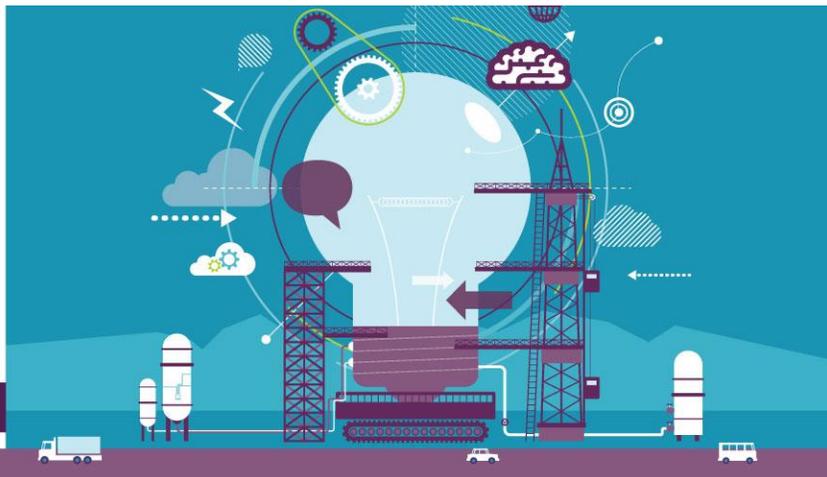


POWER UP!

2019 EMERGING PHILANTHROPY CONFERENCE

Wednesday, April 24, 2019



SESSION DESCRIPTIONS & PRESENTER BIOS

DIVERSITY & INCLUSION

Building More Than a Ramp: The ART of Accessibility

Over 50 million Americans identify as having a disability. This equates to nearly a fifth of the entire U.S. population, arguably making Americans with disabilities the largest minority group in the country. How do companies, especially within the non-profit sector, move beyond simply being ADA compliant? This session aims to broaden our view of disability and accessibility—to move beyond the wheelchair ramp as a symbol of inclusion. Through the lens of a professional theater company, attendees will be challenged to evaluate their own preconceived notions, and will leave with concrete strategies to make their work more accessible to everyone.



Kristen Link

Director of Education & Accessibility, City Theatre Company

Kristen Link is Director of Education & Accessibility at City Theatre Company where she oversees the renowned Young Playwrights program. Over the past 15 years, her work has placed her at the intersections of art, education, and disability. She is passionate about making the arts more equitable. Ms. Link has presented on the topic of arts accessibility at regional and national conferences, and is a former member of the Arts Education Collaborative Advisory Council. In 2013 she won the 'Work of Art' Award for Established Accessibility Leader from the Greater Pittsburgh Arts Council. Education: Bethany College and Emerson College.

Can We Build Equitable Relationships in An Inequitable World?

The Good Peoples Group and Center on Interracial Relationships differ from “diversity and inclusion” consultants because we emphasize identity navigation and work to expand the definition of interracial relationships to address societal inequity. To create equitable spaces we must first be present and connected with our own experience of the world. Our presentation offers a space to navigate our own identities and how our identities impact our relationships with others. Our most pressing issue is the disconnection from ourselves and each other due to internalized messages about our identities. Our work is to unlearn these messages together to break the cycle of being complicit in our own oppression and the oppression of others.



Liana Maneese

CEO, The Good Peoples Group's Center on Interracial Relationships

Brazilian born, Pittsburgh raised, Liana Maneese is an award-winning activist, visionary entrepreneur, and catalyst for creative engagement. She founded The Good Peoples Group and The Center on Interracial Relationships, where they use identity navigation as the foundational tool in social justice and personal transformation. Liana is passionate about providing an educational process that enhances individuals lives and creates a more just society. She believes that building strong, equitable, and informed relationships, with

ourselves first, can begin to shift toxic societal narratives that have created cycles of trauma for far too long. Liana has a marketing, cultural studies, and clinical mental health background.



