

FUND RAISING DAY

IN NEW YORK

June 27, 2014
@ The Marriott
Marquis
New York City

America's
Premier
One-Day
Conference
on Philanthropy



Conference presented by the New York City Chapter

Advanced Fundraising

Sponsored by:


Campaign Best Practices...Many Practices!

Mega-campaigns are no longer a novelty. With this new normal, how does a medium-sized or smaller organization prepare for and execute an ambitious capital or endowment campaign? A case study of Jazz at Lincoln Center's campaign accompanied by an exploration of principles of leadership development, engaging new constituencies and aligning with strategic planning reveals best practices for your organization's next campaign.

You'll Learn:

- How to build your campaign on your current strengths
- How to build campaign leadership from inside and outside of your board
- How to engage your current and new constituencies in your next campaign

Moderator: Dan Blakemore, CFRE, Assistant Director of Development, International House; **Speakers:** Dwayne Ashley, Vice President, Development, Jazz at Lincoln Center; Robert Kissane, President, Community Counseling Service LLC

Talent Management Critical Challenges

Fundraising success requires more attention towards finding, managing and keeping talented staff. Hiring the right people, developing their skills and showing appreciation for their labor will go a long way towards your fundraising goals.

You'll Learn to:

- Make the case for investing in staff
- Develop the next generation of fundraising managers
- Argue for support for staff development
- Develop the right skill set among your team

Moderator: William M. Weber, Ed.D., President, Development Guild/DDI; **Speakers:** Jay Budner, Executive Director for Strategic Talent Management, Alumni and Development, Columbia University; Carlos Flynn, University Dean for Institutional Advancement, The City University of New York

Joint with Major Gifts track

Getting to Yes: The Role of Outcomes Assessment and Evaluation in Preparing Winning Proposals

Institutional (and individual) donors want to measure the impact of their grant making. Communicating outcomes to prospective funders has become imperative. Hear experts explain outcomes assessment and evaluation. Whatever your organization's mission, get tips on measuring and speaking about your success to funders and constituents.

You'll Learn:

- The meaning of outcomes assessment and evaluation
- How to talk with funders and internal constituents about outcomes assessment and evaluation
- How to tap expertise needed for your organization to integrate outcomes assessment and evaluation into your proposals

Speakers: Benjamin Kim, Vice President for Strategic Development, Public Health Solutions; Dr. Ruth Finkelstein, Associate Director of the International Aging Center, Columbia Aging Center; Dr. Andrew Grant, Assistant Vice President for Institutional Advancement, Hebrew Union College - Jewish Institute of Religion; Sarah Winters, Assistant to the President and Program Assistant, Alfred P. Sloan Foundation

Joint with Corporate & Foundation Giving track

What Are the Wealthy Thinking Now?

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You'll Hear:

- Current observations built on conversations with philanthropists living in our region
- National trends followed by *The Chronicle of Philanthropy*
- How to consider this information in your fundraising

Moderator: Stacy Palmer, Editor, *The Chronicle of Philanthropy*; **Speakers:** Robert Frank, Reporter & Editor, CNBC; Glen MacDonald, President, Wealth & Giving Forum

Joint with Major Gifts, Research, Small Shop Organizations tracks

Corporate and Foundation Giving

Sponsored by:


Which Way Do I Go? Navigating the Labyrinth of Corporate Philanthropy

Dream of sponsorship for your gala? Ever wonder how cause marketing marriages are made? Or are you just trying to tap into corporate philanthropy? Corporations are partnering with nonprofits every day, but how do these relationships start? In this session, three experienced fundraisers will help you understand corporations, their giving strategies and how to build rewarding partnerships.

You'll Learn:

- Tips for navigating the complexities of corporate giving
- What types of corporate funding are right for your organization
- How to find the most "natural partners" for your work

Speakers: Gregory Boroff, CAE, CFRE, Executive Director, Friends of Hudson River Park; Debbie Kellogg, Vice President for External Relations, Re:Gender; Jonathan Sandvick, Fundraising Consultant; Donna Wall, CFRE, President, Wall Consulting Services

Real Time Grantmaking

Observe grantmaking in action! An expert panel of real-world funders will review and deliberate in front of an audience. FRDNY registrants are eligible to apply for a mini-grant to be awarded during this session. Applicable to nonprofit leaders of all levels.

