

9:00-10:30am Ballroom

Roger Craver - KEYNOTE

The Foundations of a Solid Fundraising Strategy

Why do some organizations continue to grow while others plateau or wither away? The reason lies in the choices they make—or fail to make—when it comes to learning, innovation and risk.

Roger Craver will challenge participants to think differently, by introducing new and different methods and metrics to enable you to position your organization for sustained growth. Roger reveals why an organization's "learning culture" is so important when it comes to triggering innovation as an essential driver of growth.

You will be able to Identify whether your organization meets the learning culture/innovation test. And if not, uncover what can be done to fix it. Metrics and methods to be explored over morning coffee include:

- Key Performance Indicators
- Key Donor Metrics
- Donor Feedback
- Donor Service Case Studies
- Free Donor Feedback and Donor Service Feedback Tool for all participants
- Behavioral Science Applications to Fundraising.

Roger promises that attendees with open minds and a willingness to challenge the status quo can climb their organizations out of the valley and foothills upward toward the mountaintop of growth and success.

10:45-11:45am Barnstable I Room

Youth Session: Philanthropic Visions Coming to Reality

This session will talk about the process of clarifying a vision, shaping that vision and bringing it to fruition. The panel will engage the students in a discussion that provides best practice examples for fundraising concepts that are transferable to support your local cause or philanthropic enterprise. A broader exchange will consider social responsibility and how to transform the "giving" of time, expertise, and fundraising into making a difference in the community.

Tom Brognano, Camp Director and Healthy Living Coordinator, YMCA Cape Cod
Katrina Fryklund, Director of National Outreach, Latham Centers on Cape Cod
Meghan Kemp, Grants & Development Coordinator, Cape Cod Children's Place

10:45-11:45am Bass River Room

Top 10 Characteristics of a Successful Fundraising Board

This “success session” explores one of the toughest nuts to crack: how an organization can most effectively and efficiently engage its board to maximize fundraising efforts and achieve mission-aligned goals. Joy Hunter Chaillou helps to identify the *Top 10 Characteristics of a Successful Fundraising Board* with more time to discuss these key topics:

- The importance of goal setting and a clear plan of action
- Identification of roles and accountability
- Collaboration to achieve best outcomes
- Tools for measuring organizational success relative to goals.

Joy Hunter Chaillou, Managing Director-National Practice Executive for Bank of America Merrill Lynch and US Trust

10:45-11:45am Centerville Room

Business Facebook—Strategies for Exploiting the Platform to Your Nonprofit’s Benefit

Do you understand your Facebook Business Page, or are you using it the same way you use your personal page? Explore this less-widely used Facebook option and how the Facebook algorithm works. Discover posting strategies and insights for success and then advance to integration with Instagram—a Facebook-owned product. Finish with utilizing Facebook Boosts and Advertising to get your mission and message better understood and recognized.

Tricia White, Social Media Instructor, Cape Cod Community College’s Center for Corporate and Professional Education

10:45-11:45am Hyannisport Room

When Your Work Is Valued, Your Worth Increases, but How?

How do you demonstrate your relevance and your leadership abilities on the job while remaining engaged with the other aspects of your life? Hear how individuals in leadership positions in the non-profit world demonstrated their abilities day in and day out, stretching their comfort zones while staying involved with all that is important in their lives. End this session knowing how to demonstrate your leadership abilities in your current position and set yourself on a path to growth.

Maggie French, Principal, Living Whole Coaching
Kim Corben, Executive Director, Plymouth Philharmonic Orchestra
Alisa Galazzi, CEO, Housing Assistance Corporation
Kristin O’Malley, President & CEO, The Cape Cod Foundation

10:45-11:45am Orleans Room

Engaging Donors Even in the Off-Season

This workshop examines the challenges of fundraising in a seasonal community. Each year Cape and Islanders experience a strong influx of summer residents and visitors, many of whom become supporters of local nonprofits. But when the summer ends, those supporters seemingly disappear, leaving a gap in the continuity of fundraising. Don't lie down—there are strategies for moving forward with this seasonal population *and* your year-round donor base. Participants will be encouraged to share their ideas and tips for the benefit of all in attendance.

Margaretta Andrews, Executive Director, Community Foundation for Nantucket and George Donnelly, Director of Development, Mariah Mitchell Foundation

1:45-2:45pm Bass River Room

Donor Retention and Commitment Made Easy

There's hidden gold in your donor base just waiting to be mined. Attend this session for a map to that treasure! Roger Craver, author of the classic *Retention Fundraising: The New Art and Science of Keeping Your Donors for Life*, will cover:

- The 8 reasons why donors quit
- 7 actions organizations take to determine donor retention rates
- Identification of retention barriers that exist in most organizations.
- Calculating donor “Commitment Scores”—the most accurate predictor of whether a donor will stay or lapse.

Leave this session with “Five Easy and Inexpensive Retention Wins” - actions and recommendations that can be put to work right away.

Roger Craver, Consultant

1:45-2:45pm Centerville Room

Starting the Gift Planning Discussion: Breaking the Ice with Your Prospects and Donors

Planned Gifts provide vital funds for our organizations, but how do you raise the topic in your regular donor conversations? This enlightening, educational (and often humorous) session will walk you through the steps for leading these delicate conversations. Real-life case studies will help you to overcome common fears, debunk myths, and identify conversational cues that indicate your donor is a great gift planning prospect!

