



Women in
Philanthropy

2014
Conference

Growing Philanthropy: New Visions, New Voices

MARCH 13, 2014

MassMutual Center | Springfield, MA

Learning new tactics,
reinforcing good habits, and
networking with your local peers
and other leaders in the
philanthropic world.

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WELCOME



GROWING PHILANTHROPY: NEW VISIONS, NEW VOICES

Welcome to Women in Philanthropy's conference Growing Philanthropy: New Visions, New Voices!

Nonprofit organizations are vital employers in our community, and, as fund development professionals, our work helps generate jobs, keep the lights on, alleviate food insecurity, make post-secondary education a reality, and support economic drivers. Women in Philanthropy provides the opportunity for our community of talented professionals to connect with innovative leaders who have a track record of success, bringing big thinkers to Western Massachusetts through our monthly programming and biennial conference.

This year's conference is packed with amazing talent who will share their knowledge and experience with you. We are pleased to have Amy Herman present her trademark program "The Art of Perception" to start your day. Breakout sessions will explore a range of topics to help you with your own philanthropic efforts so that you can take ideas back to your offices and put them to use. Our internationally acclaimed keynote speaker, Leslie Crutchfield, will inspire you with ways to be more innovative and impactful in your work. Plan for a full day of learning new tactics, reinforcing good habits, and networking.

Thanks for joining us for this exciting conference, and for being part of this incredible network of nonprofit professionals.



Jenny Papageorge
President, Women in Philanthropy

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Women in Philanthropy Board of Directors:

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JOIN US!



MEMBERSHIP

Women in Philanthropy (WiP) members enjoy discounts on monthly breakfast meetings and on our biennial conference. Members can post job listings on our website at a discounted rate, be listed in and have access to our annual directory of members, and have the opportunity to serve on WiP's Board of Directors.

Best of all, as a WiP member, you'll be a recognized part of a vibrant community of fundraising professionals and have many opportunities to network with some of the most talented development professionals in New England.

	\$90 Basic	\$300 Organizational (5 Designated People)*	\$200 Season Passholder
Monthly Breakfast Meetings	\$18	\$18 each	FREE!
Job Postings	\$25	\$25	\$25
Membership Directory	✓	✓	✓
Opportunity to sit on WiP Board	✓	✓	✓
Discounted Rate for WiP Conferences	✓	✓	✓
Transferrable Monthly Meeting Pass		✓	✓
Guest Passes			2 (\$64 value)

*Organizational Membership (If you choose this option, please email wipofwmass@gmail.com with the names of 5 employees who intend on using the membership.)

Student membership receives the same benefits as a basic membership and costs just \$50 per season - students must present their student ID at their first breakfast meeting.

Non-member breakfast meeting price is \$28.00.

To become a WiP member, visit www.wipwm.org/join/membership

CONFERENCE AGENDA



MARCH 13, 2014

8:30 - 10:30 a.m. Morning Plenary

The Art of Perception
Amy Herman, MA, JD

10:45 a.m. - 12:15 p.m. Breakout Sessions

Working with Boards... Successfully
Joy Challiou, MBA - SVP, Senior Nonprofit Advisor, U.S. Trust/Bank of America

Homer Simpson for Nonprofits: How the Science of Behavior Drives Millennial Giving
Alia McKee - Principal, Sea Change Strategies

The Paradigm Shift of Donor Communications
Lynne Wester - Founder and Principal, Donor Relations Guru

Best Practices in International Fundraising: Managing, People, Travel, and Priorities
Gretchen Dobson, Ed.D. - Gretchen Dobson, LLC

12:30 - 2:00 p.m. Luncheon Keynote

Do More Than Give: How Donors Maximize Philanthropic Impact
Leslie Crutchfield - Author, speaker, and leading authority on scaling
social innovation and high-impact philanthropy

2:15 - 3:30 p.m. Breakout Sessions

Making the Case for Giving to your Annual Fund
Maya Gasuk - Senior Associate, West Wind Consulting

You Can Do More that Matters
Greg Hammond, CFP, CPA - President, Hammond Iles Wealth Advisors

What it Takes to Succeed in Nonprofit Collaborations and Mergers
Peter Kramer - Manager, Nonprofit Finance Fund & Gregg Davis, MBA - Impact Consults

