

**8:05 - 9:05 a.m. - MORNING PLENARY - GRAND SALON FOURTH FLOOR**

*In Support of Social Impact: History, Ethics, and Human Behavior*  
 Presented by Roger Brooks, President & CEO, Facing History and Ourselves

**9:15 - 10:15 a.m. - BREAKOUT 1 (Choose a Session)*****Evolving Stories for Evolving Organizations***

**Bart Reidy, Boston Symphony Orchestra; Becky Crawford, Boys and Girls Clubs of Boston; Moderated by Libby Roberts, Lois L. Lindauer Searches**

Where would we be without great stories? Organizations must constantly evolve and so must the stories you tell so that your donors connect with your mission and feel inspired to support your work. Becky Crawford and Bart Reidy became CDOs after first being communications experts. Before running development shops at the Boys & Girls Clubs of Boston and the Boston Symphony Orchestra, they knew how to create compelling, relevant and ever-changing narratives for their institutions.

*#annualgiving, #leadershipandmanagement, #campaigns, #communications*

***Making the Ask - Who Says that Needs to be the Hard Part?***

**Christopher Thomas, American Cancer Society**

This presentation will cover specifics about making the ask framed in the context of the overall donor process. While we don't get any money without asking, the stress level is much less and the amount a donor will give often more when the process is done correctly. And remember the worst that can happen is they say no - which is often step one toward the eventual gift. Audience participation is encouraged - and feel free to bring your favorite solicitation stories. *#majorgifts, #emergingleaders, #smallshops*

***Maximize Talent in Your Organization: Measuring and Promoting Success***

**Amy Bronson, Boston University; Ellen Gilmore, MIT; Patricia Gil-Casares, Boston University; Moderated by Tracy Marshall, Development Guild DDI**

Given the ongoing war for fundraising talent, it is crucial that you know how to best deploy and grow your talent. With the rise of strategic talent management as well as data analytics in the not for profit sector, many shops are finding new ways to maximize performance. This panel will address the trends, outcomes and ongoing developments that show how new methods of measuring and looking at staff performance can influence your culture and affect your bottom line. *#talentmanagement, #kdm*

***Enterprise Philanthropy - An Entrepreneur's Perspective on Playing to Win***

**Josh Trautwein, Fresh Truck; Rosalind Smith, Woman Empowerment Initiative for Change; Sam Greenberg, Y2Y; Moderated by Paul Swindlehurst, Seacoast Philanthropy Services**

Join three of Boston's most innovative, successful entrepreneurs as they reveal how taking non-traditional approaches to business creation and philanthropy has been a key to their success. The amazing growth of their charitable businesses has been powered by effective storytelling, great branding, and a disciplined approach to financial development and forecasting. Learn how they leveraged these and other strategies to great effect. *#kdm, #leadershipandmanagement, #communications, #emergingleaders, #smallshops*

***Legacy Foundations and New Wealth Foundations***

**David Gordon, MIT; Alix Cantave, W.K. Kellogg Foundation; Danielle Kleinberg, DEK Associates Consulting; and John Parker, Springhood**

For many years, the agendas of legacy foundations have set the tone for giving by all foundations. But recently, that dynamic has arguably flipped, as more and more foundations set up by today's biggest donors have raised new expectations for donor involvement in foundation giving. How do these different models for giving compare and contrast with one another? Has the paradigm truly shifted, or, do legacy foundations still drive the major trends in the field? *#kdm, #corporateandfoundationrelations, #leadershipandmanagement*

***How to Maximize Your Philanthropy through Planned Giving***

**Susan Veroff, Museum of Fine Arts, Boston**

So you are not an expert planned giving professional? This session will cover what you need to know in order to optimize philanthropic support through planned gifts. Learn about the motivators for giving and use of specific vehicles that can be leveraged with or without a developed planned giving program to enable significant commitments. *#plannedgiving, #majorgifts, #emergingleaders*

***The Zany Powers of Fundraising Data Science: How Automated Estimation, Predictive Modeling, and Unsupervised Learning are Integrated into the Prospect Development Process***

**James Cheng, Memorial Sloan Kettering Cancer Center**

How data management allows for automation of certain processes; Predictive modeling helps with the analysis of prospects for the identification and verification for potential high-end donors; and insights for portfolio optimization from data visualization. Based on a case study. *#researchandanalytics, #majorgifts, #leadershipandmanagement*

