

# 2017 AFP Arizona Statewide Conference - Program Overview



Presenting Sponsors:



	WEDNESDAY, JULY 19 Executive Leadership Day	THURSDAY, JULY 20 Statewide Conference Day 1	FRIDAY, JULY 21 Statewide Conference Day 2
7:00 AM		REGISTRATION OPENS AT 7:00AM	REGISTRATION OPENS AT 7:00AM
7:30 AM	REGISTRATION OPENS AT 7:30AM		
8:00 AM			
8:30 AM	Succession Planning and Transitional Leadership: When is an Interim Leader Right for Your Organization	<i>Breakfast Keynote</i> Nonprofits Contribute As Much as Retail and Construction to the Economy! How to Show Nonprofits in a New Light	<i>Breakfast Keynote</i> How to Apply Lessons of Political and Social Revolutions to Make Change Happen Inside Organizations
9:00 AM			
9:30 AM			
10:00 AM	BREAK		
10:30 AM	How to Create a Winning CEO-Board Partnership	<i>Breakout Session 1</i> • SEO 101: Maximizing Your Web Presence • Engaging in the Political Process • Gifts from Donor Advised Funds • Private Funders Do's and Don'ts	<i>Breakout Session 1</i> • What's Appening: Guide to Mobile Apps • Are you Ready to Capital Campaign? • Measuring Fundraising Effectiveness • Young Fundraising Leaders Panel
11:00 AM			
11:30 AM			
12:00 PM	LUNCH		
12:30 PM	Giving USA: The Annual Report on Philanthropy	<i>Lunch Keynote</i> Is Diversity a Dead End? How Doing Diversity Right Can Rock Your World!	<i>Lunch Keynote</i> Live FRESH: The Five Essentials to Being a Difference Maker and a Life Changer
1:00 PM			
1:30 PM			
2:00 PM		<i>Breakout Session 2</i> • Brand Consistency in Digital Marketing • How Studies Create Successful Capital Campaigns • Fundraising During Tough Times • Engaging Your Board in a Major Gift Campaign	<i>Breakout Session 2</i> • 50 Time and Stress Management Techniques • Face-to-Face with the State Legislature • Launch a Planned Giving Program in 20 Hrs/Wk • Driving Impact through Lean Innovation
2:30 PM			
3:00 PM		BREAK	
3:30 PM		<i>Breakout Session 3</i> • Corporate Funders Panel • Create an Annual Development Plan That Works • Why I Love Raising Money • Improve Stature with Your Boss, Board, Donors	
4:00 PM			
4:30 PM		BREAK	
5:00 PM			
5:30 PM		<i>Speed Dating Happy Hour</i> Mix and Mingle with our Exhibitors	
6:00 PM			
6:30 PM		BREAK	
7:00 PM			
7:30 PM		<i>Fundraiser: The Musical</i> World Premiere Event!	

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AGENDA:

8:30am – 10:00am

o **Succession Planning and Transitional Leadership: When is an Interim Leader Right for Your Organization**

Succession Plans are like Life Insurance for nonprofits, giving staff and Board some rules of the road to move forward in times of transition. Join this team of professionals who have served as Interim Directors for a special workshop where we'll identify key components of a Succession Plan, discuss the opportunities and challenges that leadership transitions present, and talk about the times when a Professional Interim Director can work for you. At the end, presenters will serve as a panel to field your questions.

Presenters: Evan Mendelson, Evan Mendelson Consulting; Diana Sheldon, Diana Sheldon Nonprofit Consulting; Jennifer Tersigni, CFRE, Raise the Bar Consulting

10:15am – 11:45am

o **How to Create a Winning CEO-Board Partnership**

Amid true-life tales of some Board/CEO challenges we didn't see coming... learn how to create an effective, win-win team with your board and CEO: set clear expectations, open channels of dialogue and build respect and trust. Your organization's health and sustainability depends on it. Ask tough questions, share your secrets of success, and come away with solid ideas to build a healthier leadership team.

