

2010 Nonprofit Summit



A Stimulus for Increased Effectiveness

Sponsored by



*March 25, 2010
8 am - 4 pm*

*Francis Scott Key Conference Center
at the Holiday Inn
5579 Spectrum Drive
Frederick, MD 21703*

in partnership with



The
Community
Foundation of
Frederick
County

Luncheon Sponsored by
The Compass Group



*9 Local, Low-Cost Workshops with Renowned
Experts for Board Members, Executives,
Marketing-Fundraising Professionals &
Volunteer Managers!*



JOIN US FOR A DAY OF NONPROFIT EMPOWERMENT!

Thanks to the vision and generosity of the [Aushman Family Foundation](#), you're invited to become inspired and empowered by renowned experts in the fields of volunteer, resource, and organizational development. Whether you are a board member, executive, volunteer manager or marketing/development professional, this local, low-cost *Nonprofit Summit* will help build the capacity of your public or nonprofit organization.

Leaders from the Aushman Family Foundation, The Community Foundation of Frederick County and Volunteer Frederick have researched and recruited expert and engaging presenters and panelists for a truly catalyzing day that includes a keynote address by Ted Hart, CEO of Hart Philanthropic Services, 9 workshops, and lunch time affinity group discussions with local community leaders. You can't beat the price -- your nominal \$70 fee includes all this plus coffee and tea service as well as a catered lunch! And you won't have to travel to benefit from our impressive team of presenters -- it all takes place right here in Frederick at the Francis Scott Key Conference Center at the Frederick Holiday Inn.

We want your board members! The Aushman Family Foundation knows how critical effective board leadership is to the success of any organization. As a special incentive, staff members who bring a board member with them to the Summit receive a \$10 discount.

Co-coordinators Betsy Day, President of the Community Foundation, and J. Thomas Viall, Executive Director of Volunteer Frederick, honor the commitment of the Aushman Family Foundation to Frederick County's critical social infrastructure. Their support has made this Nonprofit Summit possible.



Summit sponsors: Marvin & Lisa Aushman, Aushman Family Foundation

FACILITIES & DIRECTIONS

Frederick Holiday Inn & Conference Center: This top rated Frederick MD hotel is located at the intersection of I-270 & Route 85 at the Francis Scott Key Mall.

Directions:

From Points East:

Take I-70 West, Exit 54. Follow signs to Route 85 South. Turn left at the entrance of the Francis Scott Key Mall.

From Points West:

Take I-70 East to I-270 South. Take Exit 31A. Turn right at the entrance of the Francis Scott Key Mall.

From Points North:

Take Route 15 South to I-270 South. Take Exit 31A. Turn right at the entrance to the Francis Scott Key Mall.

From Points South:

Take I-270 North. Take Exit 31A. Turn right at the entrance to the Francis Scott Key Mall.

OVERVIEW OF THE DAY



- 8:00 – 8:30 am:** Registration (Coffee & Tea Service)
- 8:30 - 9:00 am:** Introductions and Welcoming Remarks - Lisa Ausherman, Co-Founder, Ausherman Family Foundation
- 9:00 - 10:15 am:** **Keynote Speaker: Ted Hart, Hart Philanthropic Services**
***What's New in Fundraising:** What does the "new breed" of online giver want? What trends in online giving are important for you to know? The tools and techniques that will be shared with you can be put to work right away, right in your office the next day!*
- 10:15 - 10:30 am:** Break
- 10:30 - 11:45 am:** Concurrent Workshops: Nonprofit Management & Organizational Development (Track 1), Board & Volunteer Development (Track 2), Marketing & Resource Development (Track 3)
- 11:45 - 1:00 pm:** **Lunch Break**
Presentation from The Compass Group
Affinity Group Lunch Tables - Sample Topics: CEOs, board members, volunteer managers, fundraisers, nonprofits under 20 employees, nonprofits with no employees
- 1:00 - 2:15 pm:** Concurrent Workshops
- 2:15 - 2:30 pm:** Break
- 2:30 - 3:45 pm:** Concurrent Workshops

