26th Annual Virginia Fund Raising Institute

Tuesday, July 17

5:30 PM Registration for Opening Reception/Conference

6:00 PM Opening Reception: **IMPROV Your Networking** (Optional add-on to registration, program from 6:30 to 7:15)

James Wasilewski with HAHA to AHA will lead participants in interactive activities allowing them to network and share information with each other in a fun environment. The program will introduce, energize and prepare participants for the first day of the conference in a light-hearted atmosphere.

7:30 PM Reception Concludes, Dinner on Own

Wednesday, July 18
7:30 AM Registration/Exhibits Open

8:30 AM Opening Keynote Presentation: **Storytelling for Fundraisers,** Tom Ahern

Let us tell you a story…join Tom Ahern, whom the New York Times called "one of the country's most sought-after creators of fundraising messages," for a look at what kinds of stories fundraisers need to tell ... as well as listen for: the "long story" (how committed is the donor?), the "short story" (how do we engage someone in a matter of seconds?), the "wrong story" (are you telling the half of the story that donors actually care about?), the so-called Tangible storytelling formula (it raised billions in the UK), and more. Learn how, used skillfully, the power of storytelling can have transformative results.

11:15 AM Lunch

12:30 PM Workshop Session I
Senior Leader's Workshop, Tom Ahern

Connect with your seasoned colleagues and Tom Ahern for a facilitated discussion focused on two topics: bequest marketing, and why shoving it under "planned giving" is a marketing mistake; and metrics such as Lifetime Value, ROI, "value" metrics vs. "vanity" metrics (the stuff Roger Craver, one of the world's most experienced fundraisers, obsesses over). Together we'll discuss, share and problem solve. This session is open to senior and executive level practitioners including Executive Directors with 10+ years of experience.

"Neat to Know" vs "Need to Know": Partnering with Your Prospect Research Department to Leverage Results, Katrina Klaproth, Principal, Bentz Whaley Flessner, and Martin O'Donoghue, Director of Prospect Research and Prospect Management, James Madison University

All "data" is potentially useful, but all data entails some cost to acquire, interpret and integrate. Now more than ever, fundraising and prospect research must partner to analyze and determine what is worthwhile in today's overwhelming sea of data. This track will inform the design of an intentional data acquisition strategy, including respective roles and priorities in data gathering to inform decision making and strategies, while minimizing collection for collection's sake. Presentation looks at the current fundraising environment and demonstrates how prospect research and development can leverage technology and mobile techniques to improve efficiency, simplicity and understanding in the lives of development officers, their managers and prospect management now and in the near future.

An EPIC Approach to Community Partnerships, Emily H. Toalson, Director of Development, VCU School of Business, and Sandy Turnage, Ed.D., Director of Development, VCU School of Business

At VCU Business, fundraising priorities are in alignment with the EPIC strategic plan, which illustrates our strengths as well as opportunities for community partners to invest. We will share best practices and host a community partner to speak and share their firsthand experiences. We encourage an interactive forum among participants to generate discussion, ideas, and practical strategies that can be applied across organizations.

Strategic Planning-"Light", Amy Nisenson, Consultant, Amy Nisenson and Associates, LLC, and Karen LaForge, Executive Director, The Read Center

Small organizations cannot always take the time, don't have the funding or the board/staff capacity to do a full-blown strategic planning process. Perhaps it makes sense to use a different process: one that doesn't involve outside stakeholder interviews, a strategic planning committee, and other pieces of a text book process. Amy Nisenson, Consultant and Karen LaForge, ED of the Read Center will outline this strategic planning process and the outcomes that were achieved.

World Café Session, Peer-to-Peer Fundraising

Based on the understanding that conversation is the core process that drives personal, business, and organizational life, the World Café is more than a roundtable – it's a creative process for leading collaborative dialogue, sharing knowledge and creating possibilities for action in groups. A World Café is a conversational process for knowledge sharing in which groups of people discuss a topic at several tables, with individuals switching tables periodically, getting introduced to the previous discussion at their new table by a "table host", and sharing the discussion from their previous table. Then the conversation continues, deepening as the rounds progress.

