

**REGISTRATION**

**7:30 – 8:15 a.m.**

**PLENARY**

**8:30 – 10:00 a.m.**

**The War for Fundraising Talent**  
**Ballroom**

*Jason Lewis*

Fundraising, Jason Lewis CFRE and AFP Master Trainer, starts the conference off with a bang: his honest yet hopeful message challenges the prevailing wisdom about effective fundraising practices, hiring decisions, staff retention, and donor behavior.

Jason says, “While many thought-leaders in the nonprofit and fundraising space are pitching well-intended solutions for reducing donor attrition and professional turnover, I insist that these are merely side effects—symptoms of a much deeper, more entrenched, and messier problem. Our fundamental problem is what I refer to in *The War for Fundraising Talent* as an addiction to arms-length fundraising.”

This hard-hitting session is relevant to all, but especially for smaller fundraising shops that consistently fall short in achieving their fundraising goals. Come with open ears and eyes, and you have the potential to shift the paradigm in your organization.

**Break 10:00 – 10:30 a.m.**

**Morning Sessions – 10:30 a.m. – 12 p.m.**

**EFFECTIVE COLLABORATIONS**

**Cape Cod – 2<sup>nd</sup> Floor**

**Panelists:** *Charlie Sumner, Executive Director, Pleasant Bay Community Boating*  
*Sarah Swain, Founder and CEO, Cape Wellness Collaborative*

Collaborative fundraising is gaining in popularity with funders. The opportunities to reach new heights through partnerships are real. In this session, presenters will share some of the strategies, outcomes, challenges and triumphs that their organizations have experienced through community partnerships.

Groups that have developed partnerships have been able to create winning situations that have strengthened their programs, created a value proposition for both organizations within the community, and helped the nonprofits obtain expertise and skills they might not have been otherwise able to afford. If your organization hasn't thought about community partnerships, you may be missing a golden fundraising opportunity.

## **CAPACITY BUILDING – PART 1**

**We have great programs, but our roof is falling down...**

**Hyannisport – 2<sup>nd</sup> Floor**

*Mark O'Donnell, Senior Vice President and Chief Development Officer, Big Brothers Big Sisters of Massachusetts Bay*

*Victoria Goldsmith, Executive Director, Habitat for Humanity*

Traditionally, funding for nonprofits has focused primarily on core program delivery from one fiscal year to the next. This means that the essential long-term growth and infrastructure of charitable nonprofits are not adequately planned and funded. When funds are allowed for capacity building, **it strengthens a nonprofit's ability to fulfill its mission over time, thereby enhancing the nonprofit's ability to have a positive impact on lives and communities.**

Join us today for this exciting Capacity Building track where we will hear from nonprofit executives who prioritize financial sustainability while ensuring that core organizational resources are funded. The morning session features nonprofit executives who have successfully built financial sustainability into their organizational structures and the afternoon session includes leading funders who are effectively providing grantees with Capacity Building funding.

## **BOARD SESSION – PART 1**

**Board Roles and Responsibilities Wait...That's What I Signed Up For?**

**Bass River – 2<sup>nd</sup> Floor**

**Moderator:** *Attorney Lisa F. Sherman, Partner, La Tanzi, Spaulding & Landreth, LLP*

**Panelists:** *Lynn Mason-Small, Senior Vice President, Chief Marketing Officer, Rogers & Gray Insurance*

*Larry Thayer, Interim President and CEO, Cape Abilities*

*Elizabeth Hardy Wade, Land Acquisition and Permitting Manager, Habitat for Humanity of Cape Cod*

As a board member, this is a phrase you want to avoid thinking, and as the nonprofit organization, this is the phrase you want to avoid hearing! You've been asked to be on a board and you're excited, but do you really know what's expected? Come learn more about the key roles and responsibilities of board members, review and discuss examples of boards gone wrong, and discover how to minimize risk and maximize impact and engagement of nonprofit boards. This workshop is for current and prospective board members as well as nonprofit staff.

This session is sponsored by the Cape and Islands Partnership for Nonprofit Advancement (with special support from The Cape Cod Foundation, CCYP, Community Foundation for Nantucket, Community Leadership Institute of Cape Cod and the Islands, and Suffolk University).

## **DATA**

### **No More Buyer's Remorse! A Four-Step Guide to Evaluate and Select the Right Donor Management System**

**Orleans – 1<sup>st</sup> Floor**

*Maureen Wallbeoff, Google Analytics*

Are you responsible for finding a replacement for your current Donor Management System, and you don't know where to start? Many nonprofit organizations on the Cape & Islands are strapped for resources and must often do more with less. Having the right system in place can really help your small team use data and automation to meet fundraising goals. But with so many systems to choose from and so much to consider, fundraisers often find it challenging to make the right choice

Join an industry expert who will share cautionary case studies and tales of success.

Participants will learn how to:

- Identify the root causes of problems with their current systems
- Collaborate with other stakeholders to define functional and business office requirements
- Research the software market for options that match their needs
- Manage the demo process and set a real budget for implementation
- Translate vendor contracts

And leave with an evaluation worksheet to take back to the office.

## **COMMUNICATIONS - PART 1**

### **From Pitched to Published: Establishing Yourself in a Crowded Media Landscape**

**Centerville – 1<sup>st</sup> Floor**

Judith Goetz , Director of Marketing, Public Relations & Communication, Heritage Museums & Gardens

Ira Kantor, Account Manager from Porter Novelli

To have your organization's message be heard loud and clear, you need to cut through all the surrounding noise to properly reach your constituents. This session will teach you how to gain greater visibility and stealthily market your organization by determining and refining your target audience, reaching them with the right message and the right media strategy, and knowing where and when to insert yourself in the constant news cycle. We also will be taking a look at crisis communications. In today's digital age, news spreads everywhere - and instantly. If a crisis

strikes...it's already too late to act unless you have a prepared strategy. That's why we're also sharing our best PR crisis tactics with you as well.

