AFP Audioconferences 2010

In partnership with Middlesex County Community Foundation (MCCF), Middletown, CT

To be held at the MCCF offices

All audioconferences are held from 1 – 2:30 p.m.

Wednesday, June 9

50 Asks in 50 Weeks: How to Jumpstart Your Small Development Office

50 Asks in 50 Weeks is a "back to the basics" concept for executive directors and development directors who want to raise more money for their organizations. It specifically targets non-profit organizations with small development offices (0-3 paid staff members,) and provides clear steps on how to create a simple plan for raising more money. Most development directors are so busy doing day to day tasks of fundraising, including writing thank you notes, grant reports and newsletters; managing databases; creating budgets; and more, they don't have time or forget the most important thing – asking! This session will help participants create a development plan which ensures a diverse funding stream, a system for asking for gifts in smarter, more efficient ways, and ensuring they ask for gifts all year long. Brief discussions on event planning, grant writing, individual solicitations and direct mail will be included.

Target Audience: Entry Level and Mid Level

About the Presenter: Amy M. Eisenstein, MPA, CFRE is the Principal and Owner of Tri Point Resources, a full service consulting firm for non-profit organizations and foundations. Before creating Tri Point Resources, Amy served for more than ten years in the non-profit sector as a director of development in large and small non-profit organizations, including the New Jersey Institute for Social Justice, the Associate Alumnae of Douglass College at Rutgers University, and Shelter Our Sisters, a battered women's shelter. For these organizations, she raised millions of dollars through event planning, grant writing, capital campaigns, direct mail and major and planned gifts. Amy currently serves on the board of the Association of Fundraising Professionals – New Jersey Chapter. She received her Master's Degree in Public Administration and Non-Profit Management from the Wagner Graduate School at NYU and her Bachelor's Degree from Douglass College at Rutgers University.

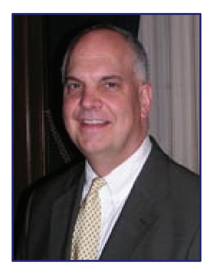
Wednesday, July 14

Legacy Giving Building Blocks: a Simple Approach to Attracting Long-term Support

Do you worry that your organization will miss out on the intergenerational transfer of wealth? Are you wrestling with how to build your organization's capacity to attract legacy and endowment gifts? Do you feel overwhelmed by planned giving techno-babble? Would you benefit from straightforward strategies to engage prospects? Join Caleb B. Rick, JD and Greg Lassonde, CFRE for this webinar on simple steps you can take to develop a strong foundation for your legacy-giving program.

Target Audience: All audiences will benefit from learning how legacy giving is essential to creating long-term mission sustainability.

About the Presenters: Caleb B. Rick, JD, is the founder of Legacy Giving, an adjunct professor of nonprofit Management at Vermont Law School and a nationally known proponent of donor-centered, outcomes based planned giving. He has counseled hundreds of charity leaders on legacy and endowment giving, and spoken at dozens of conferences over his twenty-year career.



Greg Lassonde, CFRE, is a co-founder of Legacy Giving, and runs a planned giving consulting practice in the San Francisco Bay Area where he is a frequent presenter on building a significant legacy program on as little as 5% of your time. His nearly three decades of fund development work includes a wide variety of nonprofits agencies. He founded the Basics Course on Planned Giving 11 years ago through the Northern California Planned Giving Council.

Tuesday, July 27

Developing a Planned Giving Marketing Plan

Brochures, mailings, the Internet…all techniques you use to market your planned giving program. But what about those qualified prospects who stay just below your radar? Are you proactively identifying planned giving prospects from analyzing annual giving behaviors; using wealth and planned giving scoring models; and using segmentation strategies? In this session, you will learn how to develop an integrated planned giving marketing plan that will help you increase gift income and improve your overall program performance.