Presenter: Deb Dale, CFRE, Smith & Dale Philanthropic Counsel

12:00pm – 1:30pm

o **Giving USA: The Annual Report on Philanthropy**

Packed with insightful data on the latest trends in fundraising, the Giving USA 2017: The Annual Report on Philanthropy will give you: Groundbreaking research on key fundraising metrics you need to know; insight into important changes in donor preferences and habits; and leading intelligence you need to plan and fundraise in the year ahead.

Presenter: Richard Tollefson, The Phoenix Philanthropy Group

Lunch will be provided.

AGENDA:

8:00am – 9:30am | Breakfast Keynote

○ **Nonprofits Contribute As Much as Retail and Construction to the Economy! How to Show Nonprofits in a New Light**

Using the eye-opening findings from the Arizona Nonprofits: Economic Power, Positive Impact report, Dr. Evans will share ways to use the report's key results to build a case for your organization and demonstrate the economic power of the nonprofit sector. A panel of nonprofit professionals will give examples of how they've used this data to leverage funding and impact.

Presenter: Anthony Evans, PhD, ASU Seidman Research Institute

Moderator: Kristen Merrifield, Alliance of Arizona Nonprofits

Panelists: Carrie Gustavson, Bisbee Mining and Historical Museum; Eric Schindler, Child & Family Resources; Wendy Erica Werden, Tucson Electric Power

10:00am – 11:15am | Breakout Session 1

○ **SEO 101, Easy Steps to Maximizing Your Web Presence**

Search Engine Optimization, how it impacts your organization, and how to amp up your web presence to improve your digital visibility. Industry experts share basic, proven ways to boost your online presence, through on-page optimization and other strategies.

Presenters: Laura Klein and Kyle Roof, High Voltage SEO

○ **Engaging in the Political Process: Why and How to Talk to Electeds**

Nonprofits need to have a presence and voice in the shaping of our local, state and national communities. Learn why having a working relationship with elected officials is an important responsibility in moving your mission forward, and exactly how best to accomplish it.

Moderator: Sam Richard, Protecting Arizona's Family Coalition

Panelists: State Senator Dave Bradley; Hon Linda Lopez, Former AZ State Senator; Hon Linda Lopez, Former AZ State Representative

○ **Gifts from Donor Advised Funds: What the Fund Development Professional Needs to Know**

More gifts than ever are flowing to nonprofits through donor advised funds (DAFs) from community foundations and organizations like Fidelity Charitable. Yet many development professionals don't understand how DAFs work. Learn the benefits to donors, how to appropriately recognize these gifts, and how to work closely with donors to set up DAFs.

Presenter: Clyde Kunz, Clyde Kunz & Associates

- **Private Funders: Dos and Don'ts and Philosophies on Philanthropy**

Learn from some of our most active private funders how and why they give, what they look for in applications, common mistakes made by development professionals, and how best to approach them.

Panelists: John C. Amoroso, David and Lura Lovell Foundation; Margaret Hepburn, Legacy Foundation Southeast Arizona

11:30am – 1:00pm | Lunch Keynote

- **Is Diversity a Dead End? How Doing Diversity Right Can Rock Your World!**

More than 50 years after the breakthrough passage of civil rights legislation that altered the landscape of inclusion and recognition in all major sectors of our nation, and hundreds if not thousands of “outreach” initiatives in the philanthropic world, where do we stand today in relation to cultural diversity as a measure of social and economic equality? Has the concept of “diversity” lost its meaning as a tool for social transformation? What does “diversity done wrong” look like? What bold and fresh approaches to Diversity goals can fundraising professionals, trustees, staff and executives of America’s not-for-profit sector embrace to move beyond clichés, fear, and tokenism?

Presenter: Maribel Alvarez, PhD, Associate Research Professor in the University of Arizona School of Anthropology, Associate Research Social Scientist at the University of Arizona Southwest Center, and Executive Program Director of the Southwest Folklife Alliance

1:30pm – 2:45pm | Breakout Session 2

- **Pay to Play! Investment and Brand Consistency in Digital Marketing**

Marketing your nonprofit in the digital age is important. Learn tips on social media, web-site development and on-line marketing for your nonprofit.

