

Fundraising ^{week in} Boston



CONNECT-LEARN-GROW | JANUARY 25-29, 2021 | #FWIB21

MONDAY, JANUARY 25

1:10 PM – 2:00 PM

Opening Plenary Session with Michael J. VanRooyen, MD, MPH

Presented by

Michael J. VanRooyen, MD, MPH, Director, Harvard Humanitarian Initiative; Chair, Brigham and Women's Hospital Department of Emergency Medicine; Lavine Family Professor of Humanitarian Studies, Harvard TH Chan School of Public Health; Professor, Harvard Medical School

DESCRIPTION

Whether it is working with victims of war and violence at the hands of militias in the Congo or heading emergency medicine at Brigham and Women's Hospital in the middle of the COVID-19 pandemic, Michael VanRooyen has been at the heart of innovations to help people survive under dangerous, life-altering circumstances.

But emergency medicine is so much more than treating large numbers of patients in crisis. It is providing the right kind of care in the right setting to ensure the best outcomes. Hear from Dr. VanRooyen as he describes what Emergency Medicine will look like in the future -- as telemedicine, specialized emergency care for special populations, and other innovations evolve. And during the presentation and our Q&A with Dr. VanRooyen, learn how fundraising is helping to play an important role in making this vision a reality.

As Professor and Director of the Harvard Humanitarian Initiative and Chairman of Emergency Medicine at Brigham and Women's Hospital, Dr. VanRooyen has worked as an emergency physician at the Brigham and with numerous relief organizations in more than 30 countries affected by war and disaster, ranging from Somalia and the Democratic Republic of Congo to Iraq and North Korea. He has worked with non-governmental organizations, including CARE, Save the Children, Oxfam, Physicians for Human Rights and Samaritans Purse International Relief, and been a policy advisor to WHO and the UN. He is also served on the Board of Directors for the International Rescue Committee and testified before Congress and numerous UN briefings. Closer to Boston, he was part of the American Red Cross effort at the World Trade Center on 9-11, helped to coordinate relief efforts in response to Hurricane Katrina, and oversaw the development of a 400-bed surgical hospital in Haiti after the 2010 earthquake. In all his roles, Dr. VanRooyen has been called upon not only to be a skilled clinician, educator, negotiator, and advisor, but also to be a good fundraiser and ally to the professional fundraisers with whom he works.

2:00 PM – 2:05 PM Break

2:05 PM – 3:00 PM Concurrent Sessions (Choose One):

Major Gifts Managers' Roundtable

Presented by

Julia Luu, MIT Sloan School of Management, Senior Associate Director of Development (Moderator)

Sue Andrews, CFRE, Brigham and Women's Hospital, Assistant VP of Development

Julia Mayer, Year Up, Director of Philanthropy

Matt Scheck, Tufts University, Director of Development of Arts and Sciences

DESCRIPTION

Bringing together managers of frontline fundraisers from across all sectors, this facilitated session will use breakout sessions to help you find community, inspiration and tactical guidance. Breakouts will tackle some of the most pressing issues brought about by COVID-19 and working from home; talk about how to set team goals and hold those you manage accountable in this year of the pandemic; and examine how this pandemic has changed you as a manager and how you and others do your jobs.

TRACK: MAJOR GIFTS

Everything You Wanted to Know About the CFRE Exam, But Were Afraid to Ask

Presented by

Ashley Gatewood, CFRE International, Communications and Marketing Manager

DESCRIPTION

Does the idea of sitting for the CFRE Exam put a knot in your stomach? Don't let it put you off from earning our sector's only globally-recognized, accredited certification for fundraising professionals. A CFRE International staff member will explain the ins and outs of the exam and everything you need to know to feel confident and prepared for exam day. Equally important, she will help you see how you can use the CFRE Exam Test preparation to determine your fundraising knowledge gaps so you can ultimately better serve your organization. The presentation will be interactive with audience members encouraged to ask their questions at any point so they can be sure they come away with everything they need to know to take on the CFRE Exam.

TRACK: FUNDRAISING TALENT

Meeting the Moment: Better Fundraising Through Collaborations Inside and Outside our Organizations

Presented by

Nancy Skinner, NSS Advisors, Senior Consultant (Moderator)

Emily Foster Day, Boston Center for the Arts, Co-Executive Director

Benjamin Perkins, Wholesome Wave, Chief Executive Officer

DESCRIPTION

Is it time to revisit your mission and rethink your storytelling? In the face of a global pandemic, nationwide social change, and profound uncertainty about the future, organizations in all sectors are leveraging innovative

collaborations to deepen their commitment to social justice, tell their stories more effectively, and ensure their financial stability. While the missions of the organizations discussed may seem to have little in common, over the past year they have both found creative ways to refocus their programming, strengthen partnerships, and reimagine their fundraising. This comparative case study of two well-established but entrepreneurial organizations will offer insights into how strong internal and external collaborations can transform our storytelling and enable us to create an inspiring and effective response to a changing world.

