7th ANNUAL NON-PROFIT MANAGEMENT CONFERENCE

Wednesday, April 18, 2012
8:00 a.m. – 3:00 p.m.

WELCOME – The **Troy Chamber of Commerce** and its **Non-Profit Network** would like to welcome you to the 7th Annual Nonprofit Management Conference, sponsored by **Flagstar Bank** and **Walsh College.** Today's breakout sessions are shown below. You may choose one seminar at each session time. You do not need to pre-register for your seminars. However, there are a limited number of seats in each classroom and some may fill up.

BREAKOUT SESSIONS – Each session will begin promptly at the scheduled time. Please allow enough time to get seated before it begins so as not to interrupt the speaker's presentation.

QUESTIONNAIRES – After each session you will be asked to complete a very brief questionnaire to evaluate the speaker's presentation. We welcome your comments and suggestions. Please turn in the questionnaires at the end of each session so we may improve our conference for next year. Also, included in your registration packet is an overall conference questionnaire. Please take a moment before leaving to complete this form. Your responses are collected and are used in the planning of next year's conference, so we value your input. And you could be a winner! Turning in your completed questionnaires will enter you in a drawing for a $50 VISA gift card!

EXPO - Throughout the day, the lobby area will showcase exhibitors who specialize in nonprofit products and services. Please take some time to walk through the expo and meet these exhibitors.

FOOD - A continental breakfast and lunch are included with registration. Lunch will be served at 11:45 in the conference room, next to the expo area.

CELL PHONES – Please remember to turn your cell phone off or to vibrate so you will not disturb the speaker's presentation.

DAY OF EVENT SCHEDULE:

8:00 - 9:00 a.m. Registration and Networking Hour. Continental breakfast and expo included.

9:00 - 10:15 a.m. and **10:30 - 11:45 a.m.** Morning Breakout Sessions [15 minutes between sessions]

11:45 a.m. - 12:45 p.m. Lunch and Program –

Keynote Speaker: **Phil Power, President, Center for Michigan**

1:00 – 3:00 p.m. Afternoon Breakout Sessions

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Flagstar Bank	WALSH COLLEGE	MORC "...celebrating life, freedom and independence in the community."	Corp! Michigan's Largest Business Magazine

Thank you for attending. Please remember to turn in your questionnaires before leaving to be eligible to win a $50 VISA gift card. You may FAX to the Chamber at 248-641-0545 after the event.

Speakers and Topics

SESSION I: 9-10:15 a.m. (Attendees may choose one from each session)

Nathaniel Warshay, ***Senior Grant Officer, Henry Ford Health System Office of Philanthropy***
"Post-Recession Grant Seeking: A New Paradigm or Just More Lemonade?"
The first decade of the 21st Century has brought about much change in understanding foundations, government, organizations and grant-seeking processes. From the innovations brought about by the internet to the retrenchment from the recession and a shift to "outcomes" and even "impact," funders have changed the landscape on which nonprofits must seek private funding. Government, the largest grantor of funds, also is changing with different initiatives and the potential end to the earmark.

This session will touch on several strategies for grant-funding:

- effective *and* creative funder search
- some proposal basics
- treating grant-making agents as major givers
- critical questions to consider in developing proposals
- stewardship in the cycle of giving
- political and competitive government grants

Please bring your anecdotes (boiled down to elevator speeches) and samples of an effective proposal and one that bombed. Either might have been funded or rejected, which is part of the story. (Please note that we will discuss our personal experiences with the expectation that all is confidential ***unless*** otherwise noted).

Andrew M. Capelli, ***Stewart Title Company***
"Marketing Nonprofits: Turning Social Media into Social Contagion"
You can use the Internet without the aid of teenagers. You have email, a smart phone, a web page and enthusiasm. So, why aren't new members or volunteers lining up to join your nonprofit? Why aren't the donations or grants rolling in? Why haven't more people heard of your organization? The answer may be you are not utilizing online social media to its best possible effect. If you're Internet-savvy, learn to be marketing-savvy. If you have marketing skills, learn how to use them in the context of social media. Learn how the web and mobile applications can spread your message, increase funds and raise awareness of your cause. Move your organization's brand from marketable to contagious!

James "Jay" Hawreluk, ***President, JH Group***
"Unraveling the Mystery of People"
Have you ever wondered why people do the things they do?
Have you ever met someone who just makes you scratch your head because you don't get them?
Are some relationships easy for you and others very difficult?

In this very educational and entertaining session, Jay explains how people are innately hardwired and how that hardwiring affects their behavior. Once you understand your own personal hardwiring and the hardwiring of others, relationships at work and home become better! Knowing yourself also leads to higher levels of job satisfaction and overall life enjoyment. In this interactive session, you will receive usable deliverables that will create an understanding of how people embrace ideas, actually communicate, how someone reacts to pressure and effective information exchange. A few deliverables attendees receive are: reduce team dysfunctions, improve communications, better relate to people in sales and internal influencing and ensuring information is properly delivered. Those attending will have the opportunity to complete a quick assessment AFTER the session to add enhanced value to their lives. Come prepared to better understand yourself, those around you, and have fun with this very dynamic session!