Christine Walsh, Director of Gift Planning, Brigham and Women's Hospital

1:45-2:45pm Hyannisport Room

The Good, The Bad, The Ugly: The Truth Behind the Work and Responsibilities of Non-Profit Board Work

This session on participation in board of director's work at non-profits will be a no-holds barred look at the commitment, engagement, responsibilities and accountabilities of board membership. While volunteering for a board on a non-profit can bring many rewards and sense of doing good in the community it is also a responsibility that cannot be taken lightly. Board membership can require hard decision-making and ownership of the fiduciary responsibility that the Commonwealth's Attorney General's office requires of board members. Knowing the weight of Board involvement should be understood from the start; empowered with this knowledge an individual will grow their leadership skills as well as be part of the responsible management and growth of a non-profit. Guest speakers at this presentation will include a representative from the Mass Attorney General office, local board members and CEO's of local non-profits.

1:45-2:45pm Orleans Room

The Pan-Mass Challenge (PMC): Improve your event results through these lessons from the giant.

The Pan-Mass Challenge bike-a-thon raises more money for charity than any other athletic fundraising event in the country. David Hellman's work behind the scenes has revolutionized the way riders, sponsors, and volunteers experience the PMC. Mr. Hellman will show how utilizing the web, and data from all facets and angles, literally drives the PMC's success and efficiency with technology. You will walk away with key strategies and applications to improve your results, no matter the size of your organization or event.

David Hellman, PMC Senior Vice President

3:00-4:00pm Hyannisport Room

The Role of the CEO or Executive Director in Major Gifts and Personal Solicitations

Major gift donors and prospects will only give if they have confidence in and a relationship with an organization's leadership. It is imperative that CEOs or Executive Directors meet with their donors and understand their philanthropic interests and goals prior to asking them for a gift. Success is more likely when leadership can communicate the organization's vision, articulate the strategic plan and top funding priorities, and explain the impact of a major gift. This session, led by four high-profile Cape Cod nonprofit executives, is sure to provide invaluable insights, strategies and tactics for any leader to take back home, regardless of the size of your organization.

Jay Coburn, Executive Director, Community Development Partnership

Fiona Jensen, Founder and Executive Director, Calmer Choice

Christine Menard, Executive Director, The Family Pantry of Cape Cod

John Pappalardo, Chief Executive Officer, Cape Cod Fishermen's Alliance

3:00-4:00pm Centerville Room

Defining the Donor: Using Your Data to Build Better Constituent Relationships

Categorizing your constituents is key for any successful development campaign. Building better relationships with your constituents only happens when you can best define your donors with the data you hold on them. But where to start? Attend this session to learn effective, proactive approaches to data management, including donor mapping and segmentation. And knowing how to answer common questions like: Where did your constituents come from? What is their major demographic? What is their giving history? and How will you communicate with them moving forward?

Christa Danilowicz, Philanthropic Officer, Cape Cod Commercial Fishermen's Alliance
Nancy V. Vinje, Consultant, Nonprofit Management Systems, Inc.

3:00-4:00pm Orleans Room

Keeping the Devil Out of the Details of Your Organization's Financial Information

Is your organization compliant with Nonprofit Accounting Standards? Does your organization focus primarily on its mission and not closely enough on finances? What resources and staff do you have available to ensure accurate reporting? What benefits can be gained by sound financial policies? What Board member/s and volunteers do you have to assist to fill in the gaps?

Without accurate financial information and goals, your organization jeopardizes its nonprofit tax-exempt status and can experience serious significant losses in revenue. Attend and uncover pitfalls and opportunities to improve your financial health with sound best practices and advice from an industry expert.

Marifran McKindsey, CPA, McKindsey Consulting Services

3:00-4:00pm Bass River Room

Topical Networking Roundtable Sessions

Worthwhile Reads

Keeping up with every quality piece of content published by and for fundraisers on the web every day would be a full-time job in and of itself. There's absolutely no way you could read it all. While there are many very well-known speakers and writers who boast tens of thousands of daily readers and followers, this roundtable highlights some lesser-known hidden gems – as well as some long-established publishers – that may change the way you think about and perform your job.

Sarah Tribuzio, Managing Director of Development, WCAI.

Navigating Networking Events

Whether you are new to networking or an old pro ready to share your secrets and learn some new tricks, join this interactive discussion to share your anxieties, lessons learned, and successes with networking events. You are guaranteed to walk away with some new tips on how to make your next networking event more effective, strategic and worthwhile.

Jennifer Cummings, Associate Director of Development, Cape Cod Healthcare Foundation

Revelations and Rapid-Fire Coaching for Nonprofit Leaders

It's lonely at the top. Leadership positions can make you feel isolated, consume your personal life, and present challenges that you are ill-equipped to handle. But you are not alone! This fast-paced session presented by Senior Fellows of the Institute for Nonprofit Practice (INP) Cape and Islands class will unveil "revelations" from the intensive six-month INP leadership course and offer rapid-fire coaching. Bring your burning questions: boards, accountability, committees, fundraising – it's all on the table.

Richard Brothers, Independent Consultant and James Lehane, Independent Consultant

Donor Recognition Events

Love them or hate them: events play a major role in the Cape and islands' nonprofit world. From events that drive revenue to prospecting, cultivation and recognition events, this round table conversation will touch upon both successes and failures, and encourage frank discussions about how events meaningfully contribute to an overall fundraising strategy.

Beth Howard, Director of Development, Heritage Museums and Gardens