CONCURRENT WORKSHOPS

|  NONPROFIT MANAGEMENT & ORGANIZATIONAL DEVELOPMENT |  BOARD & VOLUNTEER DEVELOPMENT |  MARKETING & RESOURCE DEVELOPMENT |
|---|---|---|
| <p>10:30 - 11:45 am</p> <ul style="list-style-type: none"> ❖ The Investment Driven Model <i>Tom Ralser</i> | <p>10:30 - 11:45 am</p> <ul style="list-style-type: none"> ❖ Build a Power Board - Innovation & Change <i>Ted Hart</i> | <p>10:30 - 11:45 am</p> <ul style="list-style-type: none"> ❖ Branding Beyond the Logo <i>Larry Checco</i> |
| <p>1:00 - 2:15 pm</p> <ul style="list-style-type: none"> ❖ Threading the Strategic Plan Into All You Do - Part 1 <i>Fred Bartenstein</i> | <p>1:00 - 2:15 pm</p> <ul style="list-style-type: none"> ❖ The Partnership Between the Board & Executive Director <i>Michela Perrone</i> | <p>1:00 - 2:15 pm</p> <ul style="list-style-type: none"> ❖ The Perfect Ask <i>Robert L. Bull, Jr.</i> |
| <p>2:30 - 3:45 pm</p> <ul style="list-style-type: none"> ❖ Threading the Strategic Plan Into All You Do - Part 2 <i>Fred Bartenstein</i> | <p>2:30 - 3:45 pm</p> <ul style="list-style-type: none"> ❖ Doing More With Less: Unlocking the Potential of Skills Volunteering - <i>Theresa Moore</i> | <p>2:30 - 3:45 pm</p> <ul style="list-style-type: none"> ❖ Everyone Can Fundraise <i>Robert L. Bull, Jr.</i> |



WORKSHOP DESCRIPTIONS

NONPROFIT MANAGEMENT & ORGANIZATIONAL DEVELOPMENT (TRACK 1)

The Investment Driven Model - Tom Ralser

Demonstrating value can be the most powerful, yet often misunderstood tool in your funding toolbox. Today's nonprofit needs to use every tool available to ensure funding in a tight-money environment. This session explores why a slow economy need not be threatening, and how a strategy that incorporates Return on Investment (ROI) can not only strengthen your funding portfolio, but the nonprofit itself. Topics include: Investment Driven Model™ basics, why people and organizations invest in nonprofits, delivering outcomes that investors value, developing investable outcomes, misconceptions about ROI and its application, and diversifying your portfolio.

Threading The Strategic Plan Into All That You Do - Parts 1 & 2 - Fred Bartenstein

Fred Bartenstein will orient participants to the strategic planning process and clarify understanding of the concepts: stakeholders, environmental scan, SWOT (strengths/weaknesses/opportunities/threats) analysis, vision, mission, values, goals, and action plans. He will also discuss appropriate planning cycles, processes, and monitoring of progress; and address particular questions and concerns raised by workshop participants. He will share examples of documents produced by nonprofit organization clients in recent strategic planning processes.

BOARD & VOLUNTEER DEVELOPMENT (TRACK 2)

Build a Power Board - Innovation and Change - Ted Hart, ACFRE, ePMT

This presentation is recommended for all levels of board sophistication: a good "jump start" for boards that are reluctant to get involved in fund and donor development; a great management tool for those already involved. Best practices and references provided will help the participant develop a strategy to build a power board. This is a mindshifting workshop that can lead to much greater engagement from your boards.

The Partnership Between the Board and the Executive Director - Michela M. Perrone, Ph.D.

Fundamental to the success of a nonprofit organization is a strong partnership between the Executive Director and the Board. During this session participants will engage in analyzing the four essential elements of a successful partnership, which are: Common Expectations, Cooperative Planning, Shared Evaluation, and Effective Relationships. Workshop participants will work in small groups of Executive Directors and board members to determine each other's expectations and share partnership practices which have been successful for their organizations.

WORKSHOP DESCRIPTIONS



Doing More with Less: Unlocking the Potential of Skills Volunteering - Theresa Moore

Given the current economy, nonprofits can engage corporate support through non-cash efforts. "Skills Volunteering" is a unique and innovative approach building nonprofit sustainability using corporate human capital. It's a win-win: employees develop leadership skills while nonprofits benefit from increased operational efficiency. Learn how to initiate a Skills Volunteering project with corporate partners.

MARKETING & RESOURCE DEVELOPMENT (TRACK 3)

Branding Beyond the Logo - Larry Checco

This skills-building workshop is designed to demonstrate that branding is far less about logos, taglines and marketing, and far more about quality leadership and staff, accountable and ethical behavior, and an organization's willingness, ability and commitment to live up to whatever it says about itself. It offers cost-effective branding strategies that any organization, regardless of size or financial resources, can incorporate into its everyday business activities. Participants will come away with a better understanding of the importance and meaning of clearly defining, aggressively promoting, and diligently protecting their brands, as well as how a good, solid brand image has implications for everything from fundraising, board development and marketing to staff recruitment and retention. Finally, this workshop will set participants on the path to answering seminal brand questions about their programs or organizations, namely: who are we, what do we do, how do we do it, and, most importantly, why should anyone care?

The Perfect Ask - Robert L. Bull, Jr., CFRC

"The Perfect Ask" is a participatory workshop which explores tried and true strategies for soliciting face-to-face gifts. Using a linear approach to outline the process, workshop participants are provided with a checklist of solicitation considerations, from scheduling the meeting to closing the deal. Whether you are a newcomer to fundraising or a seasoned development professional, by the end of the workshop, you will not only build a comfort level for leading up to and delivering your own "Perfect Ask," but more importantly, you will understand why process is much more important than outcome!