You'll Learn:

- Various approaches funders take when reviewing proposals
- Red flags funders notice in applications
- The importance of communicating your impact as well as activities

Speakers: JuWon Choi, Director of Learning, Association of Junior Leagues International, Inc.; Camille Emeagwali, Senior Program Officer, The New York Women's Foundation, Inc.; Jonathan Horowitz, Program Officer, J.P. Morgan Private Bank, Private Foundation Services; Yancy Ruben Garrido, Senior Program Officer, The Clark Foundation; Patricia Swann, Senior Program Officer, The New York Community Trust

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Joint with Advanced Fundraising track

Getting in the Door (and Staying There)

What are funders REALLY looking for in new grantees? What makes a proposal "leap out" from a mountain of requests? Do we spend so much time looking for new sources of funding that we forget the critical importance of nurturing the relationships we have? Foundation funders will discuss how to stand out when looking for funding and, more importantly, what funders look for in "successful" grantees.

You'll Learn:

- How to distinguish yourself (in 2000 words or less!) in an increasingly competitive field
- What funders consider a successful relationship
- How to make the case for renewed funding

Speakers: Patricia Jerido, Program Officer, Special Initiatives and Partnerships, Open Society Foundations, U.S. Programs; Wilma Montañez, Program Director for Reproductive Rights, Jessie Smith Noyes Foundation

Direct Response

Sponsored by:


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 To:

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

Moderator: Amy Tripi, President, Tripi Consulting Associates, Inc.; **Speakers:** Lori Burns, Senior Vice President, Russ Reid; Christine Shilosky, Senior Account Executive, Mal Warwick/Donordigital; Luke Vander Linden, Vice President & Senior Marketing Director, Carl Bloom Associates

Shift Happens: How to Ensure Upgrading Your Donors is a Smooth Move

Upgrading donors is essential to having a strong fundraising program. Increasing support from current donors is generally far easier and less expensive than acquiring new donors. But the upgrading process isn't just about asking for more money. How can you steward your donors to ensure a smooth, donor-centric transition to higher levels of giving? Hear two fundraising experts discuss how they are able to accomplish this by creating a "strong synergy" between direct response and major gifts.

You'll Learn:

- How to alleviate the friction that can occur between the direct response and major gift departments when targeting donors for upgrades
- How to use analytics to determine which donors are your best prospects for upgrading
- Effective strategies for upgrading donors to mid-level and major gifts and how to create a seamless flow

Moderator: Giselle Holloway, Director, Direct Response Marketing, International Rescue Committee; **Speakers:** Angel A. Aloma, Executive Director, Food for the Poor; Kevin Moran, Owner, Integral, LLC

Marriage Counseling: How Fundraising and Branding Can Live Happily Ever After

For many nonprofits, there can be friction between the development and marketing departments. While branding guidelines can be critical for general messaging, they can sometimes be at odds with effective fundraising. How can you maximize direct response efforts while still working within the corporate brand? Hear how two nonprofits have successfully adapted branding for effective fundraising. Learn what works — and what doesn't — so you can create the most effective fundraising strategies possible.

You'll Learn:

- How branding and building brand equity supports charitable messaging
- When to relax brand guidelines to ensure the best fundraising results
- How to balance the needs of branding and fundraising across channels

Moderator: Lisa Maska, CFRE, Partner, Lautman Maska Neill & Company; **Speakers:** Gary Laermer, Senior Vice President & Chief Development Officer, YMCA New York City; Heather Wallace, Vice President, Marketing, City Harvest

charity: water's Success Story

Frequently nominated as one of the world's leading digital nonprofits, charity: water was the first nonprofit to have 1 million Twitter followers and has 60% of its fundraising come through digital channels. In just 7 years they have provided clean and safe drinking water to over 3 million people and raised over \$100 million. In this session, Paul Young, Director of Digital, will outline the strategy that has powered this incredible growth.

You'll Learn:

- Some of the essentials to build an innovative fundraising program
- How to integrate different channels
- How to use social media to its fullest capacity

Speaker: Paul Young, Director of Digital, charity: water

Joint with Web, Tech, Social Media track

8:45 AM – 10:00 AM

10:45 AM – 12:00 PM

2:00 PM – 3:15 PM

4:00 PM – 5:00 PM

Positioning Your Organization for Fundraising Success: An Overview

This session will focus on the importance of having a diversified funding base for your organization. You will learn ways to: build and expand a base of individual, foundation and corporate supporters; engage your board members to serve as a partner in the development process; and create a strong annual fund program that can be leveraged and grown into a major gifts program.

You'll Learn:

- The importance of a setting goals through a fundraising plan
- How to increase, upgrade and diversify your donor base
- Strategic ways to engage your donors and build strong relationships internally and externally

Speaker: **Robin H. Rosenbluth**, CFRE, Deputy Director of Philanthropy, Principal Gifts, The Nature Conservancy

It's Not Just About Galas: Exploring Other Special Event Options

Do you want to learn about different and exciting event fundraisers? Join this session and hear how other nonprofits have used the fundamentals of event fundraising in settings other than your traditional dinner, including a golf outing, walk and cycling event.

