fundraising in a highly competitive landscape.

#### You'll learn:

- How forward-thinking institutions leverage time between major capital campaigns
- How the culture of perpetual campaigning is addressed by different nonprofit sectors
- How diversity in the NYC nonprofit sector can positively affect fundraising, governance and overall donor engagement

**Speakers: Susan Brady**, Chief Development Officer, Carnegie Hall; **Clyde B. Jones III**, Senior Vice President for Institutional Advancement, The Metropolitan Museum of Art; **Sarah Lesser Avins**, Senior Vice President & Chief Development Officer, NewYork-Presbyterian; **Jadrien Steele**, Vice President, Development, The New York Public Library; **Moderator: Robert Kissane**, Chairman, CCS Fundraising

### The Fundraising Power-Couple: The Relationship Between the CEO and the CDO

The relationship between the Chief Development Officer and the Chief Executive Officer is an essential one. Often this pair is responsible for cultivating, soliciting, and renewing some of the organizations largest gifts. Hear first-hand from some of the industry's "power-couples" on how they approach donor stewardship and solicitation, the critical board relationship, and special event fundraising.

#### You'll learn:

- Ways to ensure each leader supports the other, as well as their board, key volunteers, and staff
- About the success stories (and not-so-successful tales) of major fundraising asks
- Ways to cultivate those asks into renewals

**Speakers: Braden Lay-Michaels**, Chief External Relations Officer, StoryCorps; **Amit Paley**, CEO, The Trevor Project; **Robin Sparkman**, CEO, StoryCorps; **Calvin Stowell**, Chief Growth Officer, The Trevor Project; **Moderator: Seth Rosen**, Senior Major Gifts Officer, Lambda Legal

### Transformational Fundraising Campaigns

Increasingly nonprofits are aiming higher and reaching for funding at levels commensurate with the scale of the problems they are trying to solve. Transformational fundraising campaigns are becoming the norm. These campaigns vary in size, but share the common objective of raising unprecedented funds and dramatically accelerating the organization's capacity to make change in the world. Transformational campaigns can expand major gifts programs if leveraged correctly.

#### You'll learn:

- Transformational money requires a transformational idea
- To build upon the vision of inspirational staff and board leaders
- How to draw in prospects with the capacity and affinity to make the lead gift(s)

**Speakers: Steven M. Bernstein**, Chief Development Officer, Stony Brook Southampton Hospital; **Sara Conahan**, Partner and Senior Philanthropic Advisor, New Profit; **Lysa Ratliff**, Vice President, Corporate Partnerships, KaBOOM!; **Moderator: Craig Shelley**, CFRE, Managing Director, Orr Associates, Inc. (OAI)

### Portfolios, Prospect Pipelines, and Moves Management – Oh My!

Building a successful major gifts program is equal parts art and science. The art of major gifts is individually tailored relationship building. The science is the methodology used to build those relationships. Thus, the better your science, the more free you are to practice the art. That method involves creating portfolios, building donor and prospect pipelines, and moving donor relationships forward using a methodical moves management system.

#### You'll learn how to:

- Create your major donor portfolios based on three key criteria
- Rate and rank major donors and prospects in your pipeline for maximum effect
- Drive moves management activities forward based on the CAR model

**Speakers: Michael Delzotti**, CFRE, CSPG, President & CEO, University of Kentucky Markey Cancer Foundation; **Martha H. Schumacher**, CFRE, ACFRE, MInstF, President, Hazen and the Hazen Institute for Leadership Training

# Professional Growth

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## The CEOs Speak: How We Build Our Team

In this rare opportunity, our CEOs will share their insights into what they are really looking for when they hire the philanthropy team, beyond the professional track record. This is for anyone who wants access to top thought leaders. Bring your questions, and get your answers from our top CEOs.

### You'll learn:

- The top qualities a CEO looks for in building their team
- How a person who does not report to the CEO can get the CEO's attention
- How CEOs want to hear your ideas and feedback to address challenges and enhance the organization

**Speakers:** DeAnn Sarah Brady, Head, USGA Foundation at United States Golf Association; **George Forbes**, Executive Director, The Lucille Lortel Foundation; **Jilly Stephens**, Chief Executive Officer, City Harvest; **Moderator: Robert Wahlers**, Vice President for Development, Meridian Health Affiliated Foundations

## Making Technology and Social Media Work for You and Everyone in Your Organization

Nonprofits face competition for charitable dollars and need to strengthen donor relations, increase efficiency, and report outcomes transparently. Technology effectively improves fundraising areas such as database management, major gift solicitation, annual appeals and stewardship, and is a necessary investment that improves organizational performance. This session is perfect for mid-career and senior-level fundraisers.