Everyone Can Fundraise - Robert L. Bull, Jr., CFRC

"Everyone Can Fundraise" explores a team approach to fundraising as an intramural sport! Whether you have a small, a large, or no staff at all, this strategy welcomes players of all shapes and sizes - paying particular attention to staff and volunteers whose roles and responsibility may not be assigned to generate philanthropic revenue. If fundraising has been defined as your organization's highest priority, then all hands on deck! Let's learn how to build the most effective fundraising teams using the skill sets, talents, and resources within your own organizations.



PRESENTERS

Fred Bartenstein is President of Fred Bartenstein & Associates, LLC, an organizational development consulting firm based in Yellow Springs, Ohio. His clients include nonprofit, business, and government organizations addressing change in their external and internal environments. His work involves facilitation and mediation in a wide variety of settings. His firm recently facilitated a strategic planning process for The Community Foundation of Frederick County. Previously, Fred Bartenstein was CEO of a community foundation in Dayton, a 1,250-seat performing arts center, a large independent bookstore, and two magazines.



Robert J. Bull, Jr. has nearly 20 years of successful fundraising experience for nonprofit organizations, both as a development officer and as a consultant. His professional fundraising skills include major gift strategy development and solicitation, special events management, direct mail and phoneathon organization, volunteer leadership recruitment and development, and the "Art of the Perfect Ask!" Mr. Bull joined The Compass Group after a six-year career as a senior consultant with Ketchum, Inc. Throughout his career he has provided fundraising counsel to more than 100 nonprofit organizations including higher education, independent schools, environmental associations, arts organizations, healthcare systems, and human services organizations.

Larry Checco is President of Checco Communications and author of "Branding for Success: A Roadmap for Raising the Visibility and Value of Your Nonprofit Organization." Larry is a sought-after motivational speaker who conducts courses and workshops on branding nationwide. He is a faculty member of the NeighborWorks® Training Institute - an adjunct of Southern New Hampshire University - has been an advisor at the University of Maryland's Robert H. Smith School of Business Executive MBA program, and is an annual presenter at the Weinberg Foundation Fellowship Program, which provides leadership training to selected nonprofit executives throughout the State of Maryland. Larry has written dozens of articles on branding which appear on numerous organization websites, including GuideStar, the Kellogg Foundation, The Foundation Center and many others. He firmly believes that good branding principles are universal and apply to all organizations and companies, for-profit and not-for-profit, alike.



Ted Hart is considered one of the foremost experts in both online and traditional fundraising around the world. He is sought after internationally as an inspirational and practical speaker and consultant on topics related to nonprofit strategy and board/volunteer development both online and offline. He serves as CEO of Hart Philanthropic Services, an international consultancy to nonprofits and NGOs, providing serious solutions to nonprofit challenges both online and offline. He has inspired the creation of People to People Fundraising, a movement housed online at <http://www.p2pfundraising.org>. He is also Founder of the international ePhilanthropy Foundation, the global leader in providing training to charities for the ethical and efficient use of the Internet for philanthropic purposes through education and advocacy. Mr. Hart has also taken a leadership role in helping nonprofits become more green by founding the <http://www.greennonprofits.org> movement. Hart is author to several published articles, an editor and author of the books, "Major Donors - Finding Big Gifts In Your Database and Online," "Nonprofit Internet Strategies Best Practices for Marketing, Communications and Fundraising Success," "Fundraising On The Internet: The ePhilanthropy Foundation.Org's Guide To Success Online," a contributing author to "Achieving Excellence in Fund Raising - Second Edition," and his new book "People to People Fundraising: Social Networking and Web 2.0 for Charities." He has also served as an adjunct faculty member to the Master of Science in Fundraising Management program at Columbia University (NYC). Mr. Hart is an Eagle Scout with Bronze Palm.



PRESENTERS



Theresa Moore has been working in the field of Organization Development for over 19 years. She is currently the Director of Organization and Talent Development for Genworth Financial, with clients around the globe. Previously Theresa served as Senior Manager for Learning and Organizational Effectiveness at Capital One. Theresa has also worked in the public sector as a middle school and high school Spanish teacher. Theresa's passion for empowering people to transform themselves extends to her efforts in the community. Theresa serves on the Board of Directors for the READ Center (Reading and Education for Adult Development), a nonprofit adult literacy agency. She also engages in community relations at Genworth Financial. Theresa recently created "Skills Volunteering," Genworth's innovative approach to giving back. Theresa received her BA in Spanish from Mary Washington College in Fredericksburg, VA and her Masters in Organization Development from American University in Washington, DC. Theresa lives in Richmond, Virginia and enjoys yoga, running, hiking, and volunteering.