TRACK: ANNUAL GIVING

3:00 PM – 4:00 PM

Exhibitor Hall

A wide variety of organizations that work to improve the effectiveness of the fundraising industry will be offering information at our virtual exhibitor hall. Simply browse, download valuable resources, or schedule a meeting one-on-one with exhibitor representatives.

4:00 PM Monday concludes

Fundraising ^{week in} Boston



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TUESDAY, JANUARY 26

8:30 AM – 9:00 AM

Exhibitor Hall

9:00 AM – 9:50 AM

Facilitated Networking Sessions – All Are Welcome

We know how isolating the pandemic has been, and how difficult it is to network and meet with people in the field that you may not know very well or at all. Virtual small group networking sessions each morning will provide an engaging way for you to meet and talk comfortably with a small number of fellow professionals in the field. Make a cup of coffee and join us.

Choose any Title from the Blue Sky agenda:

1. Network with attendees from **Health Care**: We got through 2020 (or did we?)
2. Network with attendees from **The Arts**: We got through 2020 (or did we?)
3. Network with attendees from **Higher Ed**: We got through 2020 (or did we?)
4. Network with attendees from **Human Services**: We got through 2020 (or did we?)

9:50 AM – 10:00 AM Break

10:00 AM – 11:15 AM Concurrent Sessions (Choose One)

Don't Ask

Presented by

Bill Ring, Plus Delta Partners, Senior Consultant

Christina Johnson, University of California, Irvine, Senior Director, Engagement & Annual Programs

Mitchell Spearman, University of Texas at Austin, Senior Director of Principal Gifts

DESCRIPTION

As gift officers, we are at our best when our relationships with donors are viewed as partnerships. Securing philanthropic support requires trust, collaboration and honesty. When is it the right time to ask? How do we

determine the appropriate ask amount? How do we help the donor understand the impact of their philanthropy? "Making the Ask" does not have to be scary or a leap of faith. Please join us for a conversation about how we as gift officers can help donors understand the true impact of their investment.

TRACK: MAJOR GIFTS

Breaking the Mold: Women's Leadership in Fundraising

Presented by

Alexis Kanda-Olmstead, Dartmouth College, Director of Advancement Talent Management

DESCRIPTION

Are you leadership material? The answer depends in large part on your identities. Traditional mind models about leaders and leadership skew towards masculinity and other privileged identities, resulting in barriers that hold women back. This has personal as well as organizational costs, including a surplus of incompetent leaders of all genders. In this workshop, participants will explore the unconscious biases we have towards women leaders, debunk common myths about confidence and charisma, and re-conceptualize leadership so that it works for, not against, people whose identities do not fit the traditional leadership mold. In addition, participants will learn the skills of reframing, navigating, and advocating to create change for themselves and others.

TRACK: FUNDRAISING TALENT

Staying in It - White Fundraisers and Sustainable Anti-Racist Action

Presented by

Brianna Boggs, Brianna Boggs Coaching & Consulting, Leadership Coach and Consultant

DESCRIPTION

Do you wonder what your place is as a white fundraising professional in the movement for racial equity? Do you want to get braver, improve your relationships, and strengthen your skills? We will cover basics like white privilege and white supremacy, and how they play out in our roles. Then we will learn approaches to advancing equity in our interpersonal relationships, teams, and organizations. We will examine how to apply these lessons to our development work and products; our organization's materials, events, and proposals; and to our relationships with donors and colleagues. Most importantly, we will talk about the personal side of anti-racism work, making long-term commitments, and preventing burnout. While this session is designed by a white fundraiser with other white fundraisers in mind, we invite our BIPOC colleagues to join the conversation, recognizing that this piece of anti-racist work is ours to do, not yours.

TRACK: ANNUAL GIVING

Successfully Launching a Fundraising Initiative in Uncertain Times: Guiding Principles and Case Studies from Large and Small Shops

Presented by

Sarah Krasin, CCS Fundraising, Senior Vice President

The year 2020 has been filled with crises and social distancing. It has required rethinking many of fundraising's best practices, while philanthropic need has grown in almost every sector. When your strategic vision and mission require transformational philanthropy to solve critical issues, how do you plan for, design, and implement major

fundraising initiatives in a virtual environment amid uncertain political and economic predictions? Through a combination of panel discussion and breakouts that include development leaders from large fundraising shops and small fundraising shops, this session will share tools and case studies from organizations that have launched successful initiatives and raised millions of dollars since March.