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- Produce an exciting event that people will want to support year after year

Moderator: **Laurie Krotman**, Co-President, Special Events Unlimited;
Speakers: **Lanie Etkind**, Director of Development, United Hospice of Rockland; **Marci Kurtz**, Director, Helen Hayes Hospital Foundation; **Katie Kotkins**, Director, Fundraising Events, Memorial Sloan Kettering

Joint with Special Events track

Relationship Building: The Essence of Personal Fundraising

Relationships are the foundation of Major Gift fundraising. No one plays a larger role in this dynamic than the major gift officer. Building solid relationships requires more than being likeable. Strategy is involved. Creating your personal brand is critical. Knowing when and how to involve others is essential. This session will show you how to get to "the ask."

You'll Learn How To:

- Advance donor relationships from introduction to mutual respect and esteem
- Build a personal relationship and an institutional relationship at the same time
- Solidify a relationship by delivering the joy of philanthropy

Speaker: **Richard Brown**, Clinical Assistant Professor, George H. Heyman Center for Philanthropy and Fundraising, New York University

How to Ask When You Aren't Asking

In an increasingly competitive fundraising environment, donors expect to be engaged deeply and meaningfully in the work of the nonprofits they support. Making the ask and retaining donors becomes easier when we have consistent interactions with supporters that don't involve fund requests. This session will demystify stewardship and offer practical ideas for involving donors in your organization's mission.

You'll Learn:

- Why stewardship is becoming even more important than new donor acquisition or prospecting
- What kind of involvement donors want
- How to build engagement programs that are donor-centric and meaningful

Speaker: **Marci Brenholz**, Deputy Director, Development, U.S. Fund for UNICEF

Major Gifts

Securing, Preparing & Reporting on Donor Meetings

Are you setting yourself up to fail? If you are setting donor meetings with vague goals the answer is YES. Learn how success starts with securing a meeting that allows you to accomplish your goals, how important preparing for a meeting can be for leading the conversation, and what is required after the meeting to start to build a lasting relationship between your donor and your organization.

You'll Learn:

- How securing the meeting directs the outcome
- What is the crucial information to capture
- What to prepare for a successful meeting

Moderator: **Arik Thormahlen**, Associate Director of Development, Mount Sinai Health System; **Speakers:** **Roshma Azeem**, Director of Development, The Friedman Brain Institute, Mount Sinai Health System; **Ezra Shanken**, Director, Emerging Leaders & Philanthropists, UJA Federation of New York; **Susan Murray**, National Senior Philanthropic Advisor, Year Up

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Joint with Advanced Fundraising track

New York Board Giving: Adding Facts to Anecdotes

This spring, Marts & Lundy releases its second research project involving top nonprofits in New York. The results reveal characteristics of effective fundraising boards. To ground this research in practicality, a development officer working in a medium-sized nonprofit will also discuss what is working in building their fundraising board.

You'll Learn:

- The four characteristics associated with higher board giving
- How nonprofits of different sizes and starting points approach board development and expectations
- How to set internal expectations as to how board development unfolds through time

Moderator: **Patrick O'Connell**, Adjunct Faculty, Columbia University;
Speakers: **Lauren Marzo**, Chief Development Officer, The Viscardi Center; **Nancy Raybin**, Senior Consultant & Principal, Marts & Lundy; **Sarah W. Williams**, Lead Analyst & Consultant, Marts & Lundy

Joint with Research track

What Are the Wealthy Thinking Now?

In this age of mega-gifts, venture philanthropy, and personal philanthropic branding, you need to hear directly from the donors. Find out how the changing landscape is influencing decisions, what giving habits persist, and what new trends are developing.

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Joint with Advanced Fundraising, Small Shop Organizations, Research tracks

Research

Innovative Ideas: LinkedIn Uses for Fundraising

Did you know that LinkedIn includes a section for prospects to list their "causes"? Have you sent targeted communications via LinkedIn for your year-end appeal? Join this session for advanced strategies that will improve your organization's proactive use of this crucial channel. Session will include discussion of best practices for using LinkedIn as a research tool.

You'll Learn:

- Best Practices for building and utilizing your organization's following
- Strategies for researching, prospecting and networking
- How to find skilled volunteers and identify new board members

Speakers: **Sally Boucher**, CFRE, Director of Research, WealthEngine; **Qaya Thompson**, Development Prospect Research Analyst, Yale-New Haven Hospital; **Jeremy Woolf**, New Media and Corporate Communications Director, CCS

Visual Analytics: Empower Your Organization through Interactive Data

In the era of "big data" and fast-paced decision making, data visualization provides a way of communicating information in accessible ways. We can learn from pioneers who leveraged visualization to organize and present information in a new way. Data visualization encourages the reader to engage and learn, turning data into multidimensional analysis. We'll discuss visual analytics trends, opportunities, and approaches.