Presenter: Jenna Rutschman, Left of West

- **It's Not About Luck: How Studies Create Successful Capital Campaigns**

Would an architect build a home without a blueprint? Would you drive 10,000 miles to Tierra del Fuego with no road map? The Feasibility Study, or Pre-Campaign Marketing and Planning Study, is a critical part of your campaign. It's the first phase, and the blueprint for your campaign's success. Learn about the nuances, hard data, and benefits of the Pre-Campaign Study.

Presenters: Angie Smith and Deb Dale, CFRE, Smith & Dale Philanthropic Counsel

- **Fundraising During Tough Times**

In a challenging economy, people make tough decisions about where they spend their dollars. How do they make these decisions? How do economic realities and personal perceptions affect your organization? This interactive session will address economic realities for charities nationwide and locally, strategies to minimize or avoid these economic pressures, what to do (and please DON'T do) when a donor says, "I can't contribute now," and practical strategies for successful fundraising regardless of economic conditions.

Presenters: Alice Ferris, CFRE, ACFRE and Jim Anderson, CFRE, GoalBusters

- **How to Sell, Launch and Sustain a Major Gift Program with a Small Shop**

We all know major gift fundraising is a far higher ROI than most other fundraising. How can you do it with a small staff team? Whether your major gift is \$1,000 or \$50,000, you'll learn to overcome common barriers, influence your organizational culture, and effectively engage your board and volunteers to launch and sustain a Major Gift Program.

Presenter: Dawne Bell, CFRE, Women's Foundation of Southern Arizona

3:15pm – 4:30pm | Breakout Session 3

- **Corporate Funders: How, Why and To Whom They Give**

How you can best connect with corporations in your area and create lasting, impactful partnerships. Hear from corporate leaders about how they want to engage with nonprofits.

Moderator: Deb Dale, CFRE, Smith & Dale Philanthropic Counsel

Panelists: Glen Harris, Caterpillar Foundation; Lisa Lovallo, Cox Communications; Julia Strange, Tucson Medical Center

- **Create an Annual Development Plan That Works**

In this session, we'll introduce the key activities of your annual development plan, the importance of integration and segmentation, ways to measure ROI, and ways to right-size a plan for your size organization. You'll walk away with a Development Plan that's ready for use in your new fiscal year.

Presenter: Jennifer Tersigni, CFRE, Raise the Bar Consulting

- **Why I Love Raising Money – Stories From 29 Years of Doing It**

Most people don't understand why anyone would WANT to be a fundraiser. Join this fun session with great anecdotes, stories, and lessons about fundraising, and remember why we do this work. There will be discussion time and time to share YOUR favorite fundraising story.

Presenter: Pauline Hechler, CFRE, Hechler Nonprofit Consulting

- **Step Right Up! Improve Your Stature with Your Boss, Board and Donors**

Whether your audience is one person or one hundred people, incorporating a few performance tips and tricks will improve your credibility, help you command a room, and engage your donors. You'll learn to control your physicality and use it to strengthen your message, as well as gain tools to keep your nerves under control when heading into a big meeting or presentation.

Presenter: Hanna Miller, Alexander | Carrillo Consulting

## Evening Activities

- o 5:00pm – 6:30pm

### **Speed Dating Happy Hour**

Join us for Speed Dating Bingo, a funky photo booth, and more! This after-hours event will include time to chat with our conference exhibitors.

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- o 7:00pm – 8:00pm

### **Fundraiser: The Musical**

A hilarious new musical about a bright-eyed fundraiser's adventure down the 'rabbit-hole' into the world of Professional Fundraising. Written and Directed by Michael Martinez, Executive Director of Live Theatre Workshop.

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AGENDA:

8:00am – 9:30am | Breakfast Keynote

○ **How to Apply Lessons of Political and Social Revolutions to Make Change Happen Inside Organizations**

Making change happen in nonprofits requires that we balance our commitment to mission with a desire for consensus among multiple stakeholders. To be successful, we can't sell the need for change, we need to create demand for it. Savvy change architects leverage organizational traditions, key influencer connections, and the "power of the people" to create demand for change at all levels. Join us as Allison Vaillancourt shares how we can apply lessons from social and political movements to prepare our organizations for the future.

