



WYOMING PHILANTHROPY DAYS 2008



BOOM OR BUST?

HOW WILL WE INVEST IN OUR FUTURE?

CO-HOSTED BY


Serve Wyoming

Hilton Garden Inn

University of Wyoming Conference Center

June 18-20, 2008



Welcome

The Wyoming Community Foundation in partnership with ServeWyoming is pleased to present **Wyoming Philanthropy Days 2008**. This biennial conference is the only statewide event of its kind. This three day conference offers learning and networking opportunities for nonprofit staff and board members, industry and private funders, local and state government leaders, and volunteers. With an all-day pre-conference session, two keynote speakers, 20 breakout sessions, and multiple networking opportunities, this is our biggest conference to date! Along with new and expanded offerings, we are also excited to hold Wyoming Philanthropy Days at the new UW Conference Center and Hilton Garden Inn. We hope you can join us.

Wednesday, June 18, 2008

10:00-4:00	Pre-Conference Workshop: Capturing the Energy & Expertise of Boomers, Andrea Taylor, Ph.D.
5:30-7:00	Pre-Conference Reception

Thursday, June 19, 2008

7:30-9:00	Pre-Conference Session – It COULD happen to you!				
	Track 1 Communications	Track 2 Development	Track 3 Finance	Track 4 Leadership Tools	Track 5 Volunteers
9:30-11:30	Grantwriting 101	Fundraising 101	Financial Management of Nonprofit Organizations Part 1	Implementing a Corporate Volunteer Program	Volunteer Management 101
12:00-2:00	Plenary Luncheon: Dealing with People You Can't Stand - Dr. Rick Brinkman				
2:30-3:45	Working with the Media	Major Gifts Development Panel	Financial Management of Nonprofit Organizations Part 2	Life By Design	Enhancing Volunteer Recruitment
3:45-5:00	Strategic Storytelling				Opportunities After AmeriCorps
5:30-7:00	Networking Reception				
7:00-9:00	Plenary Awards Dinner				

Friday, June 20, 2008

7:30-9:00	Plenary Breakfast: Funder's Discussion - "Funders" Fish Bowl: Talk to the Funders				
9:30-10:30	Lobbying 101 for Nonprofits	Don't be Afraid, It's Only Planned Giving	Evolving Tax Issues for Nonprofits	Hiring and Keeping Great Staff	Building Board Diversity
10:30-11:45		The Art of the Ask	Nonprofit Asset Management		
12:00-1:45	Plenary Luncheon: Your 10 Point Checklist for Launching a Successful Major Campaign, Janet Doolin, J.D.				

Keynote Speakers *Plenary Sessions*

Dr. Rick Brinkman is best known for his Conscious Communication® expertise conveyed to millions of people via keynotes and trainings, radio, television, print interviews, and numerous award-winning books, videos and audio programs. He has been touring nationally and internationally since 1980 sharing his human behavior insights and practical communication strategies in his trademark entertaining and educational style.

Dr. Brinkman has received numerous awards including Funniest Speaker of the Year by the Sales Forum and the Institute for Management Studies Distinguished Faculty award. He is the coauthor of *Dealing With People You Can't Stand*, an international best seller translated into 17 languages, three other McGraw Hill books and numerous video and audio training programs.



Janet Doolin, J.D., has 22 years experience in nonprofit and foundation work, and is a member of the Massachusetts Bar. She started her career as a trust officer with Bank of New England, and also served as an estate planning attorney with MassMutual Financial Services in Massachusetts before moving into the nonprofit and philanthropy arena.

Janet is principal of her firm, Doolin Consulting LLC, offering fund development consulting and coaching for nonprofits and foundations. She currently serves on the faculty for Regis University in Denver, Colorado, and Indiana University's Center on Philanthropy in Indianapolis, Indiana.

Janet has served on the National Board of Gift Planning Consultants and is published regularly in the national publications "Planned Giving Today" and "Planned Giving Mentor."