**10:30 - 11:45 a.m. - BREAKOUT 2 (Choose a Session)*****Three Ingredients for December Success***

**Katie McDonnell, Sarah Dunlap, Chelsea Feinstein, Laura Soucy - Partners In Health** One-third of the year's donations. Four weeks in December. And 11 months of preparation. Successful year-end fundraising starts January 1st, whether it's email, direct mail, or social media. The sum of these channels equals millions of dollars--when done right. Join the team behind the movement to bring health care to the world's most vulnerable communities, one dollar at a time. *#annualgiving, #leadershipandmanagement, #communications*

***Effective Cultivation Techniques: The Ties that Bind***

**Anne Melvin, Harvard University**

Effective, strategic cultivation is what distinguishes a solid fundraiser from a really outstanding performer. Are these skills firmly in your wheelhouse? We all know that moves management is essential to moving a prospect from mildly interested to wildly supportive. But how do you do that? What is the secret? There are many, and in this session, we will explore the multiplicity of things you can do to engage and inspire your prospect. From creative engagement moves to asking probing questions that get at the heart of what gets your prospect's juices flowing. *#majorgifts, #emergingleaders*

***Career Ladder or Career Lattice?***

**Gregg Carlo, Boston University; Kaja Fickes, WGBH; Patsy Fisher, Brandeis University; Christine Cruzvergara, Wellesley College; Moderated by Libby Roberts, Lois L. Lindauer Searches**

Each of the panelists have had exciting professional lives while juggling and balancing family, career and community life. These nonprofit veterans will offer career-making – and breaking – observations for both candidates and hiring managers. They will describe how they coach others as well as how they decided to stay put, and when they knew it was time to leave some of the nation's premier organizations. *#talentmanagement, #emergingleaders, #professionaldevelopment*

***The CEO/CDO Relationship: Navigating through Difficult Situations***

**Abby Maxman & Shelley Goode, Oxfam America; Moderated by David Woodruff, MIT**

An aligned and trusting relationship between the Chief Executive Officer and Chief Development Officer is critical to driving the mission, programs, and development of any organization. Two officers from Oxfam America, a leading global organization working to end the injustice of poverty, will discuss their personal insights on this important relationship and their approach to fundraising, operations and personnel. *#kdm, #leadershipandmanagement*

***Engaging Colleagues to Maximize Foundation Success***

**Diane Newark and Bethany Allen, Advocates**

This session will utilize two case studies to illustrate how to get buy-in across agency for foundation proposals. We will talk about how Advocates engaged multiple internal stakeholders to identify priorities, obtain funding and gather meaningful data to report to foundations. *#corporateandfoundationrelations*

***Shades of Gray: Managing Ethical Dilemmas***

**Mary Doorley Simboski, ACFRE, CareDimensions**

Are we really ethical? Have we truly honored donor intent in our transactions? Do CEOs and DODs always agree on ethical fundraising? The annual compilation of actual ethical errors and missteps will be shared (anonymized). This interactive session will engage participants in discussions of what is and what is not ethically acceptable. *#ethics, #emergingleaders, #smallshops*

***Capital Campaign Messaging: Not Business as Usual***

**Neal Kane, Libretto; Cheryl Crouse, Salem State University; John Hayes, UMass Medical School**

Hear from Cheryl Crouse, Associate Vice President of Institutional Advancement at Salem State University, John Hayes, Vice Chancellor for Advancement at UMass Medical School, and Neal Kane, President of the communications firm Libretto, to learn how they approached the development of campaign themes, messaging, and public-facing communications that positioned two successful campaigns with different constituencies, dollar goals, and success metrics to raise \$25 million and \$250 million respectively. *#campaigns, #communications*

**11:45 - 1:30 p.m. - KEYNOTE LUNCHEON - GRAND SALON FOURTH FLOOR**

***What Does It Take to Succeed? A Conversation with Fundraising Leaders Tamara Rogers and Sue Paresky - Interviewed by Gary Gillis***

**2:00 - 3:15 p.m. - BREAKOUT 3 (Choose a Session)*****How to Write Your Best Annual Appeal - Shark Tank Style***

**Judges: Maura King Scully, MKS Communication; Tracey Palmer, Palmer Communications; Master of Ceremonies: Paul Barry, Cape Cod Mail Group**

This is a unique session where attendees will observe fundraising professionals making a case for their best annual appeal idea. Like TV's Shark Tank program, a panel of judges will hear each case live and choose the winning presentation. Dialogue between candidates and judges is sure to present valuable insights for anyone who works in annual appeal campaigns. *#annualgiving, #communications, #smallshops*