You'll Learn:

- How to bridge the data divide between analysts and fundraisers
- Strategies for how to integrate data visualization into your organization
- How to empower your colleagues to interact with and "see" their data

Speakers: **Heather Campbell**, Associate Director, Development Research Analytics, Princeton University Office of Development; **Suzanne Franzino**, Director of Development Research, Princeton University Office of Development; **Alison Sommers-Sayre**, Executive Director of Development Information Strategy, Princeton University Office of Development

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Joint with Major Gifts track

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Joint with Advanced Fundraising, Major Gifts, Small Shop Organizations tracks

Can You Hear Me Now? Getting the Most Out of Your Communications

Letters, phone calls, emails, social networking, the list goes on. With so many ways to engage our constituents, but with little staff (if any) and time, how do we ensure our messaging and conversations are being communicated with maximum impact? Hear from three seasoned fundraising professionals as they share their strategies and approaches.

You'll Learn How To:

- Prioritize donor lists and organize a clean and effective outreach plan
- Respond to a "no"
- Develop successful stewardship strategies that help ensure the next gift and those beyond

Speakers: **Edward Griffin**, Alumni Relations Director, Trinity School; **Sharon Camlic**, Executive Director, Sharon Robinson Camlic Grants Counsel; **Betsy King Militello**, Executive Director, National Alliance for Musical Theater

Board Relations, Going from Good to Great

In this session, our panelists will share with you how they successfully engaged, encouraged and trained their boards. Learn how to use their connections, or energy to assist with fundraising, events, and cultivation. We will also explore how to get the best from the Development Committee.

You'll Learn:

- Strategies to engage and train your board to assist in fundraising
- Tips for getting the most from your Development Committee
- Ideas for how your board can help in cultivation

Moderator: **Holly Bellows**, CFRE; **Speakers:** **Allison Chernow**, Director, External Affairs, Bronx Museum of the Arts; **Helen Gates**, Executive Director, The Rye Arts Center; **James W. N. Murphy**, CFRE, Managing Program Director, Episcopal Church Foundation; **Dart Westphal**, Organizational Development Consultant, Support Center for Nonprofit Management

Setting Up Your Small Shop for Success

Clarifying and achieving your goals, while maintaining efficiency, is vital to small shop fundraising. With time being our #1 asset, how do we ensure we're getting the most out of our time spent? In this session, you'll hear from three fundraising professionals about their approach to the year and the strategies they use to help plan, set goals, and stay on track.

You'll Learn How To:

- Identify fundraising sources, set priorities, and track net steps
- Maximize the potential of your annual gala or events
- Manage situations and individuals that derail priority work

Moderator: **Edward Griffin**, Alumni Relations Director, Trinity School; **Speakers:** **Paula Barbag**, President & Founder, Consulting for a Cause; **Bruce Lineker**, Director of Development, The Kitchen

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Joint with Advanced Fundraising, Major Gifts, Research tracks

The Event Pipeline: Turning Events Guests into Major Donors

There are many reasons to have a Special Event in addition to raising unrestricted funds: meeting prospective donors, securing new Board members, showcasing your organization, and more. You must coordinate your entire development department to maximize benefits, including but not limited to Planned Giving, Major Gifts, Grants, Marketing, Board. In this session, you will hear from experts in the field on how they effectively mine for gold before, during and after their event.

You'll Learn How To:

- Secure a major gift through cultivation at your event
- Expand your Board through your event
- Add new donors to your roster through your event

Speaker: **Patricia Clemency**, President & CEO, Make-A-Wish Metro New York and Western New York

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Joint with Essentials of Fundraising track

Auctions and Raffles and Cash Calls - Oh My!

Do you want to add significant revenue to your event bottom line the night of the event? Do you want to spend less than 1,000 hours making it work? A seasoned panel of special event experts will share their experiences and strategies in maximizing revenue through these potentially lucrative avenues.

You'll Learn How To:

- Secure and sell auction items that will create excitement and significant revenue
- Run a major Cash Call in 15 minutes, raising lots of money without embarrassing anyone
- Organize your Auction and Raffle effectively

Moderator: **Mary Fiore**, Associate Director, Institutional Events, Columbia University Mailman School of Public Health; **Speakers:** **Neill Bogan**, Director of Development and Communications, New York Common Pantry; **Tracey Drayer**, Executive Vice President, Nassau Region of Hadassah; **Yolanda F. Johnson**, Development Manager, Princess Grace Foundation USA

I-Plan: Meet Nonprofits Who Have Integrated New Millennium Event Technology Into Their Events

See how you can increase special event revenue directly from people who have used innovative technology in running their events. This panel will share their history of using devices for dollars.

