14th Annual Nonprofit Management Conference

Speakers and Topics

SESSION I: 9:10 - 10:20 a.m. (Attendees may choose one)

"Fundraising Success by the Numbers – Part I: KPI for Individual Giving" **Room 203**
Michael Montgomery, Montgomery Consulting

Which numbers -- which *Key Performance Indicators* (KPI) -- do savvy fundraisers monitor and use to increase their organization's fundraising from individual donors? The goal of this session is to give all attendees a new management tool they can use to improve the effectiveness and efficiency of their organization's fundraising. This first session introduces attendees to KPIs as a management tool and exposes them to potential KPIs with which to monitor and improve their organizations' performance at each step of the fundraising process. Specific KPIs are suggested for broad-base fundraising using electronic tools and direct mail as well as for face-to-face solicitation at higher giving levels. Two ways of using KPIs will be considered. The first uses an organization's own past performance to establish baseline performance. The second uses target values derived from fundraising research including *Giving USA*, *Fundraising Effectiveness Project*, and the *Michigan Fundraising Climate Survey*.

"Practical Approach to Volunteer Engagement: How to Make it Easy and Rewarding" **Room 202**
Linda Braun, Business consultants for Non-Profits

Whatever their mission or size, all nonprofit organizations should establish policies and procedures to assure that 1) boards and officers understand their fiduciary responsibilities, 2) assets are managed properly, and 3) the charitable purposes of the organization are carried out. Failure to meet these three obligations is a breach of fiduciary duty and can result in financial and other liability for the board of directors and the officers.

Internal controls are policies and procedures that protect the assets of an organization, create reliable financial reporting, promote compliance with laws and regulations, and facilitate effective and efficient operations. They relate to accounting, to reporting, and to the organization's communication processes. A lack of internal controls is a gateway to fraud. Fraud schemes include, but are not limited to skimming cash, purchasing schemes, and financial statement fraud. Three very different types of fraud that nonprofits must prevent, detect, and insure against.

"How to ROCK on LinkedIn for Your Non-Profit in Just 15 Minutes a Day" **Room 201**
Brenda Meller, Meller Marketing

You know that LinkedIn is the #1 site for professional networking, but how do you make it work to market your non-profit? Attend and learn:

- Techniques for maximizing your non-profit brand on LinkedIn in just 15 minutes a day
- Ways to engage your team, your board, and your community to AMPLIFY your presence on LinkedIn
- Hands-on instruction using your smart-phone.
- The importance of your company page and how it can be a lead referral source for volunteers and donors
- All this and MUCH MORE!

Presented by Brenda Meller of Meller Marketing: www.linkedin.com/in/brendameller, an experienced non-profit marketer who loves PIE and jigsaw puzzles.

"Creating and Delivering a Compelling Pitch" **Room 205**
Barbara Boldt, Barbara Boldt Global Communications

As a non-profit leader, pitching is likely something you have to do frequently, maybe even daily. Are you satisfied with your pitch? Are you bored with your pitch? Is it getting the results you need? When you think about it, pitching is quite challenging. You have maybe as little at 3-5 minutes in which to convey pertinent information AND compel people to take action (usually donating money!). That is not easy to do!

In this interactive workshop we will look at what compels people to take action, both from the perspective of content and how a pitch is delivered. By the end of this workshop, you will be able to:

- Define the essential components of an effective pitch
- Tell a story about your non-profit that will move people to take action
- Identify your strengths and weaknesses as a presenter
- Employ delivery techniques that will increase the impact of your pitch

Feel free to bring the pitch you are using now to use as a starting point.

SESSION II: 10:30 - 11:40 a.m. (Attendees may choose one)

"Fundraising Success by the Numbers – Part II: KPI for Seeking Foundation, Corporate, or Government Resources" **Room 203**
Michael Montgomery, Montgomery Consulting

Which numbers -- which *Key Performance Indicators* (KPI) -- do savvy fundraisers monitor to improve their organizations' fundraising performance with institutional funders? The goal of this session is to give all attendees a new management tool they can use to improve the effectiveness and efficiency of their organization's fundraising. This second session focuses on a few KPIs that nonprofit leaders can use to improve their performance with Foundation, Corporate, and Government sources at each step of the fundraising process. If we have some new people joining us at this point, we will briefly review the KPI concept before taking a deeper dive into its use with institutional funders. The primary emphasis in this session will be on using an organization's own past performance as a baseline against which progress can then be measured.