Michael Montgomery, ***Montgomery Consulting & Lawrence Technological University***
"Getting Your Board to Embrace Their Critical Role in Outreach, Advocacy and Fundraising"
This session is a "train the trainers" experience aimed at equipping attendees to more effectively engage their Boards in fundraising. It includes two modules. The first is an abbreviated role playing exercise in which attendees will be the Board of a hypothetical nonprofit organization and go through a board training/development exercise. The second module is a debrief of that hypothetical training session and exploration of options and strategies for overcoming the specific challenges attendees anticipate in more fully engaging their real world Boards in Outreach, Advocacy and Fundraising. Throughout, this session emphasizes that major donors increasingly expect to see 100% of Board members giving (and at a respectable level) to an organization before they will seriously consider making major new commitments. It is designed to equip attendees to deliver to their Boards a clarifying experience that helps members to see and understand that they truly do need to *give*, *get* or *get off* (the Board) in order to be helpful in this increasingly competitive fundraising environment.

Angeline Smith, ***Principal Accountant & Business Consultant, Angeline & Associates, LLC***
"Components of a Highly Effective Fund Development Plan"
Avoid performing haphazard and disjointed fundraising activities and learn to create a fund development plan based on strategic choices your organization must evaluate and make. The presenter will review components of a comprehensive planning process that will incorporate strategies for addressing financial needs that are specific to your organization's administrative and programmatic goals. Topics covered include:

- Setting Financial Goals
- Identifying Strategic Goals
- Choosing Solicitation Strategies
- Exploring Cultivation Strategies ("Making Friends")
- Establishing Timelines and Assigning Tasks for Effective Plan Implementation.

Pat Fuelling, ***Director in Charge of NFP Practice***
Laurie Horvath, ***Senior Manager, member of AICPA Not-for-Profit Expert Panel***
"Making Sense (Cents?) of Financial Statements"
This session will provide an overview of the importance of financial statements for non-profit organizations. It will focus on the benefits of strong financial reporting and will illustrate the story that financial statements can tell. You will understand what the users of your statements are looking for, and learn how your organization can use the financial statement process to work to your advantage, to attract donors, funders and partners. A relationship with auditors and bankers does not need to be a necessary evil. In fact, partnering with your CPA as a trusted professional advisor can help your organization thrive, create meaningful opportunities and allow dollars to be better focused on your mission.

SESSION II: 10:30-11:45 a.m. (Attendees may choose one from each session)

Darlene Thomas, ***The Leadership Group***
"Strengthening Fundraising Through Social Media"
The session is intended to guide development professionals in beginning or strengthening their digital marketing, (Facebook, Twitter, email, QR codes), to enhance their fund development plan. The session will educate participants on topics from the basics of online/digital marketing to best practices in traditional fundraising. Attendees will leave this session ready to begin or re-evaluate the connection between digital marketing and traditional fundraising.

Dr. Tamara Dindoffer, ***Spring Arbor University***
"Successful Leading Without Prozac"
This session is designed to be a dynamic interactive presentation that will discuss the core values that contribute to successful leadership. Also discussed will be specific keys towards successful leadership. It will help leaders to learn how to avoid being abused by colleagues and followers. Participants will also discuss the power of vision that leads toward growth and organizational sustainability.

Michael J. Hamblin, ***Attorney, Frank Haron Weiner***
"Avoid a Taxing Disaster: 10 Ways You Can Lose Your Nonprofit Status"
Obtaining federal tax-exempt status is no small feat. It involves complying with a number of federal laws and regulations and completing a significant amount of paperwork. Many folks breathe a sigh of relief once they get their tax-exempt acceptance letter from the IRS and prepare to cruise down "easy street." However, jumping through the hoops to become a tax-exempt nonprofit organization is just the beginning. It is important that nonprofits remain vigilant so they do not do anything that could jeopardize their tax-exempt status with the federal government. This presentation will highlight the 10 most common ways a nonprofit can jeopardize their tax-exempt status and the steps nonprofit staff members and officers can take to ensure compliance with federal tax law and avoid the disastrous consequences of losing tax-exempt status.

Deb Macon & Mary Kerwin, ***Trainers2Go***
"Put It In WRITING! - Tips & Tools to Create a VOLUNTEER HANDBOOK"
The VOLUNTEER HANDBOOK is the most critical tool to help facilitate successful engagement of every volunteer, whatever their role in an organization. In this highly interactive session, learn the information to include that will help assure win/win outcomes for the organization, paid staff and volunteers in all roles – hands on direct service, support & governance.