You'll Learn How To:

- Use text-to-pledge technology to increase revenue at your event
- Incorporate savvy registration procedures to streamline your check-in process
- Generate extra revenue at minimum cost using online journals

Moderator: **Richard Martin**, Director of Development, Ronald McDonald House of NY; **Speakers:** **Mandy Groff**, Director of Development, Boys & Girls Clubs of America; **Alyssa Kind**, Assistant Director, Office of Special Events, Mount Sinai Health System; **Nicole Piampiano**, Coordinator for Advancement Events, Stony Brook University

Responsive Design: Your Story as Intended

Do you keep hearing this catchy phrase: responsive design — even found yourself googling your way through for the meaning? Whether you've written your first term paper on it or are just coloring in your first book, you'll leave this session with a grasp on theory and implementation. Most importantly, you'll find out how to keep your constituents engaged across every platform and device.

You'll Learn:

- Best practices to ensure a great user experience on your website
- Tips and tricks to optimize your emails on any device
- How to ensure the success of your mission in an ever-changing digital world

Speakers: **David Onate**, Senior Online Communications and Marketing Manager, African Wildlife Foundation; **Regina Weick**, Associate Creative Director, Sanky Communications Inc.

Rapid Fire: Tips and Trends 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 online, social media and mobile fundraising campaigns. Whether you are new to fundraising or a seasoned professional, you'll come away with snapshots of the fresh techniques and tools that are proving successful for other organizations. You will also have the chance to ask the experts for advice on your specific issues.

You'll Learn:

- The latest techniques in online fundraising are proving to be successful for nonprofits
- Fresh ideas for harnessing the power of social media and mobile communications
- What new tech developments on the horizon the experts are talking about

Moderator: **Paul Habig**, Executive Vice President/Creative Director, SankyNet; **Speakers:** **Jocelyn Harmon**, Vice President of Development, The Global Fund for Children; **Jana Waterworth-McAndrew**, Associate Director, Digital Engagement, Women for Women International

From Social Networks to Social Change

Used by governments, organizations and individuals all over the world, social media has demonstrated itself as a powerful online tool with incredible offline potential: mobilizing impassioned individuals and transforming them into empowered advocates for a cause. Join us for an intimate, in-depth discussion about the Humans Rights Campaign's use of social media and online fundraising to galvanize supporters of marriage equality. Our discussion will include the organization's use of its equal sign logo, which was chosen as "Symbol of the Year" by Stanford's Symbolic Systems Program. Audience participation is encouraged.

You'll Learn How:

- To create a powerful social movement while also expanding your fundraising program and donor base
- Social media can be used for community-building and fostering relationships with current donors

Moderator: **Paul Habig**, Executive Vice President/Creative Director, SankyNet; **Speakers:** **Ann Crowley**, Membership & Online Strategy Director, Human Rights Campaign; **Dane Grams**, Director of Direct Response & Monthly Giving, Human Rights Campaign; **James Servino**, Associate Director Online Fundraising and Advocacy, Human Rights Campaign

charity: water's Success Story

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- How to integrate different channels
- How to use social media to its fullest capacity

Speaker: **Paul Young**, Director of Digital, charity: water

Joint with Direct Response track

Making the Ask 1: Role-Playing/Style Sessions

By far, the most effective fundraising tool is the face-to-face ask. There are many ways to ask prospects to give to your cause. In this interactive role-playing session led by five highly regarded professionals, you'll have the opportunity to experiment with different styles of face-to-face asking. All levels are welcome.

You'll Learn How To:

- Approach a prospect for a solicitation meeting
- Conduct a face-to-face ask
- Overcome objections

Speakers: **Daniel Butler**, President, Daniel P. Butler Company; **Marc Cincone**, Director of Development, Tilles Center for the Performing Arts, New York University; **Ed Rodbro**, Charitable Estate Planning Director, American Heart Association; **Nina Smith**, Major Gifts Officer, New York University

Making the Ask 2: Role-Playing/Styles Session

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It's All About Communication

It happens to everyone – miscommunication or, worse yet, non-communication between departments, which can result in minor or major fundraising disasters. It can happen with events, prospect research, program funding, or cause confusion over who is working with which donor. This role-playing workshop will explore real-world scenarios where communication snafus have caused problems – in small group discussions you will come up with a quick solution, and a long term plan to make sure it doesn't happen again!