Sydney Olberg

COO, The Good Peoples Group's Center on Interracial Relationships

Minneapolis-born Sydney Olberg has a background in international and community development planning, program management and evaluation, and Spanish language. Sydney now works to merge these fields with identity and social justice at The Good Peoples Group and The Center on Interracial Relationships. Her work in social change philanthropy and organizing led her to dig more deeply into white identity and privilege as a component of diversity work that is frequently under-examined. She loves challenging herself and others to reflect on how our identity impacts our relationships and sees her work as a new doula as deeply connected to this conversation.

EMERGING TRENDS

Emerging Fundraising Trends

Do the recent changes to tax incentives make you nervous? Have you experienced an influx of support because you work for a progressive organization? Are you up to speed on all of the new digital fundraising trends? Every year fundraisers ask themselves which strategies to use to enhance their work and raise funds. Fundraising is constantly evolving, so knowing how to adapt is essential. Join us for a preview of the trends for 2019 and how you can implement them in your organization.



Emma Kieran

Principal, Pilot Peak Consulting

With nearly 20 years of fundraising experience, Emma started Pilot Peak Consulting in 2014. She has worked with over 100 nonprofits on a range of projects from planning to implementation, coaching and interim services. Before founding Pilot Peak Consulting, Emma was Vice President for Fundraising and Development at Orr Associates, Inc. (OAI) and Senior Director at Changing Our World. Before working as a consultant, Emma worked in fundraising for Sidwell Friends School and Capitol Hill Day School. Emma holds an MA from Columbia University, an MPA from American University and a BA from Connecticut College, and is an avid marathoner and four-time Ironman triathlete.

EXECUTIVE LEADERSHIP

Professional Communications Across Generations

In this interactive session participants will learn how to: Identify generational differences, learn to be mindful of generational communication preferences in the workplace, establish communication expectations, and develop strategies to navigate generational tendencies with regard to communication.



Dr. Stephanie Adam

Associate Professor of Management, California University of PA

Dr. Stephanie Adam is an Associate Professor of Management in the Business & Economics Department at California University of PA. She focuses primarily on Human Resources topics. Formerly she was an HR professional at a small manufacturing company until obtaining her Doctorate in 2014.

The Value of Getting Lemons: Making Lemonade from Sour Feasibility Study Results

Leaders often set stakes on study results that unequivocally support a campaign. Stakeholders may be disappointed when a project can't continue without first addressing sometimes-uncomfortable issues. Do negative or cautious study conclusions mean the process was a waste? Help your team engage fully in the journey and appreciate critical results, and turn disheartening news into an inspiring, constructive, fresh start. We'll briefly review a case example and its outcomes, hosting an interactive discussion on getting the most from your study, digesting and presenting the results, and inspiring leaders to action that will set the stage for a successful future!



Diane Larusso
Senior Consultant, Health Giving

"I've got a little more than 17 years' experience in non-profit development roles, and have led and participated in the full scope of activities—from program assessment and strategic planning to the nuts-and-bolts of major gifts moves, data, events, and annual giving... not to mention those 'other duties as assigned!' I like to focus on integrated experiences for donors and prospect, and aim to design multi-faceted plans that forge true connections. I've been part of big teams—and the too-common one-human show—so I've also got some great perspectives on the challenges of both!"



Madeline Wallace
Development Manager, Joseph's Home

Madeline serves as Development Manager for Joseph's Home, a ministry of the Sisters of Charity Health System and northeast Ohio's only homeless service provider exclusively focused on medical respite care. There, she's working to develop and implement a strategic fundraising plan—including major gifts, annual fund, events and communications. Prior to this post, she served as Event Coordinator for the University Development Office at Purdue University. Madeline received her BA in Marketing/Arts Management from Baldwin Wallace University. Her passion for donor-centric fundraising and creativity propel her to advance the mission of Joseph's Home through genuine and meaningful relationship building.

FUNDRAISING ESSENTIALS

Building a Comprehensive Fundraising Program

Building a fresh fundraising program is exciting – you can design everything the right way the first time! We will discuss how to create a thoughtful donor engagement plan, gift recognition practices, fundraising calendar, development planning and the right mix of events with other strategies. There are many smart, cost-effective ways to increase support of your organization. Join us as we share some of resources and tricks to making it work on a slim budget as you build a strong fundraising foundation.