### You'll learn:

- How technology can improve experiences for staff and donors
- How to meet your donors where they are – on their smartphones
- About tools that can simplify your day and maximize productivity

**Speakers:** Susan Davies, MS, Information Technology, Senior Vice President, Chief Development Officer, United Way of New York City; **Louis Higgins**, Senior Associate Technology and Management Consulting, RSM US LLP; **Victor Millsap**, Vice President, Information Technology Services, United Way of New York City

## How Millennials Really Think and Work

Millennials are the largest generation in the workforce and becoming one of the largest group of donors. As millennials continue to take leadership positions in nonprofits, it is important to focus on how we can work with them as well as learn from them. Our panel will provide insights on what it really means to be a millennial and what they have learned to launch their careers, as well as shed light on some of the myths around being a millennial.

### You'll learn:

- How to create a more friendly work environment for millennials
- What millennials are looking for when it comes to a career
- What type of position will fit your strengths (if you are a millennial)

**Speaker:** Nicole Federico, President, Cari Club; **Moderator:** Sarah Coulam, Director, Team EMPOWER, Smile Train

## How to Leverage Your Fundraising Career – For Your Personal and Professional Gain

As fundraisers, we develop skills to become: featured speakers, outstanding actors, and best-selling authors. This panel of experts will show you how you can use and enhance your existing skills for your professional and personal growth. This session is for anyone that wants to have that fulfilling life!

### You'll learn how to:

- Position your fundraising expertise to attract speaking engagements
- Write the story that's been inside you, whether a memoir or a must-read blog
- Get a guest appearance, commercial, or acting role you were born to have

**Speakers:** Sarah Beane Ricca, CFP, Vice President, Financial Advisor, Morgan Stanley; **Sherry Beck Paprocki**, President, American Society of Journalists and Authors; **Jenevieve Brewer**, Owner, Jenevieve Brewer Talent Management LLC; **Moderator:** Laura Fredricks, CEO and Founder, THE A&K

# Research

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## From Discovery to Major Donor

Discovery work can be exciting but can present some challenges. This is a case study of how the principal and major gifts team at the Planned Parenthood Federation of America and the Planned Parenthood Action Fund launched an innovative, data-driven culture of discovery. Hear the challenges and learning opportunities they encountered when they changed the culture of outreach. See how the team approached discovery work by harnessing data, research, and prioritizing outreach efforts.

### You'll learn how to:

- Navigate the successes and challenges of building and implementing a discovery program
- Empower both frontline and operations team members to prioritize discovery work
- Take small risks that lead to big changes and can shift conventional thinking

**Speakers:** Megan Heister, Director, Research & Prospect Management, Planned Parenthood Federation of America & Planned Parenthood Action Fund; **Jamaul Webster**, Principal & Major Gifts Director, Planned Parenthood Federation of America & Planned Parenthood Action Fund

## A Tool for Data-Driven Portfolio Reviews

Portfolio reviews are essential for ensuring that gift officers can focus on the best prospects, but they can be time-consuming for analysts. To make this process more efficient, we developed an Excel tool that enables analysts to make the same (and sometimes better) recommendations in a fraction of the time.

### You'll learn how to:

- Develop an organized, data-driven approach to portfolio reviews
- Build a portfolio review tool using Excel

**Speaker:** Lindsay A. Brown, Associate Director, Analytics, Dana-Farber Cancer Institute

## The Million Donor Question: How the ACLU has Identified Its Best Prospects During Times of Change

Since the 2016 election, the ACLU's base of supporters has quadrupled to about 2 million – the greatest outpouring of support in its nearly 100-year history. In this intermediate-level session, the presenters will discuss how the organization has identified and engaged its highest-priority donors and prospects.