Not as Daunting as it Seems: Storytelling through Video and Social Media
Rachel Jellinek - Reflection Films & Jon Tapper - Senior Partner, Melwood Global

SPEAKERS



Amy Herman, MA, JD

The Art of Perception

What does a charitable planner meeting a donor have in common with an FBI agent or an emergency physician? For all of them, astute observation is critical to professional success. The Art of Perception is a highly engaging and participatory professional development program that teaches participants to enhance observation, perception, and communication skills by learning to analyze works of art. The objects are carefully chosen to hone in on skills that are relevant to specific professions. Charitable planners are in the people business as much as the financial world and it is critical that they be able to articulate precisely and succinctly what they observe about their clients. The program affords participants an opportunity to reassess and reconsider their skills of critical inquiry and perception.

About the Speaker



Amy is former Director of Education at The Frick Collection and Educational Development at WNET/New York as well as a former attorney. She brings her background in art history, law, and educational programming together to teach planners to pick up visual clues that may reveal a donor's level of interest, comfort, and trust. Amy designed, developed, and conducts all sessions of The Art of Perception. Created in 2000 to help medical students improve their observation and communication skills with patients, the program was subsequently adapted for law enforcement professionals and leaders in industry, education, and finance. She currently conducts The Art of Perception nationally for a wide range of law enforcement agencies including the New York City Police Department, the Federal Bureau of Investigation, the CIA, the United States Navy Seals, and the Department of Justice as well as for hospitals, medical schools, and first responders. The program has been featured in *The New York Times*, *The Wall Street Journal*, *The Philadelphia Inquirer*, and *Smithsonian Magazine*, as well as on the CBS Evening News.

Leslie Crutchfield - Author and Senior Advisor, FSG

Do More Than Give: How Donors Maximize Philanthropic Impact

Today's leading donors expect the highest possible social return on their philanthropic gifts and investments. High-impact givers go beyond traditional charitable acts such as check-writing and board service to work across sectors and leverage greater change. They may fund and engage in policy advocacy as well as support direct service. They may align their businesses' financial goals with social and environmental solutions to create *shared value*, rather than separate their charitable goals from their business interests. They may fund and participate in cross-sector collaborations to advance larger causes and drive *collective impact*. Find out how high-impact funders accomplish more than other donors with similar means—and what you can do to apply these lessons—in this interactive session.

About the speaker



Leslie is an author, speaker, and leading authority on scaling social innovation and high-impact philanthropy. Prior to co-authoring FSG's book *Do More Than Give*, Leslie co-authored *Forces for Good: The Six Practices of High-Impact Nonprofits* (Wiley 2008), recognized by *The Economist* on its Best Books of the Year list.

As a senior advisor with FSG, Leslie collaborates with the firm on developing new knowledge designed to advance social sector thinking and practice, bringing 20 years of social sector leadership and publishing experience to the firm. For the past decade, Leslie has guided a range of nonprofit and philanthropic organizations across North America as an independent advisor, and she is frequently invited to deliver presentations to and workshops for gatherings of leaders.

Leslie is affiliated as a Changeleader with Ashoka; she is a recent managing director of Ashoka and a former director of Ashoka's USA and Canada fellowship program. In the 1990s, Leslie cofounded and ran a nonprofit national magazine for social entrepreneurs. She serves on the boards of the SEED Foundation, Kiva, and Little Kids Rock, and she was a Crossroads Africa volunteer. Leslie is a frequent media contributor whose work has been featured in *The Washington Post*, *Fast Company*, *The Chronicle of Philanthropy*, and *Stanford Social Innovation Review*, and she has appeared on programs such as ABC News Now, NPR, and PBS.

[**Joy Challiou, MBA - SVP, Senior Nonprofit Advisor, U.S. Trust/Bank of America**](#)

Working with Boards... Successfully

Are your board members effective community advocates? Are they engaged as donors, connectors, and collaborators? This presentation will cover best practices and keys to success for building fulfilling and productive relationships with the individuals on your board. During this session, we will define the meaning of a successful relationship with board members, review the principles of effective board development and building successful relationships, identify tools and techniques to build a formal strategy around board relationship building, discuss tools for engaging your board in your development efforts, and talk about how to initiate change.