Abigayle Tobia CFRE
Executive Director, North Allegheny Foundation

Abigayle is a Certified Fund Raising Executive (CFRE) and holds a Master's Degree in Nonprofit Management from Regis University. Prior to Regis, Abigayle attended the University of Iowa where she received a bachelor's in Social Work with an emphasis in Juvenile Studies. Abigayle serves as both a consultant and Executive Director of North Allegheny Foundation. As Executive Director she has quadrupled the funds raised and mission impact in three years. Abigayle was a key member of the fundraising team at several organizations.

Budgeting 101 for Nonprofits

A nonprofit's budget is a guide that can help the organization plan for the future – it is also one of the greatest tools for a development department. Analysis and careful planning can make a big impact on a nonprofit's revenue stream. Detailed budgeting can be intimidating but is the foundation of a successful development program and sustainable nonprofit organization. We will walk through setting up a detailed development budget for both revenue and expenses. The strategies presented in this session will help you build a realistic budget that will serve as a strategic guide and foundation for the coming year.

Marcia Wallander

Director of Development, Adagio Health

Marcia Wallander is the Director of Development at Adagio Health and experienced fundraising consultant. Marcia has 25 years of experience in fundraising with a proven track-record of generating philanthropic support for healthcare and higher education institutions including Carlow University, Children's Hospital, Carnegie Mellon University and West Penn Hospital. She has extensive experience in creating and managing non-profit budgets, creating strategic plans and conducting detailed analysis to successfully fundraising goals. Marcia has extensive experience and success in securing major gifts; developing and managing effective volunteer fundraising teams; launching strategic capital campaigns; redeveloping and strategically executing annual giving campaigns and fundraising events.

The Role of Grants in a Diversified Fundraising Portfolio

With many federal grant-funded programs being compromised, the consistent reduction in state funds to social service agencies, and the shifting priorities among foundations, grants have become necessary to off-set an agency's operating and program costs. But where do grants fit into your organization's overall fundraising strategy? How do you establish a reasonable focus on grant funding to support your agency's mission? Learn about the current grant landscape of options for external funding and how to build a strategy to obtain grant funding from governmental agencies, via partnerships with industry, through developing relationships with foundations, and from philanthropic sources.



Maureen Ryan

Principal & Owner, Write Connections, LLC

Maureen Ryan is the principal of Write Connections, LLC, a Pittsburgh-based consulting firm specializing in providing professional and affordable grant writing services to non-profit organizations and for-profit companies. With more than 25 years combined experience in grant development, writing, and administration, Maureen has raised over \$80 million in government and foundation grants for nonprofits in Connecticut, Delaware, Maryland, Massachusetts, Ohio, Pennsylvania, Virginia and West Virginia. Grants have been secured for programs and initiatives in the fields of human/social services, arts/culture, K-12 and post-secondary education, workforce development, youth programs, disabilities, manufacturing, technology, energy, community development, science, and physical and behavioral healthcare.

MAJOR GIFTS

The Pivot - Transforming Your Annual Appeal Donors to Major Gift Partners

Special events, days of giving and annual appeals can be such a drain on human and financial capital for any non-profit. This session will teach fundraisers and non-profit administrators how to effectively identify and qualify internment donors and transform them into major gift partners. Objective: How to effectively utilize your current database of donors to find those individuals that have the capacity to become major gift partners. Increasing the organization's return on investment and saving the precious commodity of manpower. The format for the session will be lecture style infusing case studies discussion based on publications and professional experience.



Bernice Martin Lee

Regional Philanthropy Officer, American Red Cross

Bernice has 20+ years of professional fundraising experience and currently serves as an American Red Cross Regional Philanthropy Officer, the primary relationship manager for Greater Pennsylvania donor advised funds, community and family foundations. Her responsibilities include identifying, cultivating and sustaining major gift donor relationships. She serves as Subject Matter Expert for the American Red Cross Mid-Atlantic Division - Foundation Channel. An episodic fundraising and disaster government relations expert, she was deployed to assist in Hurricanes Matthew, Harvey, and Florence relief efforts and acts as

an Elected Official Liaison and Foundation Specialist. Be is proud to have raised over \$1 million during FY18 for community disaster preparedness and national disaster relief and recovery.