TRACK: CAMPAIGNS

Shifting Your Message for Corporate Foundations and Sponsorships

Presented by

Kari McHugh, Dunkin' Brands, Senior Director of Customer and Community Relations & Executive Director of Joy in Childhood Foundation

Molly Wiley, Dunkin' Brands, Director of Field Marketing

Alison Glastein Gray, Pear Associates, President

DESCRIPTION

This session will feature representatives from Dunkin' Brands who make funding decisions for the Joy in Childhood Foundation and the marketing/community relations team. We will explore the ways in which nonprofits should pivot their messaging for foundation vs. corporate asks.

TRACK: CORPORATE AND FOUNDATION RELATIONS

11:15 AM – 12:00 PM Break and Exhibitor Hall

12:00 PM – 1:00 PM

Plenary Session: Measuring Social Change: Challenges for Nonprofits and Their Funders

Presented by

Alnoor Ebrahim, Tufts University, Professor of Management

Scott Schenkelberg, Miriam's Kitchen, Chief Executive Officer

DESCRIPTION

How do you measure progress towards worthy goals like ending homelessness? What results can nonprofits and social enterprises reasonably measure and take credit for? What results should funders look for? How do funders and non-profits think strategically about the results of philanthropic and social change work? Join Professor Alnoor Ebrahim, author of the new book "Measuring Social Change", and Miriam's Kitchen CEO Scott Schenkelberg for a lively discussion on measuring what matters.

1:00-1:10 PM Break

1:10-2:00 PM Concurrent Sessions (Choose One)

How Crafting Better Stories Can Help Frontline Fundraisers Close More Gifts

Presented by

Mike Nagel, EverTrue, Director of Account & Product Marketing

Chris Pinault, Tufts University School of Medicine, Director of Development

Stories inspire and move people to action. And when an institution's story and a prospect's story intersect, fundraising magic happens. In this session, we'll talk about: identifying the stories to tell at your institution; honing

your own narrative as a frontline fundraiser; and how to better understand the stories donors tell about themselves to help identify their giving priorities and affinity. By looking to best practices from experienced fundraisers and for-profit sales reps, we will share lessons on how to craft a pitch, identify the “tentpole topics” that set your program or institution apart, and new ways to find donors whose interests align to institutional needs so that gift officers can work faster to uncover and connect with the best potential prospects and close more gifts.

TRACK: MAJOR GIFTS

The Secret Life of Introverts in Fundraising

Presented by

Loretta Allison, Loretta Allison Consulting, Leadership Development and Talent Management Expert

Christopher Marrion, Fundraising Professional

Ashley Zolenski, Boston University, Associate Director of Leadership Gifts

DESCRIPTION

Our culture and our profession place a high value on the qualities we associate with extrovert personalities. But in reality, development is filled with introverts who understand both that introvert traits are a powerful asset, and how to leverage them to become successful frontline fundraisers and leaders in their institutions. If you are an extrovert and want to get an insider’s perspective on what makes your introvert colleagues tick, or if you are an introvert and feel that you are constantly having to compensate to keep up with your extrovert colleagues, it is time to unleash your potential.

TRACK: FUNDRAISING TALENT

Donor Retention in Times of Uncertainty

Presented by

Steven Shattuck, Bloomerang, Chief Engagement Officer

Kaylin Peterson, Jefferson's Ferry, Director of Philanthropy

Retaining donors during normal times (if such a thing can exist) is already a challenge. For the past five years, the first-time donor retention rate has been dropping consistently, and now flirts with a percentage in the high teens. With the recent pandemic, certain elements of the fundraiser's toolkit are now unavailable: in-person events, face-to-face meetings, and even some aspects of direct mail. During this tumultuous and unprecedented time, what can fundraisers do to maintain donor support in a world that seems upside down? This interactive panel of high-performing organizations will reveal key elements of successful donor retention and stewardship strategies -- from email content to virtual events and meetings -- and how fundraisers can stay positive during trying times.

TRACK: ANNUAL GIVING

Virtual Events: Keep the Best, Let Go of the Rest

Presented by

Liz Page, CFRE, Liz Page Associates, Principal

Amanda Harless, CMP, Liz Page Associates, Executive Producer

Greg Galer, Executive Director, Boston Preservation Alliance

It’s show time in the virtual world! Join us for a case study discussing best practices and lessons learned (sometimes the hard way) about virtual events. We will talk about how to tell the story of your organization’s mission for

maximum impact and how to position your ask for best results when you are transitioning an in-person event to virtual. We will explore items to carry over from your in-person event, new elements to include in the virtual world, and some hard but necessary cuts that will allow your event to thrive online. A case study will examine the Boston Preservation Alliance's 32nd Annual Preservation Achievement Awards, held virtually (with live studio elements) for the first time in October 2020.