2:00 PM Break and Check In

2:20 PM Workshop Session II

Fundraising, Advocacy and Authenticity: Exploring the Changing Role of the Development Officer, Amanda Kennedy, Chief Advancement Officer, St. Andrew's School, and David E. LeFebvre, Director of Development, Boys & Girls Club of Metro Richmond

Development officers are well positioned to advocate for and represent a variety of different non-profit organizations and mission-drive causes. As social-impact leaders, the development officer, has a multitude of opportunities to affect positive social change and, in fact, has a responsibility to help foster an equity-focused culture that ensures all stakeholders, within and beyond the walls of any particular agency, are able to contribute to the mission. Aligning with a "Culture of Philanthropy," this session will explore the changing role of a development officer – from traditional job duties (direct mail, prospect research, major gifts, volunteer management, etc.) of your organization to being an authentic advocate for your mission. The session will also consider a range of advocacy positions – from championing an-equity focused culture to ensuring that your organization has systems that are trauma-informed.

Appreciative Inquiry & Fundraising: Disruption, Vision, and Creation, Oh MY! Jessica Cocciolone, MBA, CFRE, Director of Development, Elk Hill, and Alan Hutson, Jr., MPA, CFRE, Managing Partner and Senior Consultant, The Monument Group

Disruption is the new mode of operation in modern American. Nonprofits and philanthropy are not immune to it. For non-profits to continue to be sustainable, they need have conversations that expand possibilities, question limits, and give new ideas room to grow. Partners want real engagement and organizations need partners who have a shared vision. This will require courage, and the kind of investment and support that can enable productive risk-taking. Non- profits need new tools and new relationships with donors, communities and partners. This workshop introduces Appreciative Inquiry as an approach to engage the whole system in dialogue and co-creating the future.

Social Media Best Practices: Building Support on Social Media, Dave Martin, Chief Marketing Officer, Children's Home Society of Virginia, and Jordan Pye, Content Marketing Specialist, Torx Media

We have assembled a panel of regional non-profit digital marketers to educate and provide practical guidance about: 1) the power and limits of different social media platforms, 2) realistic expectations about what social media can achieve, and 3) determining the right social media tools and the best strategies based on your needs and goals. Our experienced panelists from VCU Massey Cancer Center, Better Housing Coalition, Maymont Foundation, Children's Home Society of Virginia and Torx Media will share real-life examples of social media success for their non-profit organizations and clients.

How to Earn Your CFRE, Shannon L. Watts, CFRE, President, Key Fundraising, Inc.

Have you thought about applying for your Certified Fund Raising Executive (CFRE) Designation, but just didn't know where to start, what it takes, or how much it costs? Is it worth it to you and your career? During this session, Shannon will review the steps to earning your CFRE, with a detailed review of the application and exam preparation tips, as well as discuss the benefits of being a CFRE.

Getting Your Organization Campaign Ready for a Successful Major Fundraising Initiative, Christina Yoon, Vice President, Campbell & Company

"Campaign" is an intimidating term for many development professionals—bringing to mind an aspirational and unique fundraising initiative. In reality, campaigns are simply a way to organize your day-to-day development responsibilities around a grand vision and a specific timeline.

World Café Session, Diversity Issues

3:20 PM Break and Check In

3:40 PM Workshop Session III

Making the Successful Major Gift Ask, Wendy McGrady, Executive Vice President, The Curtis Group

The Curtis Group, a Virginia-based consulting firm, has been advising nonprofits and promoting philanthropy for over 29 years. Nonprofit organizations have a greater need than ever to fundraise and many realize that a successful major gifts program is critical to their success. This workshop will show seasoned development professionals how they can develop a program that moves donors and volunteers to the "Big Ask." During the workshop participants will learn the importance of building relationships, the steps for an effective major gift solicitation and the role of the board in major gift calls. A panel of seasoned major gift professionals will also provide "on the job" examples and insight to the conversation. At the conclusion of the presentation we will conduct a role playing session and offer time for Q&A.

Planned Giving Basics for New and Growing Programs: Tested Solutions When That's Not All You Do, J. Bradley Purcell, JD, Owner, Planned Giving Advantage, Inc., and Kelly del Campo Merricks, CFRE, MBA, Vice President of Philanthropy, Sheltering Arms Foundation

Instead of an exhaustive approach, this 90-minute workshop focuses on the major problems/challenges that every new or growing gift planning program will face. A group of experienced colleagues will provide tested solutions to practical problems, and ways to exploit common opportunities, reflecting their years of experience in gift planning. Topics covered include 1) identifying key prospects, both singly and in groups, 2) organizing your marketing into your existing operations, 3) the "planned giving conversation," and 4) unique issues concerning gift policies and benchmarking results. Stories of donor interaction and illustration of professional challenges met and mastered will provide openings for audience questions and input.