The Good, the Bad and the Ugly of Frontline Fundraising

Do you want to set yourself up for success when meeting with individual donors? Yes! Jill will cover many topics on how to be a successful front line fundraiser, including getting a meeting, developing effective business and personal relationships, dealing with inappropriate or difficult donors, personal safety, avoiding pitfalls and precarious situations and focusing on your mission: to raise money for your organization.



Jill Simmons

Sr. Director of Development, Carnegie Mellon University

Jill Simmons started her fundraising career over 15 years ago as the Development Director of a senior center in Washington County, and currently leads a team of four gift officers in her role as Sr. Director of Development for University Initiatives at Carnegie Mellon University. In her 12+ years as a front-line fundraiser, Jill combines her conversational, personal approach to major and planned gift fundraising with a focus on professional relationships to inspire donors to support the university's mission. Jill served as AFP Western PA President from 2016- 2018 and has been on the AFP board for over 10 years.

MARKETING & COMMUNICATIONS

"Tell Me a Story"

A lecture focusing on the art of storytelling and how charities can utilize this skill to communicate and fundraise more successfully. Discussion topic include: why storytelling can serve as an effective marketing/fundraising strategy, the importance of knowing your audience, the process of collecting stories, and the elements of a great story/best practices.



Aliesha Walz

Director of Development & Public Relations, Washington County Community Foundation

Aliesha Walz, a professional writer and editor, is the Director of Development & Public Relations of the Washington County Community Foundation. She began her career as the lead copywriter at a strategic marketing and advertising agency. In addition to her work in the non-profit sector, Aliesha has helped clients in diverse industries such as healthcare, fashion, fiction, education, building information technology, and manufacturing. In her role at the WCCF, Aliesha enjoys teaching charities the art of storytelling. Additionally, she helped to develop the Foundation's Heart of Giving Charity Storybook website, an innovative, community-based development tool showcasing Washington County charities.

PLANNED GIVING

Heir Conditioning: How to Make Certain that the Inheritance You Leave Will be a Blessing and Not a Curse

Utilizing actual case studies from 48 years of Estate Planning and Family Wealth Counseling in his law practice, Jack looks at human nature and reactions among unprepared heirs when they receive enough of an inheritance to ruin their lives. Citing actual cases where inheritances destroyed lives, he demonstrates in how to make certain that donors do not repeat mistakes others make by redirecting assets to charities and getting their families actively involved in philanthropic causes NOW. Using donor advised funds to bring families together to make family decisions about how to help others who are in need, he shows how to make an inheritance a blessing, not a curse.



Attorney Jack Alpern

Jack N. Alpern Co., LPA

Attorney at Law concentrating in Estate Planning and Family Wealth Counseling. B.A. and Juris Doctorate from The Ohio State University; post-graduate courses in Basic and Advanced Estate Planning from Case Western College of Law. Completed the Professional Mentoring Program. Instructor of Special Studies for 10 years at Chautauqua Institution. Instructor for continuing

education courses for attorneys through the National Business Institute and The Ohio Legal Centre Institute. Featured speaker for the Salvation Army National Conference.

Let's Talk: Secrets to Successful Planned Giving Conversations

Do you know how and when to talk to your donors about planned giving? Conversations and solicitations of planned gifts can be challenging even for the most seasoned fundraisers. Knowing that bequests and other types of planned gifts are the lowest cost, highest value gifts we can generate, all fundraisers need to do a better job of talking about planned giving with our donors and prospects. In this session we will look at how careful listening and using the right words and thoughtful strategy can make planned giving conversations more donor-focused, mission-driven and successful!