TRACK: SPECIAL EVENTS

2:00 PM – 2:05 PM Break

2:05 PM – 3:00 PM Concurrent Sessions (Choose One):

What Do You Do When Your Boss Won't Let You Do Fundraising the Right Way?

Presented by

Simone P. Joyaux, ACFRE, Adv Dip, FAFP, Joyaux Associates

DESCRIPTION

Yes, there is a right and wrong way! Opinion vs. expertise. Bad news from a boss who will not listen. "Ideas" from board members (and the board itself and the fundraising committee) - and you do not need ideas. You have the body of knowledge and books and research and expertise!

TRACK: ANNUAL GIVING

Your Brand Is More Important to Fundraising Than Ever

Presented by

Roger Sametz, Sametz Blackstone Associates, Chief Executive Officer

Lyn Chamberlin, Communications Consultant and former VP Communications at Sarah Lawrence, Vermont College of Fine Arts and the University of New Haven

DESCRIPTION

A strong brand moves prospective donors from "this seems like a good idea" to "I really want to support this organization." With fewer opportunities to demonstrate your organization's vision and purpose on the stage, in the classroom, in the lab, or in the community, powerful stories, strong communications, and consistent messaging frameworks become even more vital in strengthening individual solicitations, annual fund initiatives, and capital campaigns. This session is for frontline fundraisers, executive directors, as well as communications pros. It will include a series of questions to think about in advance, a presentation, plus ample time for attendees to ask questions and share ideas. Learn how to use your organization's brand and strong communications platforms to connect institutional priorities to donor passions, and how a range of non-profits in this current crisis are staying close to their donors and increasing the gravitational pull of their brands.

TRACK: MARKETING AND COMMUNICATIONS

Advancing Societal Change Through Philanthropic Support

Presented by

Elsa Gomes Bondlow, VP of Growth and Partnership Development, Building Impact (Moderator)

Cameran Mason, Museum of Fine Arts, Chief Development Officer

Makeeba McCreary, Museum of Fine Arts, Chief of Learning and Community Engagement

Blair Spotswood Hollis, Museum of Fine Arts, Head of Institutional Relations

DESCRIPTION

Fundraising is a team sport. Institutions continually need to align their internal teams with their mission, needs and resources. The past year has made apparent how institutions have to constantly adapt to ever changing and unexpected events if they are to survive and thrive. In this candid conversation with the development and programmatic leadership at the Boston Museum of Fine Arts we will learn more about how institutions strategize, innovate, and deploy their assets to ensure securing philanthropic gifts that will have the greatest impact on their organization, the community and their mission.

TRACK: FUNDRAISING TALENT

3:00 PM Tuesday concludes

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WEDNESDAY, JANUARY 27

8:30 AM – 9:00 AM

Exhibitor Hall

9:00 AM – 9:50 AM

Facilitated Networking Sessions – All Are Welcome

Virtual small group networking sessions each morning will provide an engaging way for you to meet and talk comfortably with a small number of fellow professionals in the field. Make a cup of coffee and join us.

Choose a Title from the Blue Sky agenda:

1. What's Next for Your Career?: **Strategies For Those New(ish) to the Profession**
2. What's Next for Your Career?: **Navigating The Middle Career Years**
3. What's Next for Your Career?: **Looking Back on an Accomplished Career - Now What?**

9:50 AM – 10:00 AM Break

10:00 AM – 11:15 AM Concurrent Sessions (Choose One)

Principal Gifts in Challenging Times

Presented by

Judy Sager, American Technion Society, Executive Director, Planned Giving (Moderator)

Barbara Gross, BDG Consulting, Principal

Amanda Clark MacMullan, Peabody Essex Museum, Chief Philanthropy Officer

Ellen Reynolds, Museum of Fine Arts, Senior Officer, Principal Gifts and Campaign Planning

DESCRIPTION

Even in the best of times, it is difficult to find, solicit and close principal gifts -- but in these times, what has proven to be successful? Can we learn from years past how to approach donors for transformational gifts? What do we as fundraisers need to know and how do we put those skills to use so that we are successfully raising principal gifts?