***Creating Enduring and Transformative Partnerships with Donors***

**Amanda Clark MacMullan, Peabody Essex Museum; Cynthia Albert Link, Berklee School of Music; Judy Sager, Whitehead Institute; and Susan Lewis Solomont, The Philanthropic Initiative**

Who are these donors and how do you engage them? What methods can you use to keep them engaged? What processes work best for these partnerships to build lasting relationships that result in major philanthropic support and participation? Learn from two CDOs, a philanthropic advisor and a philanthropist, on what has successfully worked for their organizations. *#majorgifts, #plannedgiving, #kdm*

2:00 p.m. - Continued

**Finding and Keeping Top Talent**

**Nancy Simpson-Banker, FAHP, Accordant Philanthropy and Molly Richter, Partners Healthcare**

The average turnover rate for development professionals is two years. The direct and indirect cost of finding a replacement is high. The lost opportunity cost is immeasurable. This session will explore the reasons for the high turnover and strategies for finding, keeping and measuring top talent. #talentmanagement

**Trends in Philanthropy**

**Panel led by Brian Nevins of CCS Fundraising**

Have recent events changed how we operate? Join a panel of CDOs, moderated by Brian Nevins of CCS Fundraising, for a 30,000 foot discussion about the effects of world events on our industry. Using long-term and short-term data trends from Giving USA - and panelist and client experiences - we will discuss the pressing issues and encourage audience participation for a lively session.

#kdm, #leadershipandmanagement

**Ten Ways to 10x Your Success with Businesses (and Everyone Else!)**

**Joe Waters, Selfish Giving**

Win-win partnership expert Joe Waters will share the 10 ways to unlock six-figure partnerships with businesses. From identifying the most lucrative type of businesses partners to creative strategies to become a magnet for opportunity, Joe's advice will help you raise more money from companies - as well as individuals and foundations!

#corporateandfoundationrelations, #smallshops

**Prospecting Ideas for Planned Giving Donors: The Changing Wealth of Donors**

**Charles Glassenberg, Combined Jewish Philanthropies**

Changes in how we live and work, increasing longevity and the decline of the federal estate tax have changed the landscape for planned giving in the 21st century and created new opportunities for securing meaningful legacy gifts. This session will look at how to identify planned giving prospects, and give real life examples of how donors have created meaningful planned gifts for the charities that they love. There will be a particular emphasis on planned giving opportunities related to rise in popularity of donor-advised funds. #plannedgiving, #majorgifts

**Research for the Non-Researcher**

**Melissa Bank Stepno, Blackbaud, Target Analytics**

Successful major gift fundraising is not always about finding the wealthiest person in your database. It is about focusing efforts on prospects who have the wealth and interest to make a major contribution to your organization. Are you targeting your best prospects or simply focusing on the most obvious candidates? Or, are you not confident in your ask amounts because you don't know if you are asking too much or too little? If you don't have a professional researcher on your side to help you, how can you quickly assess your organization's best prospects to focus your major gift efforts appropriately.

#researchandanalytics, #emergingleaders, #smallshops

3:30 - 4:30 p.m. - BREAKOUT 4 (Choose a Session)

**Effectiveness versus Efficiency: Leveraging Your Data to Raise More Money**

**Gary Henriksen, Five Maples and Sarah Gnerre, Fundraising Consultant**

All businesses track key performance indicators and use them to guide decision making. While large fundraising shops may have staff devoted to analytics, this can be a challenge for medium and smaller shops. We will cover why use analysis, what to measure, how to measure it, and how to take action based on the metrics, including use of the AFP-NNE Growth thru Giving Report and Fundraising Fitness test.

#annualgiving, #researchandanalytics, #emergingleaders

**Building a Board from a Major Gifts Perspective**

**Chris Bentson, Building Educated Leaders for Life; Katelyn Quynn, Hebrew Senior Life; Sharon Stanczak, CFRE, Whitehead Institute; Moderated by Suzanne Battit, Development Guild DDI**

Having the right board fuels the success of any non-profit organization. Board recruitment ranks as one of the most important tasks for any non-profit, large or small, yet it has become much more challenging with so many organizations looking for strong board members. In this session we will discuss best practices for board recruitment and development, especially as it relates to major gift work. #majorgifts, #campaigns, #kdm

**Breaking the Cycle of Employee Departures - Keeping Young Talent**

**Sarah Connelly, Girl Scouts of Eastern MA; Molly Grannell, Girl Scouts of Eastern MA; Alejandro Sutphen, IBA; Moderated by Maureen Peña, The Peña Network**