Target Audience: Mid-level (3 to 6 years) and senior level (7 to 9 years)

About the Presenter: Timothy D. Logan, ACFRE is Vice President and Senior Consultant of Planned Giving Services and Nonprofit Healthcare Services for RuffaloCODY. Tim has worked in both the for-profit and nonprofit sectors and has over 29 years' experience in fund raising, nonprofit management and direct response marketing. In addition to holding the ACFRE credential, he holds a Masters of Nonprofit Management (MNO) degree. Tim's background in the nonprofit sector includes 17 years' experience at the local and national levels. Tim has been a local Executive Director for the Muscular Dystrophy Association, in Harrisburg, PA and for the Leukemia Society of America in Cleveland, OH. Nationally, he was a fund raising consultant for American Diabetes Association and the American Heart Association. He has served as Director of Development Services with Epilepsy Foundation was Director of Individual Giving at USO World Headquarters, and most recently served as the Senior Director of Development for the National Osteoporosis Foundation. His 14 years of Planned Giving experience includes working with advisors, developing donor relationships, and designing effective planned gift marketing and communication strategies. Tim has also spent 12 years as a direct response fund raising consultant. In addition to managing multi-million dollar direct response programs, he has been a leader in developing innovative direct response programs targeted to major and planned giving donors. Tim is past president of the Mandel Center Alumni Association at Case Western Reserve University. He is a past board member of AFP, Greater DC chapter, and a past member of the AFP National Professional Education committee. Tim is a member of the National Capital Gift Planning Council in Washington, DC. He is active in the Direct Marketing Association Nonprofit Council. An AFP certified instructor, he is a seasoned lecturer and author on fundraising and nonprofit management.

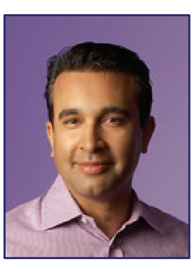
Thursday, September 23

Power Shift: Secrets to Success in the Digital Age

In today's digital world, it's critical to reach your donors and prospects where they are spending their time — online. With the past 50 years of fundraising behind us, what's next? With the current economic conditions and increased competition for donor dollars, cost-effective methods for sourcing new prospects, converting them to donors, and maximizing their lifetime value is more important than ever. Research into the habits of major donors and general consumers alike continues to show a growing propensity for online giving and engagement. This webinar will discuss the strategic changes and investments required for nonprofits to succeed online, best practices for adapting to a world where the power has shifted to donors, and real-world examples of successful multi-channel marketing strategies.

Target Audience: Mid Level 3-6 years to Senior Level 7-9 years

About the Presenter: Vinay Bhagat founded Convio in April 1999 after volunteering at a public television pledge drive and being struck by the opportunity to leverage Internet technology to drive better fundraising results. Today, as chief strategy officer, Vinay oversees corporate strategy development and client success services. A frequent speaker at conferences hosted by AFP, DMANF, CASE and others, Vinay also is a widely published author, with articles appearing regularly in DM News, Journal of the Direct Marketing Association Nonprofit Federation and on OnPhilanthropy.com. Vinay serves on the Education Committee of the Direct Marketing Association Nonprofit Federation.



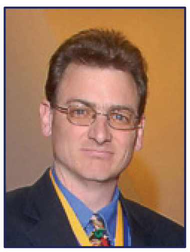
__Thursday, October 7__

Annual Campaign: Raising More Money with Fewer Resources

This seminar will discuss how to create and implement an annual campaign at your nonprofit organization that effectively engages and involves volunteers. This strategy works well whether you have an organizational staff of none or 1000 and is referenced in the text, The Annual Campaign by Erik Joseph Daubert, MBA, ACFRE (Wiley, 2009).

Target Audience: Everyone wanting to learn or review concepts about a volunteer driven annual support campaign. In my experience it is not years of service that determine a person's appropriateness for a class; rather, it is their exposure to certain concepts, systems and processes. Those who will benefit most will be those who are interested in expanding their annual support campaigns to involve more people and raise more funds. The session is usually most appropriate for those with less experience than more, but quite often a good reminder or inspiration for those who have been in fundraising for a while and are in need of new ideas or motivation. Entry, Mid- and Senior-Level - particularly those who have not worked with volunteers on fundraising. Some Advanced - who have not worked with volunteers on fundraising.

