



ignite your passion · inspire your game

PHILANTHROPY
Day
2015



Tuesday, November 10, 2015
Hyannis Resort & Conference Center • 8am-6pm

Featured Plenary Speaker: Nancy Frates
The mom who started the ALS Ice Bucket Challenge and her inspiring story!

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Philanthropy Day on Cape Cod

PREMIER UNDERWRITER The Edward Bangs Kelley & Elza Kelley Foundation, Inc.

Philanthropy Day on Cape Cod

ignite your passion • inspire your game



8:00 am

Registration & Continental Breakfast – Meet the Exhibitors



8:30
to
10:00 am

Plenary Session

Every August until a cure - A family's journey of love, inspiration and a historic, global movement!

When Nancy Frates' son was diagnosed with ALS in 2012, she was confused. Pete was a 27-year-old athlete and the only people she'd ever known with this disease were elderly already. Ever since that life-changing moment, she and her family have found their sense of purpose in working tirelessly to raise awareness about ALS and to stimulate funding for research.

Pete Frates inspired the ALS Ice Bucket Challenge, which quickly became a viral fundraising phenomenon. In all, The ALS Association projects that the challenge will have raised over \$160 million for research.



Nancy Frates

10:00 am

Break – Meet the Exhibitors



10:30
to
11:45 am

Philanthropic Prospecting on Steroids

The best prospect programs help you to target new prospects and uncover your best new constituents. But can everyone afford it? And who has the time? Discover both free and fee-based applications that help you target individuals by income, worth, age, giving capacity, giving history, and so much more. You will be surprised (and delighted) to know that the information is out there for you to isolate and explore with the proper tools and methodology in hand.

Dave Chase, Founder and CEO, Chase Solutions, Inc.

PREMIER UNDERWRITER

PLENARY UNDERWRITER

COMMUNITY UNDERWRITER



Youth Session

10:30
to
11:45 am

What's on YOUR Bucket List?

This session will build upon the amazing success story of the morning plenary session and provide attendees with best practice examples, insights into engaging event planning, marketing skills and fundraising concepts that are transferable to support local causes or philanthropic enterprise. Attendees are encouraged to bring examples of fundraising initiatives that can be fine-tuned to provide greater focus, clarity and impact for your own initiatives!

Panel Moderator: *Diane E. Salomone, U.S. Trust*

Katrina Fryklund, Director of Development, Latham Centers

Meghan Kemp, Grant and Development Coordinator, Cape Cod Children's Place

Dara Bryan, Program Officer, Cape Cod Foundation

Kevin Turner, Headmaster, Mashpee Middle High School

How to Make the Most of Your Annual Fund

10:30
to
11:45 am

The Annual Fund is a key component to a nonprofit's fundraising success. But what exactly contributes to a successful annual fund strategy? How do you get started? How do you retain donors? And how can you do so while raising more money? Learn the process and strategies behind planning, executing and maintaining a successful and strong annual fund, and set yourself on a path for further fundraising success.

Andi Genser, Executive Director, WE CAN

Hadley Luddy, Consultant

Holly Brockman-Johnson, Development Coordinator, Children's Cove

Planned Giving – A Sensitive Conversation?

10:30
to
11:45 am

Are you able to talk enthusiastically with your donors about their estate plans? Or, do you avoid the conversation because it's uncomfortable? Are elderly donors off limits at some point; and when should a family member or attorney be present for the conversation? Hear from professionals who speak easily and often about planned giving, and you too will soon be one of them! Go where you have not gone before with confidence and passion, and earn the trust of your donors and their families.

Rev. Angie Menke Ballou, Cotuit Federated Church

Christopher J. Ward, ESQ., LL.M., Partner, Latanzi, Spaulding & Landreth, P.C.

LUNCH UNDERWRITERS

TECHNOLOGY UNDERWRITERS



CAPE COD HEALTHCARE

Expert physicians. Quality hospitals. Superior care.



ROGERS & GRAY
INSURANCE

U.S. TRUST

Bank of America Private Wealth Management



10:30
to
11:45 am

Making Your Organization Heard: Effective Public Speaking and Media Communication

In the cacophony of today's multi-media world, how do you get your organization's feel-good, altruistic message into the conversation? You know you have to do it to raise vital funds, credibility, and visibility, but how? Join us for a conversation on media strategies, public speaking, and best practices that include determining your organization's most viable stories, fitting your organization into trending topics, and how to speak with media (and potential funders) with the focus of a politician and the grace of a saint. Presented by two former journalists turned public relations pros.

Jackie Herskovitz Russell, *President, Teak Media+Communication*

Diana Brown McCloy, *Senior Account Director, Teak Media+Communication*

Noon

Distinguished Service To Philanthropy Awards & Luncheon

2:00
to
3:15 pm

The (Right) Data is King

You've heard the saying "Data is King," but what does that exactly mean? How do we define and understand data metrics to positively affect our fundraising needs? This session offers best practices and advice about what to measure, how to measure it, and why. Utilizing data as your guide, you will leave knowing how to build your strategy around your mission and objectives, regardless of the size of your shop.