It is well known that a cycle of millennial departures exists. This discussion will probe and focus on specific ways management can retain millennial employees. The discussion is also geared towards emerging leaders and how they can become more engaged and avoid switching jobs too soon. #talentmanagement, #emergingleaders

**Leveraging Trends to Cultivate Effective Relationships**

**Travis Kilpatrick, Liberty Mutual Foundation & Alana Hill, College Bound Dorchester**

The stream of data and trends in philanthropy today comes at an ever-changing rate. With such a wide range of recommendations and examples available to all, how do you

sift through the details and prioritize what your organization needs in order to fund raise well. #kdm, #leadershipandmanagement, #communications, #researchandanalytics

**Helping Organizations Think Bigger**

**Sara Robinson, CFRE, Celebrity Series of Boston; Ellie Starr, Museum of Science; Moderated by Julie Rafferty, Rafferty Communications Strategies**

Sometimes organizations have exciting, visionary gift opportunities hiding in plain sight -- and donors willing to fund those ideas at large levels if presented as a bold vision that aligns with the donor's philanthropic goals. How do you as a fundraiser help your leadership create larger giving opportunities by packaging existing needs with new ideas in ways that excite donors? How do you help organizational leadership become more comfortable asking for large gifts? #corporateandfoundationrelations, #majorgifts

**Effective Management for Inclusion**

**Panel led by Ahmed Mohammed, Dir. of Talent Acquisition, Harvard Medical School**

Fundraising managers and leaders today have heard over and over why it is important to manage diversity and inclusion on their teams but few understand how. During this session, you will observe your conscious and unconscious actions, discuss sets of behaviors that engender a sense of inclusion in the face of diversity, and address key questions to help you become a more effective and inclusive manager.

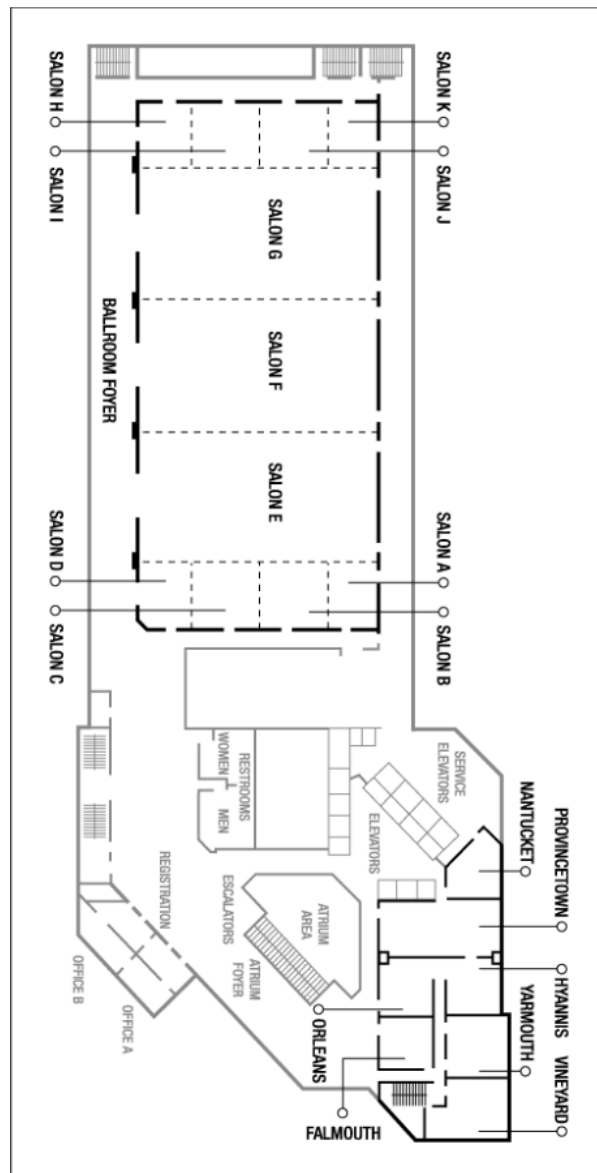
#talentmanagement, #leadershipandmanagement, #emergingleaders, #kdm, #smallshops

**Campaigns That Aren't Capital: Raising More Money to Achieve a Vision**

**Presented by Kate Villa, CFRE, CCS Fundraising**

The phrase "capital campaign" is well understood by volunteers, boards, and even donors in 2018. But sometimes, we need to mount major campaigns focused on endowment or programs and our campaign just isn't capital. What is the same? What is different?

#leadershipandmanagement, #campaigns, #plannedgiving, #emerging leaders



Floor Map