### You'll learn how to:

- Create a structured approach for uncovering the highest-priority prospects among a large group of supporters
- Develop and apply prospect identification and prioritization tools
- Establish best practices for portfolio sizes, and prospect management and qualification

**Speakers:** Lexi Adams, Deputy Director of Leadership Gifts, American Civil Liberties Union (ACLU); **Jeff Vessels**, Director of Leadership Gifts, American Civil Liberties Union (ACLU)

## Asia: A Continent in Perspective

In recent years, U.S. institutions increasingly received transformative gifts from Asian donors. This session will provide an overview of the vast and varied wealth landscape in East and Southeast Asia; discuss how information is discovered, evaluated, and speculated upon; and provide insights on evaluating the gift capacity of Asian prospects.

### You'll learn:

- About overall wealth information and individual fortunes in East and Southeast Asian countries
- Valuable resources and tools to find Asia-related wealth information
- Techniques to help you evaluate an Asian prospect's gift capacity

**Speaker:** Linlin C. Reid, Senior Research Analyst, New York University

# Small Shop Organizations

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## Revitalize Your Events Through Portfolio Peer-to-Peer Fundraising

Rediscover the power of peer-to-peer fundraising by learning how to create a portfolio of options for your donors to maximize results and improve efficiencies. See how the Lymphoma Research Foundation created an umbrella platform for its events and DIY fundraisers to better accommodate its constituents. Created for mid-career to advanced fundraisers.

### You'll learn how to:

- Make a strategic evaluation of the impact of your fundraising events
- Sell your board on change
- Utilize technology to create a user-friendly experience for your constituents

**Speakers:** Sam Rogers, Senior Manager of Development, Lymphoma Research Foundation (LRF); **Jenna Stasiewicz**, Assistant Director of Lifestyle Events, Lymphoma Research Foundation (LRF)

## Finding Your Secret Sauce: How Understanding Motivation Can Drive Generosity

You've cleansed your database, segmented your donors and run a wealth screening but do you truly understand the motivation of your donors? Learn how to find your 'secret sauce' by leveraging motivation to improve donor experience and drive generosity. Developed for mid-career and advanced fundraisers.

### You'll learn:

- Places to find motivation in your current data set
- Easy and cost-effective ways to capture motivation
- The powerful impact of allowing donor motivation to drive experience

**Speaker:** Kelley Stewart, Executive Vice President, Pursuant

## Raising Major Gifts at Small Shops

This session will help fundraisers at small shops (operating budgets under \$10 million) structure a major gifts program. Our panelists will share what has worked and what has not, based on their experiences raising major gifts at mid-sized New York City nonprofits. The session is designed for mid-career professionals.

### You'll learn how to:

- Work with, and manage expectations of, staff and volunteer leadership
- Think creatively about major gifts prospecting and pipeline management
- Build a major gifts case statement and materials

**Speakers:** Marci Brenholz, Director, Development, NYU Langone Health; **Sarah Wendt**, Director of Major Gifts, Young Women's Leadership Network

## Facing the Facebook Facts: How Social Media Can Help Your Small Shop Stand Out

The Bergen County Protect and Rescue Foundation is a true no-kill animal shelter in northern New Jersey. With more than 10,000 local followers, the shelter uses their Facebook page to adopt out animals; recruit volunteers; and of course, raise money. In this session, designed for beginner/volunteer fundraisers, shelter staff will share their take-home tips on how to make Facebook work for your small shop.

### You'll learn how to:

- Create Facebook pages to promote fundraising events and campaigns
- Promote content that will get more likes and followers and donations
- Use Facebook messenger to communicate with your volunteers and donors

**Speakers:** Kristi Heller, Adoption/High-Kill Transport Coordinator, Bergen County Protect & Rescue Foundation; **Loryn Lipari**, Social Media Manager, Bergen County Protect & Rescue Foundation; **Doria Melendez**, Shelter Manager, Bergen County Protect & Rescue Foundation

## Special Events

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### Using Technology at Your Event

Many technology companies work with nonprofits to help enhance fundraising before, during and after an event. Some donors love the concept of giving in new ways and embrace the use of technology, while others might be more reticent. Learn about some of the newest ways to increase revenue through technology, while also discussing some of the potential challenges.