Dr. Michela Perrone is the President of MMP Associates, a consulting firm supporting the successful development of nonprofit organizations, their boards and chief executives. Dr. Perrone is a faculty member of Georgetown University's Center for Public and Nonprofit Leadership, a Senior Associate of BoardSource, and a consultant and trainer for the Center for Nonprofit Advancement in Washington DC. She works with hundreds of board members, organizations, and chief executives annually to support their development and increase their effectiveness. Dr. Perrone's experience and expertise enable her to be an effective teacher and facilitator, as well as a troubleshooter, a diagnostician of management and governance problems, a team builder and a problem solver, a competent trainer of boards and executive coach of CEOs. MMP Associates was established in 1993. From 1978 until 1993, Dr. Perrone was the President of the Lt. Joseph P. Kennedy Institute, a nonprofit corporation with headquarters in Washington D.C. Under her leadership, the Kennedy Institute grew from a small school for children with intellectual disabilities, with 25 staff and a yearly budget of \$400,000, to a multi-faceted organization where, in over 50 locations, 300 staff serve nearly one thousand children and adults with disabilities, with a budget of over \$8 million. Dr. Perrone trained hundreds of professionals in the USA and abroad in management skills and in the education of people with disabilities. Between 1969 and 1978, Dr. Perrone held positions of leadership for six educational and human service organizations in the United States and Europe. Throughout her career, Dr. Perrone has consulted with hundreds of organizations in the United States, Europe and Latin America. A native of Italy, she holds Italian and American citizenship. She first came to the United States on a Fulbright Scholarship, and completed her undergraduate work at Macalester College in 1969, and her graduate and doctoral work in 1979 at the Union Institute and University. Dr. Perrone speaks fluent Italian, English, Spanish, and French.



Tom Raiser has personally worked with nonprofits in 49 states on over 450 funding projects. His specialty of utilizing for-profit concepts and methods in the nonprofit world has helped nonprofits raise an estimated \$950 million. As former President of Capital Strategists Group and Founder of ROImetrix, Tom is a frequent and highly acclaimed speaker, and clients in every field of the nonprofit sector have benefitted from increased funding by using Tom's innovative techniques. The diversity of groups recognizing the effectiveness of his message range from Chambers of Commerce to religious organizations, from national museums to rural health networks, and from local youth organizations to international research institutes. He holds the Chartered Financial Analyst (CFA) designation, which provides the framework his *Investment-Driven Model™* of fundraising, and led to the development of the *Organizational Value Proposition™*, which is widely used by corporations, foundations, and individuals as confirmation that the nonprofits in which they invest are truly delivering outcomes with value. He holds a BS in Marketing from Illinois State University and an MS in Finance from the University of Utah. He is the author of *ROI for Nonprofits: The New Key to Sustainability*.



2010 NONPROFIT SUMMIT REGISTRATION FORM



Name: _____

Title: _____

Organization: _____

Address: _____

City/State/Zip: _____

Phone: (w) _____ (c) _____

Email: _____

Please indicate any special needs: _____

I am a ___ Staff Member ___ Board Member ___ Volunteer

FEE: \$70 per person

Fee includes coffee / tea service and lunch.

Registrations accepted on a first come first served basis.

Payment due by March 15 - Make checks payable and mail to:

The Community Foundation of Frederick County

312 East Church St.

Frederick, MD 21701

Incentive! \$10 discount for each nonprofit staff member accompanied by a registering board member! Please send both registrations together.

Board Member Name: _____

Breakout Workshop Preferences (YOU MUST ATTEND THE SELECTED WORKSHOPS)

| NONPROFIT MANAGEMENT & ORGANIZATIONAL DEVELOPMENT TRACK (1) | BOARD & VOLUNTEER DEVELOPMENT TRACK (2) | MARKETING & RESOURCE DEVELOPMENT TRACK (3) |
|--|---|--|
| <input type="checkbox"/> 10:30 - 11:45 The Investment Driven Model <i>Tom Ralser</i> | <input type="checkbox"/> 10:30 - 11:45 Build a Power Board - Innovation & Change <i>Ted Hart</i> | <input type="checkbox"/> 10:30 - 11:45 Branding Beyond the Logo <i>Larry Checco</i> |
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| <input type="checkbox"/> 2:30 - 3:45 Threading the Strategic Plan Into All You Do - Part 2 <i>Fred Bartenstein</i> | <input type="checkbox"/> 2:30 - 3:45 Doing More with Less - Unlocking the Potential of Skills Volunteering <i>Theresa moore</i> | <input type="checkbox"/> 2:30 - 3:45 Everyone Can Fundraise <i>Robert L. Bull, Jr.</i> |

SPACE IS LIMITED, PLEASE REGISTER EARLY. REGISTRATIONS MUST BE RECEIVED BY 5:00 PM MARCH 15.