About the speaker

Joy has been working with nonprofits for 17 years providing strategies and solutions to help organizations run more efficiently in many different areas, including board development. In her role as senior nonprofit advisor, Joy serves as a consultative resource for qualified nonprofit clients of U.S. Trust, across Bank of America and its affiliates. Joy has also worked as a partner on a retail investment management team and at the American Heart Association as the vice president of planned giving and chair of their National Planned Giving Marketing Committee. Joy serves on several boards and



professional advisory committees. She recently co-authored a book titled *Nonprofit Investment & Development Solutions: A guide to thriving in today's economy*.

Gregg Davis, MBA - Impact Consults

Nonprofit Collaborations and Mergers



What motivates nonprofits to merge or collaborate deeply? What are potential associated opportunities and barriers? In this interactive session, participants will explore the field of nonprofit mergers and collaborations through examples and lessons learned from the Boston-area Catalyst Fund for Nonprofits. The session will include a discussion of considerations for local communities and nonprofits, as well as ideas on where to begin if a strategic collaboration is right for your organization.

About the speaker

Gregg is an accomplished nonprofit leader, strategic problem solver, and consultant with 25 years' experience in the sector. He has been a nonprofit co-founder, served two organizations as CEO (in human services and higher education), supervised internal operations as a chief operating officer, led fundraising operations for three organizations, consulted and advised nonprofit leadership and boards, and recently served as interim senior vice president of national development at Teach For America. Gregg has significant executive level experience in vision and strategy development, fundraising and board development, leadership, finance, organizational partnerships, meeting and workshop facilitation, public speaking, and nonprofit 'turnarounds'. He has been engaged with socially impactful investing since 1995 and recently began providing impact investing and philanthropic consulting services to families.

Gretchen Dobson, Ed.D. - Gretchen Dobson, LLC

Best Practices in International Fundraising: Travel, People, and Priorities

Some of us have 'been there.' For example, our organization's CEO or another VIP has been invited to speak at a conference in Korea, India, or London and we are asked to pull together a series of donor meetings in the next month. What do we do first? Beyond booking the flights and hotels, how do we manage our schedule in ways that provide maximum flexibility to our delegation but also provide maximum return on our investment in time and resources? This session is developed to share best practices and tips of the trade in working overseas in various countries and cultures. Not only does currency change, but so too do the expectations from key volunteers and allies. Seasoned traveler, fundraiser, and special events coordinator, Dr. Gretchen Dobson will share her stories and elicit your questions and challenges in this interactive session.



About the speaker

Gretchen is a leading global alumni relations consultant who develops international advancement programs for educational institutions and nonprofit organizations around the world. Her specialty services include strategic planning, campaign management, volunteer management, and special event facilitation for clients with particular needs outside their home country. Dobson also provides professional coaching for international alumni relations, development, and academic officers new to global engagement practices. Dr. Dobson is the author of *Being Global: Making the Case for*

International Alumni Relations (CASE Books, 2011). She was recognized by *The Chronicle of Higher Education* as one of the leading “Innovators in Internationalization” for her work at Tufts University.

[Maya Gasuk - Senior Associate, West Wind Consulting](#)

Making the Case for Giving to Your Annual Fund

Are you struggling to write a compelling fundraising letter, thank you note, or web page to tell donors why their gifts matter? Come to this session and develop the tools to make the case for giving to your program stronger than ever.

About the speaker



Maya is back by popular demand from a Women in Philanthropy annual fund session she presented spring of 2013. Trained in advertising copy writing and with over 20 years of fundraising experience, Maya helps her clients address the common challenge of how to develop messages that cut through the clutter and raise more funds and donor loyalty.

[Greg Hammond, CFP, CPA - President, Hammond Iles Wealth Advisors](#)

You Can Do More That Matters

We challenge nonprofit organizations to take the lead in showing their donors how to sustain, preserve, protect, and pass on their values, purpose, and impact. Your organization can be a change agent that empowers and inspires people to give. Learn how your organization can prosper by giving “The Ask” an overhaul. Walk away with resources, fresh ideas, and tools to engage donors and create a cultural foundation for fundraising success.