You'll Learn How To:

- Improve communication between departments
- Avoid common problems when working at a large complex organization
- Implement project management best practices

Speakers: **Suzanne Barlow**, M.L.I.S., Director of Prospect Research Development and Alumni Relations, Pace University; **Darcy Hector**, Director of Marketing & Development, Queens Botanical Garden; **Christine Hughes**, Director of Individual Giving & External Relations, Westchester Medical Center Foundation; **Vikki Jones**, CFRE, Planned Giving Officer, Weill Cornell Medical College; **Andrea Newman**, Director of Development, Public Relations & Communications, Greenwich House

High-Performing Boards: Creating the Context for Change

What is it that makes an exceptional Board? What can you do as a development professional to create the Board and staff dynamic of a high-performing team? This interactive, peer-to-peer workshop offers counsel, tools and examples from Hartley Consulting, Inc., with 30 years experience in building Boards for nonprofits large and small. Join the discussion with your burning questions and lessons learned about Board relationships, leadership and development.

You'll Learn To:

- Establish trust in working with the Board nominating or governance committee
- Collaborate with the Board on good governance, recruitment and succession planning
- Coach board members in their role as articulate advocates and resource sustainers

Speaker: **Linda Hartley**, President, Hartley Consulting, Inc.

Social Media SMART Goals

Learn to adapt and use social media technologies appropriate for your fundraising goals. Customized for nonprofits, this collaborative workshop will encourage you to explore your social media plan using Specific, Measurable, Attainable, Realistic, and Timely goals to fit your organization's development plans. Consult with experts and your peers to develop a strategy your organization can implement right away.

You'll Learn How To:

- Choose the right social media channels for your fundraising goals
- Develop a plan to get a smart start on your social media strategy
- Implement best practices in social fundraising

Speakers: **Daniel Buckley**, Director, eRevenue, American Cancer Society; **Howard Greenstein**, President, Harbrooke Group; **Marcia Stepanek**, New Media Faculty, New Media Advisor and Curator, Philanthropy 3.0, The Heyman Center's Speaker Series on Disruptive Innovation in the Giving Sector, New York University Heyman Center for Philanthropy and Fundraising; **Tom Watson**, President, Cause Wired LLC

Maurice Gurin Memorial Scholarships

The New York Chapter of AFP is committed to the education of fundraisers in the tri-state area. We have a limited number of Maurice Gurin Scholarships available for those organizations with budgets under \$1 million and limited development resources. For an application and guidelines, go to frdny.org or email frdny@nycafp.org. *Applications are due May 9, 2014.*

Evaluating Your Proposal

Haven't you ever wondered what program officers go through when reviewing hundreds of proposals? How do they make the critical decisions on who gets the grant? This role-playing workshop will put you in the role of a program officer, and you will review selected proposals to decide who will be the grantee. (NOTE: no real grants will be awarded – this is role-playing) Learn how decisions are made at this workshop facilitated by program officers from five NYC metro foundations.

You'll Learn:

- What goes into the review process for proposals and how relationship building can influence these decisions
- Why it is so important to read guidelines and get materials in before deadlines
- What funders look for in "successful" grantees

Limited attendance to 60 – Pre-registration required

Speakers: **Marian Conway**, Ph.D., Executive Director, NY Community Bank Foundation; **Laurie Dien**, Senior Program Officer, The Pinkerton Foundation; **Cindy Krezel**, Program Officer, NY Community Bank Foundation; **Alison N. Yu**, Program Officer, The Hearst Foundation

Making Plans for Planned Giving

Encouraging planned gifts is popular among universities, hospitals, museums and community foundations. Funds generated through planned gifts can be dedicated to current funding needs as well as capital projects and endowments. Planned Giving should be part of every development program regardless of size, mission, or in-house expertise. This Q&A workshop is designed to help you determine the level of planned giving activity appropriate for your organization.

You'll Learn:

- Tips for starting a planned giving program and growing current programs
- How to start the planned giving conversation with supporters
- Exploring a career in planned giving

Speaker: **Ed Rodbro**, Charitable Estate Planning Director, American Heart Association; **David Stiles**, Director of Planned Giving, University of Oxford North America

Fundraising Day in New York delivers dynamic programming for fundraisers at all levels of experience and in all types of organizations

NEW!