Brooks Heckner, *Associate Director, Contributor Development Partnership*

Ingrid McKinney, *Director of Membership Marketing, WGBH*

Tam Bray Atwood, *Director of Data and Analytics, WGBH*

DIRECT MAIL SPONSOR



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2:00
to
3:15 pm

The Business of Stewardship

In today's disruptive and fast-paced world, how do you stay relevant and keep stakeholders engaged for the long term? With change happening at such a rapid rate, flexibility and responsiveness are vital to success. Hear three different perspectives from knowledgeable professionals who steward or are stewarded. The panel will share their real-life stories based on decades of experience in creating and preserving lasting donor relationships.

Wendy Cullinan, Director of Resource Development, Habitat for Humanity of Cape Cod

Rick Penn, President, Puritan of Cape Cod

Tony Shepley, Owner and President, Shepley Wood Products

2:00
to
3:15 pm

Integrating Advocacy into Your Organization

Is your nonprofit ready to tackle advocacy? If the answer is yes, simple advocacy tactics can empower your nonprofit, create greater awareness and enhance the mission of your organization. Most of us already have resources we can direct to give the boost we need. This session will show you how to integrate advocacy into your work by making small shifts in your daily operations. The results can further organize and amplify your current efforts, and inform and influence others along the way.

Mark Forest, Executive Director, The Delahunt Group

Rick Jakious, District Director, Congressman Seth Moulton

Patrick Ramage, Whale Program Director, IFAW

2:00
to
3:15 pm

Writing to Raise More Money

Are your donors hearing from you year after year with the same (and perhaps tired) messaging? Is your communication persuasive and compelling? Does it tell a good story? In this session you'll learn how to grab your readers' attention, spark their renewed interest, and inspire them to give, continue giving, or even start giving again. Persuasion is both art and science. We'll show you the techniques and apply them to craft fresh messages that get results. Bring a pencil... we might even give you an in-class assignment to get those creative juices flowing!

Tracey Palmer, Writer, Editor, Project Manager, Palmer Communications

Maura King Scully, President, MKS Communication

MEDIA SPONSORS



3:15 pm

Break



3:30
to
4:45 pm

Changing of the Guard: How to Effectively Manage Leadership Change for your Organization

It's inevitable. At some point, the Executive Director/CEO/President of your organization announces he/she is leaving. Where do you start? How do you find the "right fit" next leader; create a smooth transition; and help your organization through the change? In this session, panelists will share experiences and lessons learned in the various stages of leadership change including considerations to take into account before embarking on "the big search."

Jim Botsford, Vice President, Cape Cod Five Trust and Asset Management Group

Kevin Ralph, Chief Development Officer and Senior Vice President, Cape Cod Healthcare

Maureen B. Brenner, Head of School, Riverview School

3:30
to
4:45 pm

The Art of Listening: What Are Your Major Donors Really Telling You?

Pack your tool box with skills that will help you on your next major donor visit. This session will focus on individual presentation skills as they relate to fundraising and meeting with donors. Presenter Geri Denterlein has been on both sides of "the ask" and will share both tips and tricks of the trade, including:

- Applying active listening skills to what donors are really telling you
- How to develop your own personal brand to deliver your message with sincerity and confidence
- Reading body language
- Adjusting your messages to your audience
- And real-life examples of solicitations, including the good, the bad and the ugly.

Geri Denterlein, President, Denterlein Communications Firm, and Founding Member of the Red Cross Tiffany Circle

COCKTAIL RECEPTION UNDERWRITERS

3:30
to
4:45 pm

The Power of Humor Using Social Media

Social media is a great way to connect with and inform your constituents utilizing humor. But how does this happen while not diminishing the importance and gravity of our work? Do you meticulously plan your messaging or do you just 'get lucky' and capture a moment? Who do you involve in the social media process at your organization to obtain the right balance and deftly reach your audience through the power of humor? Attend, listen, learn, and exercise your funny bone. No whoopee cushions required!

*Chris Kazarian, Senior Writer, Communications and Development Officer,
Housing Assistance Corporation of Cape Cod*

*Will Rubenstein, Director, Camp Wingate*Kirkland*

4:45
to
6:00 pm

Cocktail Reception & Drawing for a Special Prize

Become a Member of PPCI today!

Join now and immediately take advantage of the reduced membership fee for Philanthropy Day!



Membership Benefits include:

- Quarterly Luncheons featuring guest speakers on topics relevant to members, including non-profit administration, fundraising, social networks, and special events, to name just a few. Free to Members!
- Special Workshops covering topics of interest to new and seasoned development staff, board members and non-profit volunteers. PPCI members receive discounted admission.
- Annual Philanthropy Day Conference — a full day of speakers knowledgeable on a multitude of topics, extended networking opportunities, and a luncheon featuring philanthropic award presentations. PPCI members receive discounted admission to this event.
- Membership includes being associated with other members who share your interest and knowledge of philanthropy, offering networking and collaborating opportunities throughout the area.