Whining and Moaning and Groaning...Engaging Your Board and Volunteers in Fundraising, Jane Stein, President, JPS Consulting

We all have read many, many articles on getting our Board and volunteers to ask for money. We all have attended many, many sessions on getting our Board and volunteers to ask for money. And for the most part, we all have failed miserably when we put all of our wonderful knowledge and skills to the task of getting our Board and volunteers to ask for money. This session has been designed to help us all to take a step back, regain our senses of humor, and then step forward again with a few new ideas and finally getting our Board and volunteers to go out with us and FUNDRAISE.

Designing & Leading Mid- & Major Giving Programs, Susan K. Johnson O'Neil. Principal, Points Ahead, and Rhonda Sherman, Vice President, Philanthropy, Operation Blessings International

Inspiring current donors to increase their commitment to your organization is the most effective pathway to increased revenue and high ROI. Retaining donors and increasing their giving takes strategies, structures, and processes that puts the ideas of a "culture of philanthropy" into action. In this session, we will examine an organizational model and structures that fundraising leaders and managers can use to: Keep Donors Top of Mind: Focusing on effective stewardship and donor-led solicitation; Engage Leadership: Developing a donor-centric mindset in chief officers and board leaders; and Develop Staff Best-Practices: Creating a staff management program that promotes donor-centric practices as well as performance results.

Time, Interest and Impact: Content Marketing for #ShortAttentionSpans, Will Schermerhorn, Content Marketing Consultant and Photographer, AtomStream Communication

People have short attention spans these days. Every sentence, every word, and every second matters. This workshop gets to the core of communication and impact online. Learn a framework for showing impact through text and photos. Tune reading levels to boost engagement. Grab your online audience in the first seconds—or tell them goodbye.

World Café Session, Telling Your Nonprofit's Story

5:10 PM **Vendor Reception & Exhibits**

6:00 PM Reception Concludes, Dinner on Own

Thursday, July 19

7:30 AM Registration and Exhibits Open - Buffet Breakfast

8:15 AM Day 2 Opening Keynote: **Fifty Shades Grayer** – From Dating Donors to Building Lasting Relationships, D. Todd Gray, Vice President of Financial Development, YMCA of the USA

> This sequel to Todd's popular presentation at VFRI in 2017, "Fifty Shades of Gray – A Development Officer's Guide to Dating Donors," will expand upon his humorous approach to dating, engagement, and marriage as a metaphor for donor-centered moves management. Todd will share his own experience of meeting donors, getting to know their interests, sharing an organization-related journey with them and building lasting relationships. Whether it's the first date or your 10th anniversary, his message will allow you to revitalize your donor relationships by applying rapport-building tools for everyone – staff and volunteers!

9:35 AM Workshop Session IV

Data Driven Strategies for Annual Giving, F. Nicholas Sollog, III, Founder & CEO, The Sollog Group, LLC

> With higher expectations from leadership and shrinking budgets we need to get creative with how we solicit our Annual Fund donors to find ways that inspire repeat and increased gifts. This session will look at data driven methods to help attendees fine-tune their segmentation strategies to be more effective and efficient. Through a mixture of lecture and hands-on participation attendees will learn to use their own data to determine who is more likely to make a gift and how to create more donor centric solicitation strategies. Whether you are unsure of what lies in your data or you live inside of your data day in and day out you will leave this session with tools that can be repeated year after year.

Secrets of the 2nd Gift – the Key to Donor Retention, Jay B. Love, CRO and Co-Founder, Bloomerang

> Fundraisers spend a lot of time acquiring new donors, and with good cause. However, in order to create a long-lasting relationship, the most critical gift isn't the first;
> it's the second. In this session, nonprofit technology veteran Jay Love will make the case for why donors should concentrate on acquiring a donor's second gift in order to achieve sustainable funding, high donor retention rates and high donor lifetime values. You'll see examples that can be implemented by any organization, whether you are a one-person shop or a large development department. The results can be astounding when put into daily use!