The Art & Science of Relationship Mapping (Breakfast Meeting)

There is a new way for nonprofit executives to reevaluate, redefine, and potentially revolutionize their fundraising efforts – Relationship Mapping. We'll show you the new technology that can create greater efficiencies, reduce costs and improve your fundraising efforts. By understanding prospective donors, you can shorten fundraising cycles and leverage the relationships of your Trustees, Board Members and existing donors. With aggressive campaign goals and increased competition, this content can be developed for anyone in nonprofit leadership positions looking to discover new ways to drive their organization's mission forward. *Sign-up when you register for FRDNY. This breakfast is from 7:30-8:30am.*
Sponsored by Relationship Science

NEW!

Getting Presents Rather than Gifts (Breakfast Meeting)

In-kind donation strategy is one of the most singular and most overlooked fundraising strategies. Donations of goods are often viewed as stepping on possible cash donations, cumbersome, unhelpful and not worth the time. Here's how to utilize your in-kind strategy to gain new donors, revitalize your annual fund, and help cover operational costs. *Sign-up when you register for FRDNY. This breakfast is from 7:30-8:30am.*
Sponsored by YouGiveGoods

NEW!

Peer to Peer Fundraising: Past, Present and Future (Breakfast Meeting)

This session will give you an overview of the history of Peer to Peer Fundraising, the current state of the market including a review of the Annual Top 30, and a view of where this powerful market segment is heading. **Speaker:** David Hessekiel, President, Run Walk Ride Fundraising Council *Sign-up when you register for FRDNY. This breakfast is from 7:30-8:30am.*
Sponsored by Generosity Series

Real Time Grantmaking Session

The New York City Chapter of the Association of Fundraising Professionals invites nonprofit organizations to apply in advance for a grant to be awarded during a Real Time Grantmaking session at Fundraising Day in New York 2014, from 10:45 to 12:00 noon. Among the applications that meet the guidelines, three finalists will be selected for public review and discussion by an expert panel of real-world funders. At the end of the session, three grants in the amount of \$5,000, \$2,500 and \$1,000, plus a scholarship to Columbia University Business School: Programs in Social Enterprise in Executive Education, will be awarded.

Partners in Your Success

We wish to thank the following sponsors for their support of our chapter and their participation in Fundraising Day in New York.

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FRDNY Photographer
Jerry Lacay

*as of February 22, 2014

Interested in sponsorship? Contact Emily Brochstein at ebrochstein@kellencompany.com or call 212.297.2180

Network All Day in the SolutionsCenter

To make our events successful, our systems work, and our programs effective, we often need to create teams outside the office. The companies exhibiting in the *SolutionsCenter* are on the front lines of fundraising every day, helping nonprofits maximize their potential. Visit the *SolutionsCenter* any time during the day to network, brainstorm, and find the resources for your unique fundraising needs.

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- Education
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Dave Isay, Founder & President, StoryCorps



Harvey Wang photographer

The simple beauty of one's personal story has always intrigued Dave Isay. As a young child, he used to dream of having tea with older people and hearing their stories. "I was a very strange kid," he said. After graduating New York University, he happened into a career as a radio documentary producer and produced a wide variety of programs for NPR. These included Yiddish Radio Project, salvaging recordings of old Yiddish radio programs, and "The Execution Tapes," in which he uncovered audio recordings of electrocutions carried out by the state of Georgia. Inspired by Works Progress Administration recordings of the 1930s, in 2003 he set up a sound booth in Grand Central Station to allow ordinary citizens to record their life story. And so StoryCorps was born. Today, StoryCorps recordings are archived at the American Folklife Center at the Library of Congress and in hundreds of thousands of private homes across America.

"I'm amazed every day at the impact that recording and listening to these interviews makes on people's lives. This is a project that—I hope—restores and strengthens people's faith in humanity," said Isay.

Isay is the recipient of numerous broadcasting honors, including six Peabody Awards and a MacArthur "Genius" Fellowship. He is the author/editor of numerous books that grew out of his public radio documentary work, including several StoryCorps books: *Listening Is an Act of Love* (2007), *Mom: A Celebration of Mothers from StoryCorps*, and *All There Is: Love Stories from StoryCorps* (2012)—all *New York Times* bestsellers. StoryCorps' most recent book is *Ties That Bind: Stories of Love & Gratitude from the First Ten Years of StoryCorps* (2013).

Career Mentoring

Today is the perfect time to think about career advancement. Are you looking for a new position in the fundraising world? Or interested in discussing skill sets, education, career paths, or resume improvement? Sign up in advance for a private career mentoring session online at frdny.org (click on the "Career Mentoring" tab under Fundraising Day In New York) or email frdny@nycafp.org. Your private session is included with the conference registration fee.

In the Career Mentoring area of the SolutionsCenter, there will be special one-on-one sessions on how to conduct a structured interview. These are geared for those in the position to hire fundraising and development staff. Learn how a structured interview and the specific questions you need to ask will help you find a candidate who will be a good fit with your team. Sign up in advance online at frdny.org (click on the "Career Mentoring" tab under Fundraising Day In New York.)