Her work has been published in the book, *Getting Going in Planned Giving*, and her most recent book, *Endowment 101 - A Handbook for Staff and Board Members*, is about to be released.

Janet served as senior director of planned giving and endowment at United Way in Denver, and has held development and management positions with numerous organization.



Pre-Conference

Andrea Taylor, Ph.D., is the director of the National Training Network at Temple University's Center for Intergenerational Learning. The National Training Network provides training and technical assistance to nonprofits and national service programs throughout the country, focusing on building their capacity to increase civic engagement across the lifespan and infusing

intergenerational approaches into service delivery. Dr. Taylor is the developer and principal investigator of Across Ages, an evidenced-based model project funded by the Center for Substance Abuse Prevention (SAMHSA) and is a senior research associate with Temple University's Institute for Survey Research.

Dr. Taylor provides consultation, training and technical assistance to a variety of private, nonprofit

organizations, universities, school districts, federal and state agencies. She has published numerous articles specific to the efficacy of intergenerational mentoring and risk reduction for vulnerable adolescents and is the author of *Mentoring Across Generations: Partnerships for Positive Youth Development*, (2000). Kluwer/Plenum Press.



Networking

Pre-Conference Reception

Wednesday, June 18, 2008 from 5:00 - 7:00 p.m.

Hosted by Wyoming Association of Nonprofit Organizations

Join other pre-conference attendees and exhibitors for activities and networking. Hors d'oeuvres will be served and a cash bar will be available.

Networking Reception

Thursday, June 19, 2008 from 5:30 - 7:00 p.m.

Join conference attendees, sponsors, exhibitors, organizers, and guests for this networking reception. Exhibitors will be showcasing information about their services, programs, and products. A cash bar will be available.

Plenary Awards Dinner

Thursday, June 19, 2008 from 7:00 - 9:00 p.m.

Governor Dave Freudenthal (invited) will be presenting the Wyoming Community Foundation's Newell B. Sargent Spirit of Philanthropy Award and ServeWyoming's Spirit of Service Awards.

Pre-Conference Workshop

10:00 - 4:00

Capturing the Energy and Expertise of Boomers: Turning Promising Ideas into Dynamic Practice
Andrea Taylor, Ph.D., Director of the National Training Network at Temple University's Center for Intergenerational Learning

We all know the statistics and catch phrases: "Seventy-seven million baby boomers are our greatest natural resource;" "This isn't your parent's retirement;" "Volunteers today want choice and flexibility." And, many of us know the realities and challenges of accommodating the needs and interests of adults 50+/boomers in our national service and volunteer programs: "They want to do what THEY want to do WHEN they want to do it;" "They come but they don't stay;" "I don't have the time to recruit these people let alone create new roles for them."

This informative session will provide concrete ideas for engaging, retaining and managing boomers in a continuum of opportunities within the national service and volunteer arena. Learn how to create compelling and enriched volunteer opportunities for boomers—from direct service to capacity building. Explore new strategies for recruiting and retaining folks. Create an action plan for putting abstract ideas into concrete practice.

Pre-Conference Reception

5:00 - 7:00

Thursday - June 19, 2008

7:30 - 9:00 *Pre-Conference Session - It COULD happen to you*

Deb Nelson-Allender, Emergency Preparedness and Training Coordinator with Special Emphasis on Disability Inclusion, ServeWyoming

Floods, tornadoes, fires...and you think, "Thank goodness it won't happen to me!" But what if it does? Do you have a plan? A plan for yourself, your family, your business? This session will give you some basic ideas and challenge you to think about how you can best prepare for the worst case scenario, because unfortunately in our world today we are finding out that it COULD happen to you. And as research shows, the best way to lessen the impact of a disaster is to be prepared by having a plan. Breakfast will be available for attendees of this workshop.