Mar Sclawy, ***Attorney*****, and Chris Bunch,** ***Six Rivers Regional Land Conservancy***
"Is this an offer you SHOULD refuse? (Thanks awfully, but…..)"
Executive Director Chris Bunch and Mar Sclawy, attorney and board member of Six Rivers Regional Land Conservancy share their experience and offer tips for nonprofits on acquiring real estate. The goal of the session is to help attendees avoid common mistakes when contemplating acquiring property, whether by purchase, donation, will bequest or other vehicle. Subjects will include environmental due diligence, property valuation, inspection; factoring operation, renovation and other costs, and other issues involved in acquiring and maintaining property. They'll also address when and how to say no thanks to well-intentioned supporters.

Diana Kern, ***Vice President, NEW***
"No Really… How to Get Your Board to Raise Money!"
This session is for Executive Directors, development staff and board chairs. It focuses on the board's role as Ambassadors first, fundraisers second and provides tools and processes to engage the board in revenue development. This session will provide real, practical ways to help our board members overcome their fear about fundraising. Participants will be presented with real stories of board member engagement and will leave with tools to help their boards embrace Ambassadorship of mission and fund development.

SESSION III: 1:00-3:00 p.m. (Attendees may choose one of the following 2 programs)
In our expanded afternoon sessions, we are offering the opportunity to take a deeper dive into your organization to bring about real opportunities for growth. You may choose to attend one of the following two-hour sessions:

Program #1 – Fund Development Strategies in the New Economy
This session explains the current financial climate that nonprofits must operate within and how to use that information to create a fundraising program that will ensure success.

Leon LaBrecque, JD, CPA, CFP, CFA, Financial Advisor, LJPR
"Reducing Uncertainty™ in Your Donors and Team"
In this session, we will talk about reducing the uncertainty that your donors are experiencing, to help you increase dollars coming into your non-profit. How will you educate your donors about this economy and the best ways in which they can give? As you handle funding coming in, what tools are available for you and your team based on the rapidly changing economy around you? There are specific financial topics your non-profit needs to pay attention to in order to best raise, keep, and manage funds. Leon LaBrecque, whose wealth management firm, LJPR, helps several national non-profits in their funding efforts, will present an Interesting Overview of the Economy, Markets and the Political Horizon for 2012 and tie that in with the needs of your current donors and team.

This session will provide an engaging and entertaining view of the world from the global level down to a local and personal level and help explain what financial topics your non-profit needs to pay attention to. We also explain the "new way of giving" that donors are using, and the secrets to why some non-profits are experiencing exponential growth through implementing concepts that create fans of their donors.

Shai James-Boyd, MPA, CFRE*, Director of Development & Marketing, Methodist Children's Home Society*
"Annual Giving: The Foundation for Raising Funds for Your Organization"
This workshop explores creating a culture of philanthropy at your organization which starts with the annual fund… the foundation of your fundraising activities. Topics covered include the **Case for Support**, **MOVES Management** and **your Development Plan.** This course will help you establish your annual fund and explore how all of the techniques work together to create a solid fundraising program. You will learn how to develop and connect strategies that most appeal to your donors.

Program #2 - Technology Roadmap – Get Your Nonprofit on Track For Success
This session will take a closer look at how to assess your technology needs to ensure you have what you need to accomplish your mission. Then, learn how to put technology to good use as you map out a social media plan.

Leon A. Wilson*, Director Highway T, Michigan Nonprofit Association*
"Nine Key Technology Concerns Nonprofit Management Must be Aware of to Ensure Effective Technology Decision Making"
As a nonprofit leader, technology decision making is a key component to your overall capacity building efforts. Knowing where and what to focus your attention on play an instrumental role in your technology budgeting and decision-making efforts. Not factoring key concerns might cause

one to create a counterproductive outcome. In this informative session, we will review some of the key elements that all nonprofit leaders ought to be informed about. We will go over technology management areas such as "finding the right IT consultant", "technology budgeting", "system integration", "measuring your IT ROI", "IT staffing", "optimizing IT staffing resources", "new technology/software consideration and selection making", "aligning your data needs with your technology", and "disaster recovery and planning." In each of these nine areas we will highlight the do's and don'ts and best practices from a managerial/leader perspective. By being educated on these important areas pertaining to your organization's technology environment you will be in a position to make more effective technology decisions.

Eric Vogel, ***Vogel Social Media***
"The Power of Social Media"
You can't listen to the radio or watch TV without hearing terms like Twitter, Facebook, or LinkedIn. CNN, Ashton Kutcher, Ellen Degeneres and even Oprah are on and talking about them. In every circle there are people who love social media and there are those who just don't get it. There are some who would only use it for socializing while others are fully on board and utilizing it for their business. In this session you will learn why it's important for a non-profit to be utilizing social media platforms. We will cover: What to share on your social networks, educating vs. selling, the importance of Facebook landing & reveal pages, fund raising through social media, and why it's important to share different medias on your social networks.

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