TRACK: MAJOR GIFTS

When Diversity, Belonging, Inclusion and Equity Meet

Presented by

Dananai S. Morgan, Museum of Science, Associate Director of Leadership and Planned Giving (Moderator)

Brianna Boggs, Brianna Boggs Coaching & Consulting, Leadership Coach and Consultant

Aisha Francis, Benjamin Franklin Institute of Technology, Chief Executive Officer

Latoya Gayle, Boston School Finder, Executive Director

Yolanda F. Johnson, Women of Color in Fundraising and Philanthropy, Founder

DESCRIPTION

This panel will delve into the intersection of diversity, belonging, inclusion and equity with philanthropy. In addition to identifying as BIPOC (Black, Indigenous, and People of Color), panelists represent decades of experience in philanthropy and fundraising across different industries. Attendees will learn how institutions and leaders can leverage their power to center Black, Indigenous and People of Color's experiences, create inclusive spaces and practices, and retain BIPOC communities as part of the talent pipeline making an impact and advancing their institutions' missions.

TRACK: FUNDRAISING TALENT

Catalyze the Collective: Getting Your Board on Board with Annual Unrestricted Giving

Presented by

Cristine More, CFRE, Wentworth-Douglass Hospital, Vice President & Chief Philanthropy Officer

Marvin Vilma, Educator, entrepreneur, nonprofit professional, and former Annual Giving Officer at MIT Sloan

DESCRIPTION

Board support for an organization's annual unrestricted fund is critical in building a culture of philanthropy with both internal and external constituents. Many board members will support specific fundraising initiatives, and consciously not support annual unrestricted giving. What effect does this have on your organization's fiscal stability? In this session, you will learn how to position annual unrestricted giving so donors/prospects understand the value of unrestricted gifts, and how you can help your board members realize the importance of unrestricted giving and become champions of unrestricted support.

TRACK: ANNUAL GIVING

The Path Between Front Line Fundraisers and Data Analytics

Presented by

Kate Villa, CCS Fundraising, Corporate Vice President

John Sammis, CCS Fundraising, Senior Data Scientist

Kate Villa, Corporate Vice President and John Sammis, Senior Data Scientist of CCS Fundraising will discuss how a strong fundraising plan informed by data is critical to achieve transformational philanthropic goals. Conducting an in-depth review and analysis of your data and prospects and pairing those results with relationship mapping allows frontline fundraisers to focus their valuable time on the prospects that have the most potential. This session will share an overview of the tools to conduct analysis as well as strategies to shape a segmented fundraising plan

informed by data. This will enable shops both large and small to use resources wisely to create the individual strategies and relationships that inspire each donor to make their most significant commitments.

Grantmaking in the Time of COVID-19

Presented by

Sarah Jackson, Sarah J Consulting, President (Moderator)

Patti Baum, New Hampshire Children's Health Foundation, Program Director

Michael Devlin, Harvard Pilgrim Health Care Foundation, Director of Grants and Initiatives

SueEllen Kroll, Barr Foundation, Program Officer, Arts & Creativity

Karen Ristuben, Essex County Community Foundation, Program Director, Creative County Initiative

DESCRIPTION

Join a prestigious panel of representatives from the Barr Foundation, Essex County Community Foundation, Harvard Pilgrim Health Care Foundation, and the New Hampshire Children's Health Care Foundation to explore how foundations are making decisions during this time when so many are in need. What advice do foundations have for grant writers and grant seekers, given that we will continue to function in an unpredictable environment for some time? Panelists will share their perspectives and experiences regarding grant award decision-making because of the pandemic and answer questions from the audience on grant seeking during uncertain times.

TRACK: CORPORATE AND FOUNDATION RELATIONS

11:15 AM – 12:00 PM Break and Exhibitor Hall

12:00 PM – 1:00 PM

Massachusetts Gives Awards Celebration

Presented by AFP Massachusetts - Join us for our annual awards program honoring Boston's top philanthropists, volunteers, and development professionals. ***Tickets sold separately.***

1:00-1:10 PM Break

1:10-2:00 PM Concurrent Sessions (Choose One)

What Does Major Gifts Work Look Like in Different Sizes and Sectors?

Presented by

Kate Gutierrez, Massachusetts General Hospital, Senior Director of Development, Major Gifts

Rohan Barrett, Harvard Medical School, Senior Director of Development, Principal and Major Gifts

Marie Louise Greenidge, Saint John Paul II Catholic Academy, Director of Advancement

Maureen Peña, The Peña Network, Founder

This session will demystify what major gift officers do in different sectors and shop sizes. Attendees will learn what comprises major gifts in higher education, healthcare, arts, and small non-profits. Fundraisers who are thinking of moving into major gifts work from other areas will gain knowledge about what is expected by different organizations. Hear from expert major gifts professionals on their professional journey and how they made transitions into new organizations, both large and small. Attendees can also learn the language and methods used to develop major gift prospects and proposals. During the session, there will be opportunities to ask questions, network among the group in breakout sessions, and come back at the end as a large group for the final Q&A.