About the speaker

Greg is an expert on tax reduction and charitable giving strategies. He has been featured in the *Wall Street Journal* and *Hartford Business Journal*. For over three years, Greg co-hosted the WTIC radio show “Planning for Tomorrow.” In 2008, Greg founded Planned Giving Strategies, the delivery arm for a unique nonprofit organization legacy giving program and he recently published this first book, *You Can Do More That Matters*. Greg believes we exist to help people make a greater impact in the world. So get ready... Greg is about to show how you can increase awareness and funding at your organization as your donors build a legacy of not just their money, but of their values as well.

[Rachel Jellinek - Partner, Reflection Films](#)

Not as Daunting as it Seems: Storytelling through Video and Social Media

Does the thought of creating video for your organization give you a headache? Make you break out in a cold sweat? Video storytelling is within your reach, and it does not have to be an overwhelming experience. In fact, it can be a lot of fun! We will share tips and tricks of the trade for pre-production, production, and post-production, so you can get a lot of mileage out of video. Additionally, we will provide steps and insights on how to share video through different social media channels so that your message spreads to a wider audience.

About the speaker

Rachel is a partner at Reflection Films, an award-winning video production company. They produce marketing, fundraising, and training videos for a variety of nonprofits and businesses. Prior to Reflection Films, she worked on educational campaigns at the Massachusetts Department of Public Health as a health educator for children, a director for a literacy program, and a community relations liaison at MIT. Her experience in the nonprofit world lends itself well to understanding how to tell client stories in an emotionally compelling and entertaining way.



Peter Kramer - Manager, Nonprofit Finance Fund

Nonprofit Collaborations and Mergers

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About the speaker



Peter is a manager on the National Advisory Services team of the Nonprofit Finance Fund (NFF). He staffs and manages a number of special projects and initiatives as well as local advisory services engagements. Most recently, Peter played key roles in developing, testing, enhancing, and promoting NFF's new data analysis platforms. He also manages the Boston-based Catalyst Fund for Nonprofits, a funder collaborative that supports technical assistance for nonprofit collaborations and mergers. Peter spent a year in NFF's Capital Partners division and previously worked for El Pomar Foundation, a private foundation focused on philanthropy and leadership development in the state of Colorado. Peter currently serves on the Young Advisory Board and Finance Committee of Brooke Charter Schools.

Alia McKee, MPA, MSW - Principal, Sea Change Strategies

Homer Simpson for Nonprofits: How the Science of Behavior Drives Millennial Giving

The success of your donor outreach hinges on your understanding of the inner workings of the human mind. In order to influence behavior we truly need to understand behavior. Learn the basics of the new and revolutionary field of behavioral economics, find out how it relates to Millennials, and explore how you can use these principles to craft more effective messages that will win the hearts and minds of your audiences.

About the speaker

Alia is a veteran strategic communications and fundraising strategist with 'in the trenches' experience developing brand-perfect integrated marketing and fundraising campaigns for nonprofits. Sea Change Strategies is a strategic marketing and research consulting firm. Clients have included: The Wikimedia Foundation, Amnesty International USA, the Monterey Bay Aquarium, Environmental Defense



Fund, Conservation International and the International Rescue Committee among others. Alia is a noted speaker, author, and blogger. In 2013 she co-funded Lifeboat, a revolution of people rediscovering deep friendships, and released the first-ever State of Friendship in America Report.

Jon Tapper - Senior Partner, Melwood Global

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About the speaker

Jon has worked in the journalism and media relations fields for more than 20 years, and a large portion of that has been spent overseas, helping international organizations, non-governmental organizations and private businesses raise their profile and inform a global audience about their efforts and accomplishments. Before co-founding Melwood Global, he worked as a media advisor to the Government of Afghanistan, helping the country coordinate its communications operations as it moved into its reconstruction phase. Jon also worked at the United Nations, both in Geneva and



New York, heading the Department of Public Information's team on the Human Rights Treaty Bodies. Back in the United States, Jon was Director of Crisis Communications for one of the country's leading public relations firms and Communications Director for the Massachusetts Department of Treasury.

Lynne Wester - Founder and Principal, Donor Relations Guru

The Paradigm Shift of Donor Relations

Learn about the changing landscape of donor relations and communications, and what you can do now to keep up with the latest trends.