Leading by Design: Advancing Nonprofit Impact (& Fundraising!) via Board Diversity, Jeanne Allen, Master Trainer & Consultant, Jeanne Allen Consulting

> We'll unpack the latest report from BoardSource, highlighting effective board practices in creating and maintaining diverse boards , the relationship of diverse boards and fundraising, and where nonprofits are both making progress and being stuck. This

highly interactive workshop will have you exploring new, and rethinking old, ideas, based on the research, anticipating the "elephant in the room" questions, and identifying action steps to lead your board onward.

From Good to Best: Coaching your Staff to Excellence, David M. Huffine, CFRE, VP for Advancement, St. Joseph's Villa

As the leader of a team, you want to bring out the best in each individual and create a workplace where people bring their best daily. When your team is made up of people with an array of personalities, motivators, work experience and education, how do you coach them to be their best? As importantly, how do you, as a manager, create and support a high-performing team? Using the workplace personality profiles as a backbone, this session will help established and aspiring leaders understand how to coach their teams to excellence.

Young Professional Groups: Harnessing the Next Generation's Philanthropic Energy, Michelle Adcock, Director of Board Relations, VCU Massey Cancer Center

Young professional boards and affinity groups, whether well-established or just starting, are a key component to many development plans. Join Michelle Adcock, Director of Board Relations at VCU Massey Cancer Center, and Abbey Withrow, President of the Massey Alliance, to hear about the Massey Alliance's fundraising and advocacy efforts. This presentation will explore ways to engage this relevant and dynamic group of volunteers and donors, identify goals and expectations in YP efforts and share lessons learned - both the good and the bad.

10:35 AM Break with Vendors/Check out

10:55 AM Workshop Session V

Training Your CEO to Fundraise – How to Develop a Highly Successful Partnership, Virginia Thumm, President, Virginia Fundraising Consultants

A strong, trust-based relationship between the CEO and the organization's chief fundraiser is vital in the overall success of any fundraising effort. In fact, poor relationships with the CEO are one of the chief reasons development professionals cite for leaving and play a substantial role in development office turnover. Whether you are a CEO, CDO, DOD or Major Gift Officer, this presentation will offer some easy tools to employ to create a collaborative and productive partnership between the corner office and the development office.

Donor Acquisition Strategies from a Small Shop, Sara Bodorf Higgins, Shalom Farms

When there aren't enough resources to do it all, how can small shops effectively acquire new donors? In this 60-minute session you will learn the importance of new donor acquisition, how to evaluate your organization's current donor acquisition efforts, and strategies that can be implemented to better identify, engage, and solicit potential new donors!

Donor Lives, Donor Stories: The Powerful Role of Legacy Letters in Planned Giving, Sophie W. Penney, Ph.D., Senior Program Coordinator, Penn State University, and President, i5 Fundraising

In this interactive session attendees will gain an understanding of the legacy letter writing process. Through structured exercises participants will begin to gain a sense of how writing a legacy letter can enable a person to reflect and record the values that they hold dear. Through discussion and presentation the group will then focus on how this process might be used to enhance discussions about planned giving.

Successful Campaigns: Raising Million-Dollar Gifts, Karin Cox, Senior Executive Vice President and Chief Creative Officer, Hartsook, and John Warren, Executive Vice President, Hartsook

Many nonprofits see themselves as too small or not organized enough to raise major gifts at the million-dollar level, but this session will help take the mystery out of raising million-dollar gifts. With the right strategies, almost any nonprofit can raise major gifts, including gifts of a million dollars or more. Whether you are a new nonprofit looking for first-time donors or a longstanding organization wanting to move to the next level of fundraising, this session will challenge your assumptions and help you start using proven fundraising strategies to attract million-dollar gifts.

Debunking the Myths of Corporate and Foundation Funding, Victor Branch, Richmond Market President, Bank of America, and Amy Nisenson, Executive Director, Mary Moton Parsons Foundation, Consultant, Amy Nisenson and Associates, LLC

Does your organization regularly look for funding from corporations and foundations to support programs and activities? Do you have all of the necessary documents and information in place before you begin filling out grant applications, both on-line and written? At this session, you will learn some best practices for approaching corporations and foundations. Hear from two seasoned philanthropy professionals—Victor Branch and Amy Nisenson – who will provide practical advice, discuss who to approach and when to approach them, and share some examples of fundable and non-fundable proposals.