TRACK: MAJOR GIFTS

Career Taboos: Stories of Missteps and Resilience

Presented by

Molly Richter, Mass General Brigham, Assistant Director, Development (Moderator)
Carlisa Brown, The Salvation Army Massachusetts Division, Chief Advancement Officer
Jennifer Herrmann, Graham-Pelton, Vice President
Joe Notari, Consultant

DESCRIPTION

Eventually in everyone's career comes the day when you realize you have missed the boat – sometimes literally. Did I leave this job too soon? Have I been in this job too long? What if I do not meet all my metrics? Am I good manager? How do I bounce back from a career wrong turn? Should I have canceled all my other meetings to join that prospect on their yacht? We all have moments in our careers where we must make a choice – and the choice that is right for you might look like the wrong choice to someone else. Hear the panelists' stories and the lessons they learned in hopes that it will help you with your own choices. If you are feeling brave, come prepared to share your own taboo moment and seek the panel's advice.

TRACK: FUNDRAISING TALENT

Relationship Fundraising 3.0: Lessons from Social Psychology to Double Giving

Presented by

Adrian Sargeant, Co-Founder and Co-Director of the Institute for Sustainable Philanthropy & Adjunct Professor of Philanthropy at the Lilly Family School of Philanthropy at Indiana University

DESCRIPTION

This session will explore what we can learn from the science of how human beings form relationships to inform how we might build stronger and more fulfilling relationships with our supporters. We will look at the concepts of dispositional mindfulness, self-verification, self-enhancement, the theory of identity fusion and more. We will also take a dive into the science of identity and thus “who we are” when we give and how that differs from simple motivation. We will then look at how to focus on these different types of people and how giving can add value by contributing to their sense of wellbeing. The session will showcase examples of where giving doubled by applying these principles.

TRACK: ANNUAL GIVING

Getting Creative When You Cannot Hire

Presented by

Victoria Jones, Development Guild DDI, President

Lisa Rowan Gillis, United Way of Massachusetts Bay and Merrimack Valley, Chief Development Officer

DESCRIPTION

For many reasons – not all intuitive – nonprofits have been subject to organization-wide hiring freezes, to make cuts when they were not certain they would hit fundraising goals, or simply to hunker down for the worst by managing expenses. Even though we know fundraising should be viewed as a revenue producing undertaking, we have not all been able to weather the storm of COVID and implications of the pandemic. And fundraisers have found it harder to argue this logic given all that has fallen on their organizations. Still, many nonprofits have found ways to be creative at doing more with less, at reprioritizing work, and have even taken this time to really evaluate the strengths and gaps in their programs and their talent. We have prevailed in many cases! Join us to learn how United Way raised \$15M more with fewer staff and hear other stories of triumph despite staff reductions.

TRACK: FUNDRAISING TALENT

2:00 PM – 2:05 PM Break

2:05 PM – 3:00 PM Concurrent Sessions (Choose One):

Identity-Based Fundraising ~ Pot of Gold, No Leprechaun Required

Presented by

Tom Ahern, Tom Ahern Donor Communications, Donor Communications Specialist

DESCRIPTION

"Why should I give you my hard-earned money?" Answer this question well ... and you will never be short of funds. Answer it poorly ... and fundraising becomes an unholy struggle. In this revealing session, one of North America's most experienced case creators shares his secrets for effectively selling your projects, programs, endowments, initiatives, buildings, renovations, and bright ideas. It is based on Tom Ahern's recently released book of the same name. In 2016, the New York Times called Tom Ahern "one of America's most sought-after creators of fund-raising messages." Recent clients include USA for UNHCR (fundraising for refugees), Ithaca College, the Marine Mammal Center, the Institute for Sustainable Philanthropy (UK), Teach for America, the Sharp Healthcare system in San Diego, Boys & Girls Clubs of America, Lucile Packard Children's Hospital at Stanford University, Save the Children Global, Lollypop Farm (animal rescue), Junior Achievement, and Chabad on Campus. His services for these various clients include case development, direct mail, donor newsletter development, donor comms audits, online course development and staff training. His specialty? Changing underperforming donor communications programs into major moneymakers, using the latest discoveries in psychology and neuroscience. He has authored seven how-to books on donor communications and speaks internationally.