"Don't Fear the Peacocks – Embracing Organization Change Through Diversity" **Room 206**
Tina Marie Wohlfield, TIMAWO

Every organization needs penguins (those who embrace tradition, culture and stability) and peacocks (those who thrive on change, innovation, ideas and alternative solutions to how we've always done it.)

Diversity of ideas fosters collaboration which often results in enhancing traditions not erasing them. In this session, Tina Marie will share her personal Human Resources journey on how watching organizations struggle with a fear of peacocks (and desire to change them) is a call to action to challenge the way the organization engages diversity and inclusion.

Session Objectives:

- Explore the roots and myths of diversity and inclusion in today's organizational climate.
- Are you a Peacock, Penguin, Pidgeon or Ostrich? Learn how the organizational peacock became an endangered species and why every bird is important for the organization to thrive.
- Identify ways and actions in which organizations can leverage collaboration and ideation to enhance inclusion (and foster positive change).

"Succession Planning: Ready or Not?" **Room 207**
Linda Braun, Business Consultants for Non-Profits

According to the National Council of Nonprofits, "Nonprofits that are serious about their own sustainability will also be serious about planning for smooth and thoughtful transitions of leadership." But what if you have an unwilling CEO or ED? Or what if management is changing faster than you expected? Building bench strength can act as a work-around to more formal executive leadership succession planning efforts. This session will take you through a local case study, showing you how you too can prepare for inevitable succession.

"The Power of Social-Emotional Intelligence" **Room 201**
Keith Levick, Goren & Associates

Social-Emotional intelligence (SEI) is defined as the ability to build and maintain positive relationships via managing emotions, trusting "gut" feelings, being aware of non-verbal communication, and to empathically connect with people. Research has shown that Emotional Intelligence contributes more to a person's success in life than does traditional intelligence (IQ). People with high SEI are the ones who make the best decisions, manage people more effectively, and contribute to the overall success of an organization. This workshop focuses on skills that strengthen people's SEI.

The program offers participants the opportunity to:

- ✓ Define social-emotional intelligence (SEI)
- ✓ Recognize the role SEI has in the workplace
- ✓ Identify the SEI Model
- ✓ Strengthen self-awareness
- ✓ Develop a technique to manage emotions
- ✓ Enhance social and empathy skills

Break for lunch and networking, 11:40 a.m. - 12:50 p.m.

SESSION III: 1:00 - 2:10 p.m. (Attendees may choose one)

"Hidden Figures: Researching and Evaluating Your Next Fundraising Source" **Room 204**
Henry C. Lau, The Core Focus

Fundraising is the next item on your agenda and now you're facing some hard questions. Where/how do we find new potential donors? When asking, how much is the right amount? How do we know if we have enough potential sources to fund what we need?

In this session, we'll focus on the science of fundraising by discussing strategies and research techniques that can identify potential funders, analyze and measure their potential giving, gain the information that can help you successfully make connections, and strategically plan your next steps. In our discussion, we'll also review information sources of public and private data, tools such as data-scrapers, techniques such as IRS-based net worth estimates, and service providers that offer advanced resources such as wealth screening and predictive modeling.

"Employee Relations: Creating a Culture of R-E-S-P-E-C-T" **Room 202**
Wanda Stallworth, The Leadership Group

If you ask anyone in your workplace what treatment they most want from management and peers alike, they will likely top their list with a desire to work within a corporate culture that treats others with dignity and respect. Respect is when you feel admiration and deep regard for an individual. You believe that the person is worthy of your regard and admiration because of the good qualities and capabilities that they bring to workplace. However, leaders must also be aware of the key warning signs of workplace toxicity and how to fix it. An effective leader models the desired behaviors and reveals corporate values in action. For the effective leader, their leadership shadow matches the message.

