

NPD 2020 Full Schedule of the Day Session Details

9:45 AM SESSIONS

Session 1

The SECURE Act: Understanding the significance of this IRA legislation passed in December of 2019 and the opportunities it presents for strategic charitable giving with Laura Eldridge, CFRE, Director Planned Giving, Foundations of Nuvance Health and Candice Pope - Financial Advisor, Financial Fiduciam

Session Description: Distinguish yourself as a sophisticated professional with knowledge that can help your donors' philanthropic decisions. Join co-presenters, Candice Pope, financial advisor with Fiduciam Financial, a private wealth advisory practice of Ameriprise Financial Services, LLC. and Laura Eldridge, Director of Planned Giving Foundations of Nuvance Health as they discuss the impact of the SECURE Act on IRA beneficiaries, tax liability to heirs and charitable strategies to replace wealth and give to your organization.

Session 2

Strategic Planning with Steve Jakab, CFRE, Bridgeport Hospital Foundation and Larry Raff, President, Copley Raff, Inc.

Session Description: Often, advancement shops are working hard, making friends and making money, but are doing so without a plan. There has not been time but you know you need one. This presentation helps advancement officers to make the case to leadership to spend the money and time to create strategic advancement operating plan.

LEARNING OBJECTIVES

To fully understand the elements of a strategic advancement operation plan.

To develop arguments to leadership to undertake the planning process.

To be prepared to address objections and common questions from leaders.

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Session 3

Community Philanthropy in a Public Health Crisis: Observations and Lessons Learned with Karen Brown, V.P. Development and Philanthropic Services, Fairfield County's Community Foundation

Session Description: This workshop will share observations and lessons learned about community philanthropy during a public health crisis. Specifically, Karen R. Brown, MPA (Vice President of Development and Philanthropic Services at Fairfield County's Community Foundation) will share specific observations and lessons learned from the Community Foundation's recent experience launching our COVID-19 Resiliency Fund in mid-March 2020. Content will focus on the local landscape of community philanthropy in Fairfield County, donor behavior (individual, institutional and corporate), and trends in community philanthropy. Come prepared to dialogue with Karen about her observations and discuss how as a region we can further strengthen our response to future emergencies.

Session 4

Go See People! Increase your fundraising program with Joseph Tumolo, CAP, Gift Planning Development

Session Description:

What is the challenge?

We do not spend enough time visiting with donors. We often lack process in the way we manage our relationships. Donors are more "demanding" and less trusting. So many non-profits competing for the same charitable dollars.

What is the Impact?

We are not raising as much money as we could. We waste time on activities that produce very little return. Donor attrition. More stress in our lives. *We have less of an impact on the people we serve.

How do we fix it?

Be very intentional and mindful of how we spend our time. Make better choices. Think bigger! Develop a process for everything we do. Continually hone our communication skills. Leverage our relationships.

The Result

More and happier donors. Measurable increase in gifts in the door. We are more fulfilled in our work. We stop working so hard and so many hours. Less employee turnover. Stronger impact on the people we serve.

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11:00 AM SESSIONS

Session 1

You Can't Finish What You Don't Start – Simple Ways to Launch Your Planned Giving Program with Laura Eldridge, CFRE, Director Planned Giving, Foundations of Nuvance Health

Session Description: Do you wear multiple hats? Come from a small shop? Are being asked to increase ability to raise funds without an increase in staff or budget? Learn some effective tips and tricks that you can easily implement in your existing program to build awareness of bequest intentions to your organization, create a legacy society, and increase your opportunity to engage donors in planned giving conversations.

Session 2

Creating a Culture of Philanthropy with Holly Doherty-Lemoine, CFRE, Executive Director, Foundations in Education

Session Description: What is your organization's culture? Fundraising is a shared mission and best executed when EVERYONE is knowledgeable and engaged.

Join with fellow professionals to learn why a Culture of Philanthropy is crucial in today's fundraising landscape and how you can help your organization achieve an environment that reflects a rich "Culture of Philanthropy."

Session 3

Maximizing Your Social Media with John Grosso, Director of Digital Media, Diocese of Bridgeport

Session Description: Navigating today's digital landscape is essential for every organization, and central to that is maximizing your social media use. In this session, we'll explore best practices, industry trends, and equip you with helpful tools to make social media accessible and useful for your company.

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12:15 PM SESSIONS

Session 1

Data Mining to Build Relationships with your Donors with Kenn Devane, President and CEO, Mine Tech, Inc

Session Description: Most donor relationships are one dimensional...they give or they don't. This session will explain new ways to find out who your best prospects are, where they are, how to best reach them and what to ask them for. In short, no more guessing!

Session 2

A Conversation on Best Practices for Board Leadership with Paul J. Sutera, CFRE, Senior Vice President for Advancement & External Affairs, Iona College, and Andy Dolce, Founder and Chairman Emeritus of Dolce Hotels and Resorts

Session Description: A Conversation on Best Practices for Board Leadership
This session will be conducted in an interactive format where topics will range from characteristics of strong Boards to real-world challenges of non-profits. Recruiting and engaging diverse board members. Clarifying expectations and equipping members to fulfill responsibilities. Developing a vibrant committee and task force structure to make the most of volunteer time, talent, and treasure. Be ready with your own questions that have not been answered in the hopes that Paul and your colleagues in the session have some thoughts and insight to share.

Session 3

How to Partner with Community Foundations with Sharon Closius, President & CEO, Valley Community Foundation

Session Description: There is more to Community Foundations than donor advised funds. Community Foundations may be able to assist you in securing a large permanent gift for your organization.

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Session 4

A Path Forward, Managing your Fundraising Career with Jim Pattison, Consultant, RG175, Sr. Giving Officer, Harvard Westlake School

Session Description: The COVID pandemic and issues of social injustice has brought with it a landscape of increased anxiety, financial stress and uncertainty. For some, it has meant losing their jobs or talented colleagues. For all, it has presented unprecedented challenges. What to do? Look for another position? Stay where you are? What does the present environment look like in advancement? Sort through some of the knotty issues and take away some practical tips with an experienced advancement practitioner and recruitment specialist, Jim Pattison.