TRACK: ANNUAL GIVING

Getting a Grant Out the Door

Facilitator: Alison Glastein Gray, President, Pear Associates

Break-out Facilitators:

Large Nonprofit: Bethany Allen, Senior Director of Advancement, Advocates

Government/Public Agency: Karen Watts, Grants Director, Brockton Public Schools

Small Nonprofit: Sue Marble Cuthbert, Director of Development, Project HOPE

Complex Organizations: Rebecca Gavin, Vice President, Annual, Planned & Institutional Giving, Dana Farber Cancer Institute

DESCRIPTION

This session will focus on the steps needed once a grant is written and before it can be submitted—including reviews, approvals, processing, contracting, finance review, etc. The session will begin as a large group and then move into smaller breakouts for larger and smaller organizations that face different challenges. For example, large shops may need to learn how to work with their grants/sponsorship office and navigate multiple layers of complexity, while small shops may rely on their executive director to work on all grants without the benefit of internal partners or checks and balances. Breakouts will be facilitated by experts who have navigated these processes in small and large organizations in multiple sectors. After the breakouts, the entire group will reconvene to learn from each other and explore similarities and differences.

TRACK: CORPORATE AND FOUNDATION RELATIONS

Get Scrappy: Communications Strategies for Smaller Fundraising Shops

Presented by

Neal Kane, Libretto, President

DESCRIPTION

Even before COVID, smaller shops faced challenges reconciling their philanthropic ambitions with limited communications budgets. In this session you will learn strategies for creating and sustaining donor engagement when it may not be an option to enlist outside communications support. Learn about the latest trends, best practices, and new ideas being deployed at organizations and institutions of all sizes – both pre-COVID and in response to the pandemic. In addition to fundraisers from smaller shops, this talk is suitable for individuals who work in a targeted fundraising capacity within a larger organization.

TRACK: MARKETING AND COMMUNICATIONS

3:00 PM Wednesday concludes

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THURSDAY, JANUARY 28

8:30 AM – 9:00 AM

Exhibitor Hall

9:00 AM – 9:50 AM

Facilitated Networking Sessions – All Are Welcome

Virtual small group networking sessions each morning will provide an engaging way for you to meet and talk comfortably with a small number of fellow professionals in the field. Make a cup of coffee and join us.

Choose one from today's Blue Sky agenda:

1. **Small shops, big problems**
2. **Navigating large shop culture**

9:50 AM – 10:00 AM Break

10:00 AM – 11:15 AM Concurrent Sessions (Choose One)

Discovery in the Age of Zoom

Presented by

Kristina Lentz Capano, Boston University, Assistant Dean for Development & Alumni Relations, College of Health & Rehabilitation Sciences: Sargent College (Moderator)

Cathi Ianno, Speak Easy Stage Company, Director of Development

Josephine Madhok, Boston University, Associate Leadership Gift Officer, New England

Sheila Zarba-Campbell, St. Francis House, Campaign Director

DESCRIPTION

The hardest part of a front-line fundraiser's job is getting that first contact, that first meeting. It was difficult enough before the pandemic, but with an added layer of the limitations we are all now facing about in-person meetings (not doing them, doing them through video chat, doing them through audio calls, attempting to meet out of doors) takes this challenge to new levels. Or does it? Join seasoned professionals for a panel discussion of tried-and-true

techniques as well as innovative new approaches to ensure our pipelines continue to be replenished, whether our meetings happen in person or through other mediums!

TRACK: MAJOR GIFTS

So You Want to Be a CDO

Presented by

Libby Roberts, Lindauer Global, Senior Vice President (Moderator)

Aziza Musa, Health Leads, Vice President of Development

Paula Sakey, Boston Public Library, Executive Director and CDO

Tom Woodward, Clark Art Institute, Chief Advancement Officer

DESCRIPTION

Perhaps you are one of the many who are eager to learn from seated CDOs and career experts about how to manage your career path so you will position yourself to be #1. These nonprofit veterans have had exciting and robust careers as they juggled balancing family, careers and community life. They will describe how they decided to stay put, or how they knew when to move on to some of the nation's premier organizations. Each will share an exclusive history of how they navigated their careers, reinvented themselves and kept it healthy, lively and fun. The goal of this panel is to offer career-making and breaking observations for both candidates and hiring managers.

TRACK: FUNDRAISING TALENT

Giving Days: Is the Juice Worth the Squeeze?

Presented by

Sean Devendorf, Tufts University Advancement, Senior Director, Annual Giving

Georgina D'Cruz, Boston Trinity Academy, Capital Campaign Associate, Alumni Engagement Coordinator, Director of Marketing

Julia Motl Lowe, Tufts University Advancement, Director of Annual Giving Strategy Initiatives

DESCRIPTION

In the face of a global pandemic, nationwide social change, and profound uncertainty about the future, organizations in all sectors are looking for creative ways to engage their constituents to help meet fundraising goals. Panelists who represent organizations of varying sizes, budgets, and missions will share how their Giving Day programs have helped raise more funds, engage new and loyal donors, and promote their organizations' missions. Hear about mistakes and successes, discuss staffing and budgeting needs, and learn timely, creative ways to position a Giving Day program that is right for your organization in changing economic and philanthropic times.