About the speaker

Lynne is a frequent conference speaker and well-known resource for donor relations and fundraising expertise. She has been featured in *The Washington Post*, *CURRENTS* magazine, *The Chronicle of Philanthropy*, and other industry publications. Lynne also created the website and blog www.donorrelationsguru.com where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world and hosts a monthly webinar series. Using her expertise and hands-on approach, she works with many organizations to help them keep their focus donor-driven, technologically savvy, and strategic—always with a splash of good humor.





Women in
Philanthropy



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UPCOMING 2014-2015 EVENTS!

September 10, 2014

Inspiring Generosity: A New Perspective on What it Means to be Generous

Speaker: Barbara Bonner, Author of “Inspiring Generosity”

October 14, 2014

How to Engage your Board in Grantmaking: A Practical Approach

Speaker: Marilyn Hoyt, Nonprofit Consultant

November 12, 2014

Extraordinary Donor Communications

Speaker: Beth Spong, Senior Consultant, Rainmaker Consulting

December 10, 2014

***Strategic Questioning and Listening for Intent –
A Sure Path to Generous, Joyful, Inspired Giving***

(1/2 day workshop)

Speaker: Karen Osborne, President, The Osbourne Group, Inc.

January 14, 2015

Securing Successful Sponsorships

Speaker: Shoshanah Goldberg-Miller, Ph.D. Fundraising and Management Consultant

February 11, 2015

Corporate Social Responsibility Panel: A Local Outlook

April 14, 2015

Show your Love and Raise More Money

Speaker: Tony Martignetti, Host, Nonprofit Radio

May 12, 2015

Secrets of Effective Social Storytelling

Speaker: Julie Dixon, Deputy Director, Center for Social Impact Communication,
Georgetown University

Visit wipwm.org for more details!

**Thank you to this year's
conference planning
volunteers:**

Susan Alston - Principal,
Philanthropy Guild

Karen Dionne - Assistant Director for
Development and Stewardship at UMass
Amherst, Commonwealth Honors College

Shannon Klenk - Chief Development
Officer, Girls Scouts of Connecticut

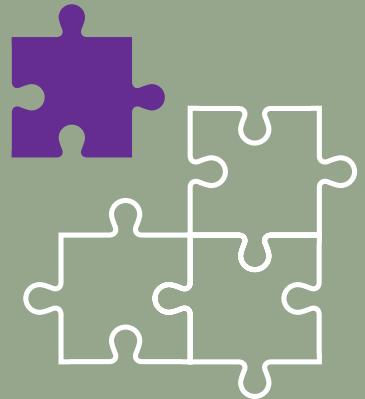
Beth Spong - Rainmaker Consulting

Judy Stokowski - Manager of
Stewardship, Pioneer Valley United Way

Melissa Voutour - Major Gifts Officer,
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FSG salutes

Women in Philanthropy of Western Massachusetts



We celebrate with you the “New Visions and
New Voices” of the region

Discovering better ways to solve social problems

FSG is a nonprofit consulting firm specializing in strategy, evaluation and research, founded in 2000 as Foundation Strategy Group and celebrating more than a decade of global social impact. Today, FSG works across sectors in every region of the world—partnering with foundations, corporations, nonprofits, and governments to develop more effective solutions to the world’s most challenging issues. At FSG, we are passionate about finding better ways to solve social problems by leveraging the power of philanthropy, government, and private enterprise to build a more effective social sector. We believe that leaders and funders can play a catalytic role, using evidence-based strategies and strategic evaluation to solve targeted problems; that corporations can create shared value by using their core capabilities in ways that contribute to both social progress and economic success; that stakeholders can be empowered to find solutions for themselves; and that better alignment within the social sector can lead to a collective impact that no player alone could achieve.

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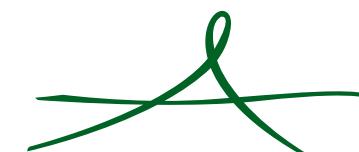
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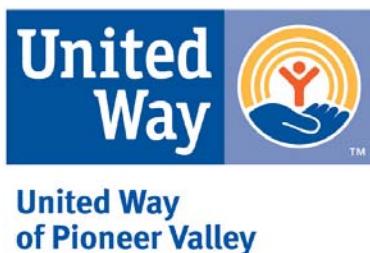
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