#### You'll learn:

- Some of the latest advances in event fundraising technology
- How to protect your donors and ensure the technology you are using is secure and safe
- The advantages and disadvantages of utilizing new technology at your event

**Speakers:** **Steven Feder**, Founder & CEO, CheckIn Tech LLC; **Gillian Leek**, Senior Vice President, Operations, NEXT for AUTISM; **Chloe Lipman**, Executive Director, Northeast Region, American Cancer Society; **Frances Salvo**, Manager of Events, FACES (Finding A Cure For Epilepsy & Seizures) at NYU Langone Health; **Moderator:** **Marisa Maltese**, Senior Manager of Special Projects, NEXT for AUTISM

### How to Keep the Conversation Going When the Event Ends

Learn how to keep your constituency engaged in the mission of your organization after the event is over. Find out how to get more from your event so you can carry that momentum into annual giving and build a stronger relationship with your donors. This session will also cover moving special event sponsors into more holistic, year-round partners.

#### You'll learn:

- How to engage donors in the organization's mission after the event
- To identify some tools to help you engage your constituency
- Concrete examples of how to integrate event sponsors into your organization's year-round strategic mission

**Speakers:** **JD Beebe**, Cofounder & CEO, ThankView; **Nicole Carrea**, Director, Development, National Kidney Foundation; **Elizabeth Lee**, Director, Individual Giving, National Multiple Sclerosis Society; **Moderator:** **Pamela Mohr**, Executive Director, FACES (Finding A Cure For Epilepsy & Seizures) at NYU Langone Health

### Staff Development: How to Manage Your Career and Plan for the Future

Many event development professionals want to develop their career in fundraising, yet are classified as "event people." This makes it difficult for them to move up or transition to a career in other fundraising areas. This session will explore ways to make yourself stand out. It will teach you critical skills and strategies in order to grow and flourish professionally.

#### You'll learn how to:

- Identify skills to help you transition to a new role
- Identify key players within your organization that can help serve as allies
- Translate your event experience into other critical skills when speaking with potential employers

**Speakers:** **Laura Avella**, Senior Division Director, Development Administration, NYU Langone Health; **Eboné M. Carrington**, MPA, FABC, Chief Executive Officer, NYC Health + Hospitals/Harlem; **Steve Goldberg**, Senior Consultant, DRG Inc.; **Beth K. Rowan**, Principal Gift Officer, Montefiore Health System / Albert Einstein College of Medicine; **Moderator:** **Erica Banyon**, MPA, Director, Donor Engagement & Communications, NYU Langone Health

### How to Foster Corporate Engagement

Corporate support is a key part of special events. Do you know how corporations decide which charities to support? To get support, you need to "woo" corporations. Understand what companies want to see in order to make your event stand out from the rest. Create a strategy to cultivate corporate sponsors for your events.

#### You'll learn how to:

- Cultivate and steward corporate event donors into lifelong friends and further engage them in your organization's mission
- Engage individuals who are in the public eye
- Communicate effectively with individuals in the corporate sector

**Speakers:** **Pei-Sze Cheng**, Reporter, NBC 4 New York; **Greg Levin**, Director, Global Philanthropy, BlackRock; **Robert Perretta**, Vice President, JP Morgan Chase & Co; **Stacy M. Rotner**, Corporate Responsibility Director, Sidley Austin LLP; **Moderator:** **Erica Banyon**, MPA, Director, Donor Engagement & Communications, NYU Langone Health

## Web, Tech, and Social Media

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### Do-It-Yourself (DIY) Fundraising – Is It Right for You?

Over the past 15 years, we have seen a shift from traditional organization-centric fundraising to peer-to-peer fundraising around structured athletic events such as walkathons and bike-athons. As participation in these events has waned, a growing number of organizations have turned to Do-It-Yourself (DIY) fundraising events in which individuals create and coordinate special activities to benefit their favorite nonprofit. Is DIY right for your organization? Our expert panel will share strategies for success – along with some caveats.

#### You'll learn:

- How to plan and roll out a successful DIY event
- How to leverage technology for scaling DIY events
- What pitfalls to avoid

**Speakers:** **Pam Sandonato**, Vice President, P2P Fundraising & Special Events, Covenant House; **Carla Warner**, Associate Director, Revenue Innovation

### The Holy Grail: Digital-First, Corporate-Scale Technology for a Modern Donor Experience

It's time for nonprofits to leverage engagement technology that matches the marketing sophistication of the for-profit world. We invite all audiences to come hear ACLU and Food and Water Watch talk about curating custom technology ecosystems around a single CRM to deepen relationships with resistance donors across all their channels.