Fundamentals in Fundraising Certificate

A special curriculum (Essentials of Fundraising) for new fundraisers is a valuable tool for a solid understanding of our profession. Attendees of this track receive a Certificate in Fundraising if they attend all four sessions.

Certified Fund Raising Executive (CFRE)

Fundraising Day in New York is an accredited program for certification and recertification as a CFRE.

Be Sure to See This Year's Best Performing Direct Mail Packaging

FRDNY is proud to present the Direct Marketing Fundraisers Association (DMFA) Package of the Year winners, selected at their annual luncheon on Wednesday, June 5. Visit dmfa.org/events to register or submit your best-performing direct mail package. DMFA will display the award-winning packages during FRDNY in the *SolutionsCenter* on the 5th floor.

FUNDRAISING DAY IN NEW YORK 2014



FRDNY: Insight, Experience, Solutions

Every member of your development team, even board members, needs the invaluable insight of others in the field. New ideas. New perspectives. New sources. New solutions.

Fundraising Day in New York, the largest one-day fundraising event in the nation, is in your own backyard. It brings together nearly 2,000 professionals to share ideas, learn from each other, and discuss the challenges we are facing.

Spend one day away from the office to rejuvenate your skills and knowledge base. Return with new ways to enliven your fundraising, celebrate and enhance excellence within your organization and improve your bottom line.

From 7:30 am to 5:00 pm, join close to 2,000 of your colleagues for more than 50 different educational sessions, with 10 offerings at any one time; networking opportunities; more than 100 suppliers and vendors in our *SolutionsCenter*; and lunch with keynote speaker. All included in the registration price!

FRDNY 2014 Schedule at a Glance

7:30 – 8:30	Breakfast Meetings
7:30 – 8:45	<i>SolutionsCenter</i> Open – Network!
8:45 – 10:00	First Session of Programs
10:00 – 10:45	Break and Networking in the <i>SolutionsCenter</i>
10:45 – Noon	Second Session of Programs
Noon – 12:30	Networking in <i>SolutionsCenter</i>
12:30 – 1:45	Luncheon with Keynote Speaker
2:00 – 3:15	Third Session of Programs
3:15 – 4:00	Break and Networking in the <i>SolutionsCenter</i>
4:00 – 5:00	Fourth Session of Programs

The *SolutionsCenter* is open from 7:30 am until 4:00 pm.
The *SolutionsCenter* is closed during the luncheon.

Interested in Exhibiting?

Email Monica Williams at FRDNYmonica@gmail.com
or call 516.333.0681

Interested in Sponsoring FRDNY 2014?

Contact Emily Brochstein at ebrochstein@kellencompany.com
or call 212.297.2180.

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Registration Fees (reflects per person rates)

AFP membership is defined by individual, not by company.

	Through April 18	April 19 – May 31	June 1 – June 26
AFP Member <small>(membership status will be verified)</small>	\$365	\$395	\$460
AFP Young Professional Member <small>(membership status will be verified)</small>	\$315	\$315	\$315
Non-Member	\$460	\$460	\$460
Group of 4 or more from the same organization	\$365	\$395	\$460

Your registration fee will be the rate in effect when payment is received. If you experience difficulty, please call 516.333.0681.

Fundraising Day in New York
2667 Hyacinth Street
Westbury, NY 11590
Tel: 516.333.0681
Fax: 516.333.0689
frdny@nycafp.org

If you are interested in the following, visit www.frdny.org to:

- Register for Career Counseling/Resume Review
- Sign up to be a Career Counselor
- Print out the Maurice Gurin Scholarship Application
- Real Time Grant application

Hotel Rooms at the Marriott Marquis

1535 Broadway,
New York, NY 10036

A special room rate of \$299 plus applicable taxes is available at the Marriott Marquis. Call 800.266.9432 or 212.398.1900 and mention Fundraising Day in NY. This reduced

rate is valid through 6/6/14 or while rooms are still available.

New York Marriott Marquis, Broadway at 45th Street, New York, NY. Access into the hotel for those with disabilities is at the 45th Street entrance, just west of Broadway. If you have any special needs, please call 516.333.0681.

For your records

FRDNY's Tax ID# is 13-2998061

All cancellation requests must be received in writing by mail or email

Written cancellations received by 6/1/14 will be charged a \$50 cancellation fee. All cancellations received after 6/1/14 will NOT be refunded.

FUNDRAISING DAY IN NEW YORK 2014

Association of Fundraising Professionals | New York City Chapter
2667 Hyacinth Street | Westbury, NY 11590

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