12th ANNUAL NONPROFIT MANAGEMENT CONFERENCE

Presented by PNC BANK

NON-PROFIT NETWORK

troy Chamber of Commerce

Thursday, May 18, 2017

Walsh College – Troy Campus
3838 Livernois, Troy, MI 48083
8:00 a.m. – 3:10 p.m.

WELCOME – The **Troy Chamber of Commerce** and its **Non-Profit Network** would like to welcome you to the **12th Annual Nonprofit Management Conference,** presented by **PNC Bank.** 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, we will showcase exhibitors who specialize in nonprofit products and services. Please take some time to walk through the expo and meet these exhibitors.

FOOD - Breakfast and lunch are included with registration. Lunch will be served beginning at 11:50 a.m.

CELL PHONES – Please turn your cell phone off or to vibrate so as not to disturb the speaker and other attendees.

DAY OF EVENT SCHEDULE:

8:00 - 9:00 a.m. Registration and networking; expo in progress throughout the day

9:00 - 9:30 a.m. Breakfast and keynote address
Morning Breakout Sessions [10 minutes between sessions]
9:40 – 10:40 a.m. and 10:50 – 11:50 a.m. Choose from 4 breakout sessions

11:50 a.m. - 12: 50 p.m. Lunch and networking
Afternoon Breakout Sessions
1:00 – 2:00 p.m. and 2:10 – 3:10 p.m. Choose from 4 breakout sessions

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Presenting Sponsor: PNC BANK

Venue Sponsor: WALSH COLLEGE

12th Annual Nonprofit Management Conference

Presented by:

Speakers and Topics

SESSION I: 9:40 - 10:40 a.m. (Attendees may choose one session)

"Corporate Governance Made Easy"
Larry E. Powe, Esq., Keller Thoma, PC, Counselors at Law

Most non-profits govern by the generosity of volunteers, gathered from a cross-section of businesses that have a relevant interest in the cause of the not-for-profit organization.

Typically, the compensated administrative staff has their focus upon the charitable or non-profit causes. Many times, the legal governance, led by a volunteer president or chair, can be neglected, inadvertently, hopefully, not intentionally, simply because it appears way down the list of priorities. Nevertheless, compliance with state and federal laws are mandatory to assure the viability of the organization's success, federal and state taxation insulations, compliance with fiduciary responsibilities under the law and personal indemnification of all volunteer officers and director/trustees. Like any other entity under the law, in exchange for allowing the charitable, non-taxable effort to continue, the governance of the non-profit organization must remain in compliance under federal and state laws. Putting a process in place, with a template of organizational requirements will help to eliminate such concerns.

"The Hub of the Wheel – Why Everything Revolves Around Your Website"
Chris Drouin, Ignite Marketing

Your website needs to engage people. It is the one place online that you have undivided attention to tell your story. It is where you can safely ask for donations, update volunteers, promote sponsors, events and information. 51% of all internet traffic is now done through mobile devices. How does this impact your SEO? How does this impact your donors, volunteers and constituents? There are easy ways to evaluate your site and your marketing to make sure that mailers, social media and events drive traffic to the place you can have the most impact.

Topics Include:
1. Best practices for an effective and user friendly web design.
2. On page, off page and local SEO. What are they? What does it mean for you?
3. How to make your website convert leads.
4. The hub of the wheel. How to leverage social media and search to drive donations.
5. Apps, responsive websites and mobile sites.

"Get Your Board to Help With Fundraising!"
Michelle Wooddell, PhD, CFRE

Your board wants to help with fundraising – but how can you engage them in a way that keeps everyone happy? In this workshop, you will learn techniques that you can use to keep board members working for your organization in a way that is both manageable and useful! Our discussion will include ideas about how to activate board members, strategies to ensure that board members feel comfortable in making the ask, and ways to work successfully with board members to get the job done!

“The Three E’s of Event Planning: Engage, Entertain & Extract”
Moe Moua, Infinity and Ovation Yacht Charters & Kate Mahanic, Continental Dining

Is your fundraising event declining in attendance and sponsorships? In this session you will learn how attract and retain event attendees and donors through the three E’s of fundraising event planning; Engage, Entertain and Extract. We’ll talk about elements to make your event unique and engaging, techniques to hold and entertain your guests’ attention, and how to get the most bang for your fundraising buck and extract funds from your donors. You’ll learn how to use the three “E’s” during the planning, execution and post event phases.