## **YOUTH SESSION**

### **“ADVANCING YOUR MISSION-FURTHERING YOUR CAUSE”**

#### **The Barnstable Room - 1st Floor**

This session will be an interactive discussion regarding the various causes participants currently support or in which they would like to be involved. How can we further their mission and create fundraising ideas to support their cause?

This will be an exchange between students and presenters in order to share ideas, passions and success stories. Participants will brainstorm ideas on how they can create an event (or something else) that raises awareness, generates financial resources and identifies potential volunteers in order to advance the mission.

#### **Panelists:**

**Mairead Graf**, *Development Officer, Animal Rescue League of Boston*

**Jill Talladay**, *Executive Director of CARE for the Cape & Islands*

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

**Luncheon & Awards – 12:00 – 1:30 p.m.**

**Afternoon Sessions – 1:45 – 3:15 p.m.**

## **MAJOR GIFTS**

**What are you waiting for...Seize the Opportunity!**

**Bass River – 2<sup>nd</sup> Floor**

**Moderator:** *Heather Kelsey, Director of Development, Latham Centers, Inc.*

**Panelists:** *Ian Ives, Sanctuary Director, Long Pasture Wildlife Sanctuary, MA Audubon*

*Mark Pearson, Artistic Director and Producer, College Light Opera Co.*

Building and managing a major donor program is a deliberate and thoughtful process that doesn't happen overnight. Too many small- and medium-sized nonprofits never reach their full potential because they focus their meager resources on foundation grants and annual mailings. One of the primary reasons: discomfort of staff and board members in asking for donations face-to-face. This session will feature three local non-profit professionals discussing how their organizations made personal solicitations a priority.

## **CAPACITY BUILDING – PART 2**

**We have great programs, but our roof is falling down...**

**Hyannisport – 2<sup>nd</sup> Floor**

*Anita Walker, Executive Director, Massachusetts Cultural Council*

*Megan MacDavey, Program Officer, Tower Foundation*

Traditionally, funding for nonprofits has focused primarily on core program delivery from one fiscal year to the next. This means that the essential long-term growth and infrastructure of charitable nonprofits are not adequately planned and funded. When funds are allowed for capacity building, **it strengthens a nonprofit's ability to fulfill its mission over time, thereby enhancing the nonprofit's ability to have a positive impact on lives and communities.**

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## **BOARD SESSION – PART 2**

**De-mystifying the “F” word for Board Members**

**Bass River – 2<sup>nd</sup> Floor**

**Moderator:** *William Simpson, Co-Chair, SCORE Cape Cod and the Islands*

**Panelists:** *Matt Cronin, Founder and President, Boardwalk Business Group*

*David Troutman, Co-Owner, Scargo Cafe*

*Anne Van Vleck, Chief Development Officer, Housing Assistance Corp.*

*Julie Wake, Executive Director, Arts Foundation of Cape Cod*

There you are, innocently perusing your board of directors' orientation binder when suddenly, you see it—the dreaded “F” word. Fundraising! For many, it's a scary thought. Well, don't be scared. This session, intended for current and prospective nonprofit board members, as well as nonprofit staff and volunteers, will offer an interactive format to dissect the different ways board members can be engaged in fundraising (hint, it does not always mean asking for money) along with tips and strategies on becoming more comfortable with fundraising as newly enlightened ambassadors of their organizations.

This session is sponsored by the Cape and Islands Partnership for Nonprofit Advancement

## **ADVOCACY**

### **You are the Champions!**

#### **Centerville – 1<sup>st</sup> Floor**

*Cynthia Wigren, CEO and Co-Founder, Atlantic White Shark Conservancy (AWSC)*

*Joe Carleo, CEO, Aids Support Group*

Championing causes and advocating for policy change is an important part of the work of many charitable nonprofits. For some organizations, it is all they do. In today's program we'll hear from two of our region's leading advocates. Each will share how they have approached their very different kinds of advocacy work and how it has enabled them to fund mission priorities.

## **COMMUNICATIONS – PART 2**

### **You say Tomato: A Session on How to Communicate Better**

#### **Orleans – 1<sup>st</sup> Floor**

*Katie Leeman, Leeman Communications Collaborative*

Chances are, if you work for a mission-driven organization, you are passionate about the cause. But is your passion getting in the way of your ability to communicate effectively?

Do you:

- Feel like you are not being heard
- Overload others with too much information, only to have your message get lost
- Think you could improve your leadership communication style

If any of these apply to you, then this is the session for you! There are two parts to communicating effectively: the message and the messenger–you!

This session will help you to immediately improve on aspects of organizational and interpersonal communication and is guaranteed to make you more effective at your very next meeting. Presenter Katie Leeman has nearly 20 years of experience in nonprofit marketing communications as well as expertise in theater, improvisational comedy, mediation, and diversity and inclusion.

**PLENARY II**  
**3:45 – 4:45 p.m.**

**THE WAR FOR FUNDRAISING TALENT**

**Jason Lewis**

**Ballroom**

Jason Lewis kicked off our morning with a bold challenge – recover from our addiction to cheap, shallow fundraising with meaningful engagement and meaningful support. Empowered with new perspective, how do we begin this journey? How do we align our boards and bosses around a shared understanding of how effective fundraising really works? How do we align these new concepts with those we learned in our breakout sessions? This interactive, wrap-up session will include a complimentary copy of Jason's book (while supplies last) and a chance to win \$1,000 for your organization at this evening's cocktail party.