About the Presenter: Erik J. Daubert MBA, ACFRE speaks, teaches and consults on a wide variety of financial development topics. With decades of nonprofit experience, Erik is regarded as a leader in the areas of financial development and nonprofit management and is consistently ranked as a top speaker, keynote presenter and teacher at local, national and international conferences, seminars and symposiums. He has written several publications on fund raising including books and articles on topics ranging from annual to capital to endowment and grant getting. His latest book is entitled The Annual Campaign and is published through John Wiley & Sons, Inc.



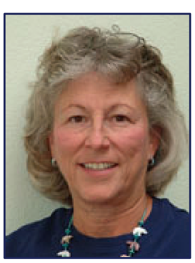
__Tuesday, November 16__

Charity or Social Service Business? The Road to Sustainability!

To contend with today's economic climate and challenges, many savvy nonprofits are learning to diversify their revenue through earned income, or social enterprise. While earned income is not for everyone, most nonprofits will find they have ready assets in what they already do, what they already know and what they already have that can be leveraged into earned income. This audio conference will discuss the steps required to become a successful social entrepreneur, from organizational assessment, to asset development, market research and feasibility, costing and financing, sales planning and finally, business planning.

Target Audience: Mid, Senior, Advanced level and Board leaders.

About the Presenter: Jean Block has more than 45 years experience in the nonprofit sector, having served as staff and volunteer leader in numerous local, regional and national organizations. She is now a national trainer and consultant on nonprofit management, Board development, fundraising and social enterprise. She has written two books: The ABCs of Building Better Boards (received a favorable review in Philanthropy Today), and Fast Fundraising Facts for Fame & Fortune. Jean began teaching social enterprise under a contract with a training organization and in 2006, was a founding partner in Social Enterprise Ventures, LLC a national training and consulting company. Her partner in Social Enterprise Ventures, Randy Gleason, has a distinguished career in both the for-profit and nonprofit sectors. In addition to his training and consulting through Social Enterprise Ventures, he facilitates strategic planning and serves as an executive coach.



Thursday, December 9

AFP Think Tank: The Law and Nonprofits

When fundraisers assist charitable institutions in identifying potential donors, they typically look first to the organization's board of directors (or board of trustees). Directors' donations of money, goods and services to the organizations they serve ordinarily create no legal risks. But what if a director offers to supply goods or services for a discounted rate, or implicitly conditions a donation on the charity's promise to contract with a business in which a director has a financial interest? These types of transactions involve conflicts of interest, and they occur with surprising frequency. For example, last year the Boston Globe reported that Suffolk University executed a $10,000/month contract with lobbyist Robert Crowe's firm, Wolfblock Public Strategies. Robert Crowe is also a Suffolk University trustee and a member of the compensation committee that made university president David Sargent the highest paid university president in 2006. And in April of 2009, Hackensack University Medical Center hired two major law firms to review its governance procedures after it came to light that the hospital routinely did business with board members. In addition to rendering these charities vulnerable to scrutiny from state and federal authorities, the revelations threatened to undermine public confidence in these important institutions.

Many damaging transactions occur because well-meaning board members fail to spot conflicts or neglect to engage in appropriate decision-making processes. This session is designed to help fundraisers and board members spot conflicts of interest, identify potentially harmful transactions and formulate procedures to ensure that transactions with board members do not violate state laws or the internal revenue code. We will explore state and federal tax law in detail, including the differences in the rules applicable to public charities (such as universities and hospitals) and private foundations.

Target Audience: This session is designed to be helpful to fundraisers who work with board members who donate funds, goods and services to nonprofits on whose boards they sit. And who lack legal expertise in corporate governance issues.

About the Presenter: Melanie B. Leslie is a Professor of Law at Benjamin N. Cardozo School of Law in New York City. Professor Leslie teaches property, trusts and estates and nonprofit law, and is the co-author of a leading casebook on trusts and estates. She has written extensively about the fiduciary duties of trustees and boards of directors. Professor Leslie is a Legal Fellow of the American College of Trusts and Estates Counsel (ACTEC), the current Chair of the Association of American Law Schools (AALS) Section on Trusts and Estates, and a member of the Association of the Bar of the City of New York's section on Trusts and Estates.