A leader doesn't just get the message across; he is the message. **– Warren Bennis**

Key Understandings:

- Shaping Culture for the Organization
- Keeping It Positive in the Workplace
- R-E-S-P-E-C-T is a Two-Way Street
- The Shadow of the Leader

"Annual Campaigns. Using Direct Mail, Social Media and Email Blasts to Raise Money" **Room 203**
Chris Drouin, IGNITE Media Group

Followers become 1st time donors. 1st time donors become renewals. Renewals become major gift prospects. Major givers become legacy donation prospects. How you can use your social media accounts and audience to build your annual fund, your major gifts and your legacy donations.

8 steps for long term success.

1. Ask donors which platform they prefer
2. Never forget that direct mail and email blasts still work
3. Develop and promote your brand via fundraising-specific accounts
4. Your development team needs to be the face of the ask
5. Expect engagement first, then gifts
6. Post early, post often
7. Hashtag it
8. Every post does not need a call to action, but every post has to have a link to a call to action

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"Doing More Good with Less Stress" **Room 205**
Tiffany Kruczek, Business Evolution Group

Good intentions will only take you so far in the world of non-profits. It is becoming increasingly important to approach your organization with more than *heart*. In this talk, Tiffany Kruczek, a proven team builder and entrepreneur, will deliver a powerful, inspirational presentation introducing you and your team to EOS, a universal system for developing your vision, gaining traction and becoming a cohesive, functional, healthy team. The session will cover the six key components of a successful organization and participants will leave will tools they can implement IMMEDIATELY. With Tiffany and the help of EOS, you can do more of the good you want to see in the world, with less stress and more success.

SESSION IV: 2:20 - 3:30 p.m. (Attendees may choose one)

"Activities Affecting Exemption & Taxable Activities of Charitable Organizations" **Room 206**
Lisa Berden, Linchpin Legal

A charitable organization can engage in some activity outside its exempt purpose without affecting its tax-exempt status, but it may have to pay tax on income generated from that activity. Some activities are (mostly) forbidden. What kind of activity might result in unrelated business income tax? What types of activity could result in loss of exempt status? What does "lobbying" mean? Is my organization precluded from doing ANY lobbying? What if there is a ballot issue integral to our organization? What is NOT considered lobbying?

"Board and Executive Relationships – Who's in Charge Here?" **Room 201**
Emma A. Powell, Central Michigan University

Board of Directors and Executive Directors balance a real and perceived shared authority over the organization. Additionally, their role as the "face" for the work of the mission is undeniable. Understanding this dichotomy, as well as being clear about expectations, best practices, and strengthening both the executive leader and board members is critical to organizational success. Considering board terms and/or staff turnover we can see how understanding, creating, implementing, and evaluating the organization's leadership culture is the genesis of success.

In this facilitation we will share some common themes that organizations often perpetuate; some examples are "*My board doesn't understand*" or "*our ED is never in the office*." These are real examples of the misunderstandings that can happen between both leadership entities. While executive-centrality is obvious it is the burden of the board to act as the fiduciary authority of the organization. We will discuss the roles and separation of powers in this session. The goal of the session is to lift the veil of uncertainties and provide a space to think and discuss concerns in the areas of leadership development in an effort to promote organizational triumph.

"Maximize Your Next Event: Corporate Sponsorships, Volunteer Management, Trending Event Ideas to Boost Proceeds, and Post-Event Stewardship" **Room 204**
Natalie Reilly-Finch, Ascension Providence Foundation

Is your nonprofit looking to add a new fundraiser? Reimagine an existing event? Capture corporate philanthropy dollars? Do you have multiple events that compete with one another? During this session you will learn how to find new and upgrade current sponsors, customize sponsorship levels, and maximize corporate relationships through underwriting opportunities. We will also cover best practices for managing your event committee, volunteers and staff as stewards of your mission at each event.

When was the last time you assessed your current event to make room for new, innovative and trending event ideas that are bringing in increased proceeds for other nonprofits? We will review the best event revenue generators and discuss the return on investment for popular event tactics such as raffles, silent auctions, and more. What to do when the event is over? Let's wrap up by discussing post-event stewardship to turn your event attendees into long-standing major donors.

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