*Maureen Mahoney Hill CFRE
Principal, Advancement Advisors*

With strategy, creativity and integrity, Maureen Mahoney Hill, CFRE, counsels nonprofit clients to help them meet – and often exceed – their fundraising goals. Since starting her consulting practice in 2006, she has helped clients raise \$16 million, bringing her career fundraising total to more than \$40 million. As Principal with Advancement Advisors, Maureen's practice focuses on board training and development; coaching; planning and strategy development for major and planned gifts; fundraising plans; and audits and feasibility studies. A long-time Certified Fund Raising Executive, Maureen recently added to her credentials by achieving the status of AFP Master Trainer.

Is the CGA Still Relevant? ...You Bet... On Goes the Charitable Gift Annuity!

While the simplicity of establishing a CGA has driven its popularity and allowed many charities to grow their planned gifts.....is change on the horizon? While it has held the mantle of 'most popular life-income gift'; the overall number of CGAs received appears to be contracting. Additionally, organizations are seeing a greater variety in the type of annuities they receive, size of gift, as well as the assets being used. Discussion will range from general industry observations to specific individual gift scenarios.



*Chris McGurn
SVP, Director, Planned Giving Solutions, PNC Institutional Advisory Solutions*

Mr. McGurn is currently a Senior Vice President with PNC's Institutional Advisory Services in Baltimore, Maryland, and the Director of PNC's Planned Giving Services Group. He has worked in planned giving since 1992. McGurn served on the board of the National Association of Charitable Gift Planners (2015-2018) and as its Chair in 2018. He has served on the board of the Chesapeake Planned Giving Council (CPGC) and the National Capital Gift Planning Council (NCGPC) in DC. Prior to rejoining for-profit planned giving in 2003, he was the Director of Gift Planning at Catholic Charities of Baltimore for three years.



*Laura Bozell
Vice President, Planned Giving Client Product Specialist – Relationship Manager, PNC*

Laura Bozell is an Institutional Planned Giving Relationship Manager with PNC's Planned Giving Services group serving local and national planned giving clients. Laura assumed her current position in 2018. Prior to 2018 she served as a Planned Giving Fiduciary Advisor and team lead for the group. Bozell currently serves on the program committee for the Cleveland Planned Giving Group. She earned her Bachelor's degree in English literature from Miami (Ohio) University and designation as a Certified Trust and Financial Advisor.

PROFESSIONAL GROWTH

Networking in the Digital Age!

Success is based primarily on your ability to connect and build meaningful relationships with other human beings. “It’s not what you know, it’s who you know”. The world is happening right now online! Turning online connections into meaningful professional relationship is the new challenge. Learn how to make the connections that make the difference.

Pancho Timmons

Founder & CEO, Connect in Effect

Pancho Timmons is the Founder of Pennsylvania Youth Initiative the region’s most innovative workforce development program for youth with disabilities. He is also the founder of Connect in Effect. He has almost 20 years working with the disability community. His mission is to help people live up to their full potential personally and professionally through gainful employment. He is a talented speaker and one of the region’s most dynamic up and coming creators.

SPECIAL EVENTS

They Will Remember How You Made Them Feel

They may not remember what you said, but they will remember how you made them feel. What an applicable – and somewhat cliché – mantra, but undeniably true and the one I live by in my event planning career. Through event branding + messaging –invitations, emails, posters, Facebook posts -- to decor, food + drinks, displays, activities and venue, it's vital to create an experience unlike anything guests have had before with your organization + mission. The hope is to make your guests feel more connected, more intrigued, more inspired, more passionate and hopefully more philanthropic -- all because of one impactful (and fun) evening!



Alexis Allen

Lead, Principal Planner, {SHE}

Alexis Allen, a Pittsburgh native, is an Ohio State University graduate who started in development + event planning at OSU, managing their annual \$11 million student-athlete grant fund, and major giving at the University of Pittsburgh. In 2011, Alexis joined Shayla Hawkins, {SHE} (Shayla Hawkins Events) founder, to expand the firm, one of Pittsburgh’s only African-American-owned event planning companies. Allen and Hawkins serve clients throughout the eastern US + beyond. They have been successful by staying true to their niche - - continual emphasis + focus on details + client customization. They strive to ensure that no two events look + feel alike. In 2017 they opened SLATE Studio, a blank space for flexible use + chic celebrations, in Pittsburgh.