11:55 AM **Lunch and Closing Panel Presentation: Key Trends in Philanthropy** (session runs 12:30 – 2:30)

With leading voices in our sector, this panel will discuss key trends in philanthropy based on the latest data and well established best practices. From board engagement and key trends to how and why American's give, this powerful closing session is not to be missed! The discussion will feature the following national voices:

- **Moderator: Stacy Palmer, Editor*, The Chronicle of Philanthropy***

  Stacy Palmer has served as a top editor since the Chronicle of Philanthropy was founded in 1988 and has overseen the development of its website, Philanthropy.com. She plays a hands-on role in many Chronicle services, such as its Philanthropy Today daily newsletter and its webinar series offering professional development for people involved in fundraising, grant seeking, advocacy, marketing and social media. Palmer has appeared frequently on radio and television to offer commentary on news in the nonprofit world. She is the editor of Challenges for Philanthropy and Nonprofits, a book published by the University Press of New England that collects three decades of observations by the nonprofit activist and Chronicle columnist Pablo Eisenberg. Before she helped found the Chronicle of Philanthropy, Palmer was editor for government and politics at the Chronicle of Higher Education.

- **Sixto Cancel, CEO, Think of Us**

  Sixto Cancel is the founder and CEO of Think of Us, a non-profit dedicated to leveraging technology to improve the life outcomes of foster youth aging out of the system. Sixto was selected as Forbes "Top 30 Under 30 Social Entrepreneurs" in 2017. Sixto has also been recognized by the White House as a "White House Champion of Change", a "Millennial Maker" by BET, and was named as one of the "Top 24 Changemakers in Government under 24" in the country by the Campaign for a Presidential Youth Council and Sparkaction. In the spring of 2016, Sixto and his team co-organized and executed the first White House Foster Care and Technology Hackathon. Sixto has served as a Young Fellow at Jim Casey Youth Opportunities Initiative since 2010, where he has worked on youth engagement, asset development, and permanency.

- **Keith Curtis, President, The Curtis Group**

  Keith has over 30 years of experience working on behalf of philanthropic organizations across Virginia and the mid-Atlantic, gaining recognition as an expert in all aspects of fundraising and nonprofit management. He is a sought-after advisor and speaker, making up to 40 presentations a year to the nonprofit industry. Keith is the immediate past chair of the Giving USA Foundation and is the past chair of the Advisory Council on Methodology. He is also a board member of the Giving Institute and past president of the Hampton Roads Gift Planning Council. He was honored with the 2012 Alumni Service Award from Old Dominion University.
- **Erin Hogan, Managing Director, Philanthropic Market Executive, U.S. Trust, Bank of America Private Wealth Management**

  With more than 15 years' experience in the philanthropic and nonprofit sector, Erin Hogan oversees the regional philanthropic practice for U.S. Trust® clients across 12 states and the District of Columbia, working closely with philanthropic individuals and families and nonprofit institutions on all aspects of giving. Prior to joining U.S. Trust, she served as an executive director of the Philanthropy Centre at J.P. Morgan Private Bank, where she advised individuals, families and institutions on matters of mission, governance, impact and legacy. Erin also has overseen grantmaking programs on behalf of private foundations in the areas of education, health and community development, and works closely with public charities on strategies to strengthen organizational capacity, leverage philanthropic partners and maximize impact. Erin's previous experience includes academic research and government consulting for a variety of public health and safety programs. She currently serves on the National Advisory Board of the Smithsonian Institution's Science Education Center, as well as a member of the board of directors for Frameworks Institute, a national organization dedicated to improving communication and understanding of complex social issues.
- **Matt Nash**

  Matt recently retired from Fidelity Charitable, an independent public charity and one of the largest grant-makers in the US. As the Senior VP of Marketing and Donor Experience, Matt has spent several years studying donor behavior and working with them to make giving accessible, simple and effective. Prior to Fidelity Charitable, Matt has spent more than 3 decades leading client and customer focused organizations creating trusted relationships and satisfying experiences for individuals and institutions. Matt's philanthropic and volunteer work has focused on supporting local public education including heading school bond infrastructure campaigns and fundraising projects to empower teachers. Matt received a Bachelor of Mechanical Engineering and an MBA from the University of Minnesota.

2:30 PM   Closing Comments - Announcement of VFRI 2019