One full year of membership with PPCI is \$80

Join Now at CapeCodGiving.org



2014 Award Winners!

Each year at Philanthropy Day, the Philanthropy Partners of the Cape and Islands recognizes four individuals, businesses and/or organizations for the works they have done to support the nonprofit community and philanthropy on Cape Cod, and/or the Islands.

We thank the community for the outstanding nominations and celebrate the 2014 winners!

Outstanding Philanthropist Award:

The Many Anonymous Donors Supporting
Cape Cod Nonprofit Organizations



Outstanding Volunteer Award:
Jill Roethke and Jim Pignato



Outstanding Business Award:
Shepley Wood Products



Outstanding Youth Award:
Kattie Curran



Nominate!



We're excited to bring you a spectacular group of award winners for Philanthropy Day 2015. Please start thinking about who YOU can nominate to be recognized in 2016 for their Distinguished Service to Philanthropy!

- Outstanding Philanthropist
- Outstanding Business/Organization
- Outstanding Volunteer
- Outstanding Youth/Youth Group

Help us spread the word!

Use the hashtag #capecodgiving in your social media posts and pictures!

2015 Philanthropy Day on Cape Cod

Committee Co-Chairs:

Sarah Tribuzo, *WCAI*

Jennifer Cummings, *Cotuit Center for the Arts*

Committee Members:

Trudy Avery, *Caron Foundation*

Karen Bissonnette, *Community Health Center of Cape Cod*

Christina Bologna, *The Cooperative Bank of Cape Cod*

Erich Briggs, *Butcher & Briggs, LLC*

Dara Bryan, *Cape Cod Foundation*

Rachel Burbank, *Cape Cod Commercial Fisherman's Alliance*

Wendy Cullinan, *Habitat for Humanity*

Sue Daggett, *Volunteer*

Gerry Desautels, *HopeHealth*

Bea Gremlich, *Cape Cod Healthcare Foundation*

Ginny Irving, *HopeHealth*

Ann Kanago, *Gloriae Dei Artes*

Geoff Lenk, *Lenk Ladner Investment Solutions*

Lynn Mason-Small, *Rogers & Gray Insurance*

Jean McCutcheon, *Cape Cod Academy*

Pauline Neves, *HopeHealth*

Alecia Orsini, *WCAI*

Chris Perry, *Harwich Chamber of Commerce/Consultant*

Rose Resnik, *Rosemarie Resnik & Associates*

Diane Salomone, *U.S. Trust, Bank of America*

Julie Wake, *Arts Foundation of Cape Cod*

Maura White, *Philanthropy Partners of the Cape & Islands*

Karen Wood, *Riverview School*

Special Thanks to Our Premier Underwriter!

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AND
ELZA KELLEY FOUNDATION, INC.

Register Today!

Register online at www.capecodgiving.org
Space is limited and this event sells out fast!

Early Bird Registration through Monday, October 19!

Philanthropy Day on Cape Cod

ignite your passion • inspire your game



Now in its 19th year, Philanthropy Day on Cape Cod is organized by Philanthropy Partners of the Cape & Islands and a volunteer planning committee. Attendees are professionals in non-profit organizations of all types and sizes, including their volunteers, board members, and professional advisors such as attorneys, estate planners and others.

www.capecodgiving.org



Registration Form



Tuesday, November 10, 2015 • 8:00 am - 6:00 pm

Resort & Conference Center at Hyannis

Register online at www.capecodgiving.org or return this form (see below)

Registration Fee

Thru 10/19

After 10/19

<input type="checkbox"/>	Attendee(s): All Seminars & Events*	@ \$60	or	<input type="checkbox"/>	@ \$75	=	<input type="checkbox"/>	\$	
<input type="checkbox"/>	PPCI/EPCCC Member(s): All Seminars & Events*	@ \$40	or	<input type="checkbox"/>	@ \$55	=	<input type="checkbox"/>	\$	
<input type="checkbox"/>	Lunch & Awards Only (same registration fee as above required)*							<input type="checkbox"/>	\$
<input type="checkbox"/>	PPCI Yearly Membership			<input type="checkbox"/>	@ \$80	=	<input type="checkbox"/>	\$	

* Names of all table guests are required in advance. Please email mwhiteppci@aol.com or call (508) 280-1822 to submit names.

Registration Information

Name:	
Company or Organization:	
Address:	
Phone:	Email:

Payment Information

Register and pay online or return this form & payment (checks payable) to:

PPCI, PO Box 41, Yarmouthport, MA 02675

<input type="checkbox"/> Check	<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard	<input type="checkbox"/> American Express	<input type="checkbox"/> Discover
Card #	CVV Code			
Name on Card				
Expiration Date	Billing Zip Code			

If you cannot attend for financial reasons and are requesting a scholarship, or if you have any dietary restrictions, please contact Maura White at mwhiteppci@aol.com or call (508) 280-1822.

Early Bird Registration through Monday, October 19!

Increased rates after October 19.

www.capecodgiving.org

PHILANTHROPY
Day
2015



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