#### You'll learn:

- The kinds of customer-experience strategies that for-profit companies are using, and how ambitious nonprofits are adapting these concepts to their supporter experience
- Different tech models available to nonprofits, and how a digital-first, "hub and spoke" model can be employed to give organizations scalable, commercial-grade campaign capabilities

**Speakers:** **Kate Kappel Haba**, Director of Salesforce Solutions, Food and Water Watch; **Stephanie Wecht**, Deputy Chief Operating Officer, American Civil Liberties Union; **Moderator:** **Alice Hendricks**, CEO & Founder, Jackson River

### Rapid Fire: Tips and Trends on Web, Tech and Social Media

In this fast moving session on Web, Tech and Social Media, a panel of experts will provide bite-size tips, allowing the audience to come away with practical and applicable ideas for improving their email, social media, digital acquisition and online renewal campaigns. This session will show you snapshots of fresh techniques and tools that are proving successful for other organizations. You will also have a chance to ask the experts for advice on your specific issues.

#### You'll learn:

- The latest techniques in online fundraising that are proving successful for nonprofits
- Fresh ideas for harnessing the power of remarketing and social media advertising
- Which new tech developments and trends the experts are talking about

**Speakers:** **Jean Qiao**, Digital Marketing Officer, Women for Women International; **Kevin Scally**, Director, Digital Marketing, Smile Train; **Emily Scher**, Manager, Digital Strategy and Marketing, Memorial Sloan Kettering; **Moderator:** **Paul Habig**, President, Sanky Communications, Inc.

### What's Your Rapid Response Plan?

Using real-life examples, this session will showcase how organizations across missions and verticals have put rapid response fundraising into effect to boost income and support their missions. At the same time, we will discuss ways to use giving days and other tactics to create urgency regardless of what's in the headlines.

#### You'll learn:

- Ideas for when to enter topical/newsworthy conversation, and when to hold back
- A sample organization-wide rapid response plan
- Examples of how various channels can be used for rapid response

**Speakers:** **David Onate**, Director of Marketing & Creative, African Wildlife Foundation; **Matthew Reese**, National Digital Campaigns Director, Everytown for Gun Safety; **Julie Ziff Sint**, Vice President of Account & Strategic Services, Sanky Communications Inc.; **Moderator:** **Paul Habig**, President, Sanky Communications, Inc.

*Joint session with Direct Response*

## Workshops

\*You are free to attend any session. No pre-registration required. Seating is first-come-first-seated.

### 10:45 AM – 12:00 PM

#### Creating a Powerful Case for Your Capital Campaign

How do you brand your capital (or other very large) campaign so it inspires donors to act, and without pilfering from annual giving? What printed or digital tools do you need in the quiet and public phases? How do you inspire major donors to become campaign ambassadors? This session will focus on developing your case for support to close big gifts with confidence. It is appropriate for anyone who is new to capital campaign planning and management and anticipates working on a campaign with a target of 5 to 500 million dollars.

#### You'll learn:

- How to approach branding your capital campaign so it aligns with your organization's voice but doesn't conflict with your annual giving
- What collateral is most important during quiet and public phases
- How to use the case for support to engage your lead donors and set them up to ask others with confidence

**Speaker:** **Sarah Durham**, CEO, Big Duck

### 2:00 PM – 3:15 PM

#### The Cat's Meow: Performance Coaching and Team-Building That Drives Results

This fun and interactive workshop for managers emphasizes strategies for building and sustaining high performance development teams. Utilizing applied personality theory and presented through the humorous lens of "cat behavior," you will leave with new tools to coach your team to work effectively with one another and deliver even greater results.

#### You'll learn how to:

- Identify strengths and behavioral patterns that contribute to individual and team effectiveness
- Effectively coach members of the fundraising enterprise using strategies that grow and retain them
- Use the insights gained about your own coaching and managerial style to improve rapport with, and between, those with different style preferences

**Speaker:** **Jeanne Starr**, Assistant Dean of Development, NYU Steinhart