With a combination of over two decades of experience in fundraising event planning; Kate and Moe will bring their expertise on how to turn trends into dollars. Not only will you leave the session with a deeper knowledge of the three “E’s” but you will also receive tools and resources to help you with selecting unique venues, engaging entertainment & extracting sponsorship dollars.

SESSION II: 10:50 - 11:50 a.m. (Attendees may choose one)

“Diversity in Your Nonprofit? Pro Tips and Pitfalls”
Shamyle Dobbs, MSW, JD, Chief Program Officer, Michigan Community Resources
Ellen E. Hoeppner, Esq., Senior Attorney, Clark Hill

Nurturing and increasing diversity within your organization is a valuable goal which is likely to produce measurable benefits – it is also a goal that requires careful planning around organizational culture and employment law principles. Join Shamyle Dobbs, an expert in social justice, systemic issues facing communities of color, and community engagement, and Ellen Hoeppner, a senior attorney at Clark Hill specializing in employment law compliance and best practices, to discuss ways to effectively nurture diversity in your nonprofit. From identifying your existing strengths and weaknesses in this realm and engaging your board in the process to examining your internal documents and legal best practices and pitfalls, you will walk away from this session with the initial tools to tackle your goal.

“New Fundraising Trends to Compliment Traditional Methods”
Kelly Brault, Director of Annual Giving, Oakland University & Ann Fisher, Executive Director of Annual Giving and Advancement Systems, University of Detroit Mercy

In a time of changing technology and demographics, nonprofits must continue to innovate. In this session, we’ll discuss the changes taking place with technology and demographics, and how we can meet our donors where they are to continue to grow our overall fundraising efforts. We’ll talk about launching crowdfunding and maximizing its success. We’ll also focus on days of giving and our cross-institution giving challenge, the Oakland vs. Detroit Mercy Giving Challenge. Learn more about some of the other emerging trends like mobile giving, digital ads, integrated giving programs and new staffing structures.

“Making Headlines: Secrets to Successful Interviews with Journalists”
Mark Geary, Media Relations Manager, Beaumont Health

You’ve convinced a journalist to cover your event or organization. What you do next will determine how your organization is portrayed right now and affect your ability to secure future media coverage. If your spokesperson is dynamic, speaks clearly and uses plain language, the likelihood of getting featured again increases. However, if your spokesperson uses jargon, appears nervous or is rude, you could sabotage your chances of future coverage.

In this session, Beaumont Health Media Relations Manager and former TV news reporter Mark Geary will provide practical, easy to implement tips and advice to prepare leaders for media interviews. In addition, Mark will show real examples of successful interviews and talk about common mistakes people make that set up an interview to fail. Finally, we'll discuss what can go wrong if an interview is handled poorly by a public relations staff member.

"Develop a Strategic Plan That Results in Operational Action"
Steve Czerniak, Volunteer Consultant (Organization Development)

Using a structured strategic planning process can result in a goals-based plan of action. That plan of action sets a course through the planning period. This Strategic Planning process uses well-known tools and techniques to do the work. A planning team can actually enjoy the process and learn along the way (of course, only with a good, experienced facilitator). This presentation will describe a straight-forward process to achieve that outcome. Some of the topics to be covered include:

- Chartering the planning team
- Establishing governance - Mission, Vision, Values
- Scanning (or assessing) the external environment - Remote; Industry; Operating
- Identifying and prioritizing the challenges the environment presents
- Identify capabilities (existing and needed)
- Run best, worst, and most likely scenarios
- Set goals and objectives
- Develop an implementation plan
- Measure for success
- Communicate

Break for lunch and networking, 11:50 a.m. - 12:50 p.m.