TRACK: ANNUAL GIVING

Neither Shaken, Nor Stirred: How to Stay Cool in the Midst of Chaos

Presented by

Jeff Stanger, CFRE International, Education Resources Director

DESCRIPTION

Pandemics, elections, and economic uncertainty – How can you remain unflappable and chart a course for your fundraising career during the challenges we face? This session will examine concrete steps to boost your career marketability; how the current climate parallels and differs from the 2008 recession and how this impacts your

career; what kinds of work experience and certifications you may want to pursue; when is it time to stay or move on from a current position; what research and data makes you indispensable; and what insights we learned in 2008 may be applicable in 2021 both for fundraising and career success.

TRACK: FUNDRAISING TALENT

Do You Know Your Moral Compass?

Presented by

R. Scott Fortnum, MA, CFRE, ACFRE, Children's Health Foundation, President and CEO

Mary Doorley Simboski, MS, ACFRE, Managing Director, Changing Our World & Lecturer, Boston University

DESCRIPTION

Fundraisers are at the front lines of social justice and equity. As professionals raising money to carry out missions, our work is challenging and intense. This will be a non-synchronous workshop providing tools to help fundraisers reflect on and define their ethical codes of conduct. You will be encouraged to watch a recorded session, review a reflection guide, and do some brief suggested readings in advance. Attendees will then join at this time for a live, real-time "meet up" to discuss how our professional conduct is shaped by personal experiences.

TRACK: ETHICS

11:15 AM – 12:00 PM Break and Exhibitor Hall

12:00 PM – 1:00 PM

All-Star Plenary on Donor Retention

Presented by

Simone P. Joyaux, ACFRE, Adv Dip, FAFP: Joyaux Associates

Jay Love, Co-Founder and Chief Relationship Officer at Bloomerang

Adrian Sargeant, Co-Founder and Co-Director of the Institute for Sustainable Philanthropy & Adjunct Professor of Philanthropy at the Lilly Family School of Philanthropy at Indiana University

DESCRIPTION

Do you want to raise more money? Regularly and forever? Compare your donor retention rate with the bank's customer retention rate – or the local bakery. Oh my gosh! We charities are so often awfully bad! For sure, it is time your charity learns and applies the highly useful academic research. Maybe it is time for your fundraising team (and your whole organization) to embrace the useful relationship-building strategies. And (just maybe), you need some tough tips about how to stop the ignorant behavior and personal opinions running through your charity.

1:00 PM – 3:00 PM

Independent Networking Opportunities

Just connect. Join one of the Tom Ahern office hours or check out the Exhibitor Hall and choose one of the sponsor hosted Zoom meetings that will take place this afternoon. Times and Zoom links are provided in the sponsor's exhibitor space in italics.

Fundraising ^{week in} Boston



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FRIDAY, JANUARY 29

8:30 AM – 9:00 AM

Exhibitor Hall

9:00 AM – 9:50 AM

Facilitated Networking Sessions – All Are Welcome

This is the last facilitated networking session of the conference!

Choose one from the Blue Sky agenda:

1. So what did I learn this week anyway? - Join this one if you are **New to Fundraising**
2. So what did I learn this week anyway? - Join this one if you are a **Veteran in the Field**

9:50 AM – 10:00 AM Break

10:00 AM – 11:15 AM Plenary Session

The Future of Philanthropic Leadership in Boston

Presented by

Eric Esteves, The Lenny Zakim Fund, Executive Director

Edward E. Greene, Board of Trustees, MFA

Jocelyn Sargent, Organizer, The New Commonwealth Fund and former President, Hyams Foundation

Andrea Taylor, Trustee, Boston University

The Friday plenary provides an opportunity to hear from some of the recently appointed, top philanthropic and civil leaders reshaping the future of philanthropy in Boston. Signaling an important positive change in institutional decision makers in our sector and city, these senior leaders of color head the main philanthropic institutions in Boston, from community foundations to higher education to the arts. They are part of a moment that is expanding the conversation on the local and even the national landscape of what philanthropy has been, opportunities for what it is today, and the movement it can become.

As donors, development professionals and communities continue to exponentially diversify, our community and the country grapple with issues of equity, racial justice, systemic social inequality and health disparities during a pandemic. How are organizations preparing themselves, while simultaneously responding to their missions and creating philanthropic change? How do these leaders see the opportunities and challenges ahead as they face their new roles and reassess their development staff in a virtual workplace environment?

11:15 AM Conference concludes