Presenter: Allison M. Vaillancourt, PhD, Vice President, Business Affairs & Human Resources and Professor of Practice, School of Government & Public Policy, University of Arizona

10:00am – 11:15am | Breakout Session 1

○ **What's Appening: The Busy Professional's Guide to Mobile Apps That Help You Win the Day**

With so many great mobile devices and new apps available every day, it can be confusing and time-consuming to experiment with which ones can really make your day more productive. Join the IT experts at Nextrio for "a day in the life" of a non-profit professional using a variety of tried and tested productivity apps.

Presenter: Cristie Street, Nextrio

○ **Are you Ready to Capital Campaign?**

If you are contemplating a campaign, this session will explore the elements of capital campaigns and the requisite steps in preparing to launch a successful capital campaign. Is your organization ready to campaign? No two campaigns are alike just as no two organizations are alike but there are similarities.

Presenter: Dana Dawson, CFRE, DevelopmentPLUS Fundraising Counsel

○ **Measuring Fundraising Effectiveness: A New Measurement Framework from AFP, BBB Wise Giving Alliance, BoardSource and GuideStar**

The most common measure of fundraising effectiveness – the so-called "cost of fundraising" – is outdated and inaccurate. It tells us only how much money we spend to raise a dollar. Now there's a new way, developed by leaders in the nonprofit sector who understand fundraising and what it takes for a nonprofit to succeed. Presented by Southern Arizona's only BoardSource certified governance trainers.

Presenters: Laura Alexander, CFRE and Jenny Carrillo, CFRE, Alexander | Carrillo Consulting

- **Learning from Young Fundraising Leaders: A Panel Discussion with Lessons and Advice from Emerging Professionals**

This panel will feature young professionals in senior development positions in discussion about workplace learning, the importance of mentorship, and how they invested in their own professional development to prepare for career advancement.

Moderator: Loren Bouchard, Banner Health Foundation

Panelists: Kristyn Conner, Youth On Their Own; B. Joseph Howell, Habitat for Humanity Tucson; Karla Robles, Be A Leader Foundation; Xavier Walker, NPH USA; Torrie Yerkovich, Make-A-Wish Arizona

11:30am – 1:00pm | Lunch Keynote

- **Live FRESH: The Five Essentials to being a Difference Maker and a Life Changer**

Productive Cultures are created by Difference Makers and Life Changers. To be a Difference Maker and a Life Changer, you must Live FRESH. FRESH is when you create positive experiences and environments where dreams flourish. FRESH is when you develop a culture where people stay Focused, Resourceful, Enthusiastic, Strong and Honest.

Presenter: Frank Kitchen, Fundraiser, Consultant and Motivational Speaker

1:30pm – 2:45pm | Breakout Session 2

- **Fifty Time & Stress Management Techniques**

Have you ever been overwhelmed by last minute rushes to meet deadlines, scheduled meetings at a time you had already reserved for another activity or attended meetings that achieved nothing? Do you have days that seem to slip by unproductively? These can lead to stress and lower levels of performance. In this course you'll learn 50 effective techniques to control the use of your most important resource - time.

Presenter: Allan Pressel, PowerSite123

- **Step-by-Step Face-to-Face with the State Legislature**

Whether someone is a member of an association, an employee of a business, a supporter of a nonprofit or interest group, or a constituent with something to say, Senators and Representatives want to hear from their constituents. Receive research-based guidance for scheduling, conducting, and following up after office meetings.

Presenter: David Martinez, St. Mary's Food Bank Alliance

- **How to Launch a Planned Giving Program in 20 Hours per Week or Less!**

Sue and Lee will share their experience of developing a formal Planned Giving Program Plan with the CEO and Board Committee, and implementing the Plan in 20 hours a week – and the success that followed.

Presenters: Sue Sirkus, CFRE, Philanthropy Consultant, and Lee Mayall, CFRE, Boys & Girls Clubs of Tucson



- **Driving Impact through Lean Innovation Principles: Empathy, Experimentation and Evidence**

Learn how other nonprofit organizations around the country are reviving their entrepreneurial spirit to move faster, act bolder, and drive deeper impact for their organizations. Find out how you can use the Lean Innovation principles of Empathy, Experiments, and Evidence in your work to help your organization vet opportunities, stay relevant, and increase its impact.

Presenter: Heather Hiscox, Moves the Needle

*Conference Presented By:*



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