SESSION III: 1:00 - 2:00 p.m. (Attendees may choose one)

"Can I Do That? Should I Do That? Do I Have To Do That? Legal Issues for Nonprofits"
Lisa Berden, Dorn Berden PLLC

This session will cover "hot topics" in the legal world affecting tax exempt organizations. These include effect of lobbying and political activity on exempt status; tax compliance (i.e., IRS filing requirements, employment classification); treatment of interns and volunteers; and other issues about which the board and/or staff need to be aware to keep the organization in compliance with federal and state charitable organization and nonprofit laws, as well as with generally applicable law.

"Will Donated or Leased Space Work Better for Your Nonprofit? Explore how to find both types of space weighing the pros and cons of both."
Lynn Drake, Compass Commercial, ITRA Global

Finding the right type of commercial space for a nonprofit is critical. Donated space often has a cost to it which we will explore. If the nonprofit needs to lease office, industrial or retail space it is critical to understand the costs associated with each type of space and how they will each affect the bottom line.

- Suggestions on how to uncover free commercial space
- Understanding the timelines to find space plus understanding how different types of commercial real estate is leased
- Using your nonprofits power to ask the landlord for special consideration
- Expiration dates, what they mean and why they are critical to your organization
- If you have a question on your current lease bring it and we can discuss

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"CRA Dollars…What Are They and How Can I Get Some?"
Jason L. Paulateer, PNC Community Development Banking – Michigan

In a time of continuous change in our world, it is important for fundraisers to have the tools and resources to continue along the path of sustainability in their programming and capital projects. In this session we unpack the Community Reinvestment Act and how it is used to assist nonprofit organizations working in low income communities. We will discuss the sources of capital designated for use for CRA purposes and how organizations should go about accessing this important tool used in redeveloping communities.

"Find Out How to Dramatically Improve Individual Donor Fundraising"
Michael Watson, Phoenix Innovate

Phoenix Innovate has created an innovative donor strategy called Authentic Marketing that's data-driven and sustainable. Learn some best practices that can significantly impact your organization's financial results. The interactive presentation will focus on:

- Improved Donor Type Insight
- Increased Retention
- Increased Lifetime Value

SESSION IV: 2:10 - 3:10 p.m. (Attendees may choose one)

"Your Online Fundraising Toolkit: Converting Prospects to Donors"
Vera Devera, Walsh College

Direct mail and face to face fundraising remain a large part of your fundraising plan, but you can't ignore raising money online! How can you make sure your online fundraising efforts meet your organization's overall year-end goals? Learn best practices for creating integrated campaigns across channels (email, direct mail, web, and social) that raise money and awareness for your cause. Specifically, we will address how to:

- Craft an email program that results in donations
- Grow your monthly sustainer program
- Use social media to complement your fundraising efforts
- Optimize your donation page

Vera Devera started her career in development, first at San Francisco Opera, where she managed the annual giving program and organization's first email fundraising effort. Since then, she's helped raise millions of dollars for national nonprofits including No Kid Hungry, CARE International, the NAACP, the Smithsonian's new National Museum of African American History and Culture, and the National Organization for Women. She's been at the forefront of the rapid growth of online fundraising since its early days and loves to talk about all things digital.

"Obtaining Event Sponsorship"
Ann Bruttell, Meeting Coordinators

The financial success of your event or program can depend entirely on corporate sponsor contributions. So, how do you retain your current sponsors and excite new companies to participate? Let's discuss the value your organization offers and discuss new marketing approaches. Bring samples of your sponsorship packages for discussion.

"Endowments – Bolster the Financial Stability of Your Organization for Today and Tomorrow"
Kyle McCauley, APMA®, and Managing Partner of City Center Financial, LLC

Building a donor base for any non-profit organization is hard work and necessary for survival. Diversifying the ways in which your organization can accept donations shows donors that your organization has long-term vision and a mindset that will increase their comfort in knowing that the money that they donate isn't just making a difference today, but for years to come as well. You will leave this presentation equipped with the knowledge and tools to integrate or improve an endowment plan for your organization.

- What is an Endowment Fund?
- 4 Item Checklist to Start an Endowment Fund
- Common Pitfalls of Endowment Funds and how to avoid them.
- The Simplest Way to Begin – Deferred Gifts
- Tax Considerations

Thank You to the Nonprofit Management Conference Sponsors, Speakers, Vendors & Attendees!

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