Pre-Conference Concurrent Sessions

9:30 - 11:30

Fundraising 101 Press Stephens, Development Director, Wyoming Community Foundation

"We have what seems to be a successful annual appeal, and we have two or three very generous people who make major contributions, but we just can't seem to get past the 'hand-to-mouth' kind of fundraising that keeps us always desperate for funds!" Learn how to put together a comprehensive fundraising strategy which will help you broaden your donor base, cultivate major gifts and planned gifts, and achieve sustainable funding. Press Stephens has helped organizations all across Wyoming increase their endowments, or establish endowments, and has helped boards of directors become effective in asset development for their organizations.

Financial Management of Nonprofit Organizations - Part 1 Peter Konrad, Ed.D, Konrad Consulting

This two-part session is designed for nonprofit managers (not accounting professionals) who need to understand and use financial information to manage their organizations. It teaches accounting principles as a language class rather than a math class. It will help managers analyze and use the financial information to spot trouble signs but also opportunities. Both sessions are on June 19th. Part 1 is from 9:30 to 11:30 and Part 2 is 2:30 to 5:00. Since Part 2 builds on Part 1, we highly recommend you register for both sessions.

Grantwriting 101 Samin Dadelahi, Senior Program Officer, Wyoming Community Foundation

"They want me to write a grant, and I don't even know where to start!" Never fear, armed with basic information, you can do this. Join Samin Dadelahi for a beginner's session in grantwriting. Consider yourself forewarned, this is a session for beginners and those new to the field of nonprofits! Participants will learn about tax exemption, classifying funders and their interests, how to create an emergency tool kit for last minute grantwriting, and the basics of a good proposal.

Implementing a Corporate Volunteer Program Gary Negich, Branch President, First Interstate Bank, Bonnie Miller, First Interstate Bank, and Randy Scott, Chair, First Interstate Bank Foundation

Join your peers and colleagues for an interactive panel discussion to learn how businesses and corporations can implement their own volunteer program and the benefits of doing so. You will hear first hand their experiences as well as the road blocks and successes from a branch view and a company-wide Foundation view.

Concurrent Sessions continued on next page...

...Concurrent Sessions continued from previous page.

Volunteer Management 101 - Your Agency Volunteer Program: If you build it, they will come.

Erica Severson, Consultant; Shelly McAlpin, Program Coordinator - Volunteer Connection, ServeWyoming

Volunteers can be a wonderful gift or a pain in your...agency. This interactive session will help you to maximize the impact volunteers have with your organization first by designing truly meaningful roles for them, next by finding the right people to fill those roles, and then how to keep them coming back for more! Advanced topics in volunteer management will also be discussed.

Thursday - June 19, 2008

Plenary Luncheon

12:00 - 2:00

Dealing with People you Can't Stand - Dr. Rick Brinkman

In an energetic, humorous manner, Dr. Brinkman's message hits home with situations people find themselves in every day and empowers them with practical solutions. Communication is like a phone number, we need all the digits to get through and we need them in the right order. When we don't pay attention to our communication and its effects on people, we often create difficult situations. By becoming a Conscious Communicator - having the skills and knowing the specific strategies to handle various problem behaviors - we empower ourselves to be successful in bringing out the best in people.

Concurrent Sessions

2:30 - 5:00

2:30 - 3:45

Working with the Media

Nathan Bekke, Publisher, Casper Star-Tribune

Nathan will be discussing a two-pronged approach nonprofits can use when working with a newspaper.

1. Advertising: How to apply for an in-kind grant, what the process entails, and some guidelines for supporting non-profits. 2. Working with the editorial department for event announcements, possible story coverage, and the importance of understanding the difference in working with advertising and the editorial departments.

Enhancing Volunteer Recruitment & Retention; How Volunteer Wyoming Can Help!

Shelly McAlpin, Program Coordinator
Volunteer Connection, ServeWyoming

Let's face it, without volunteers, our nonprofit organizations would struggle to meet their missions. This is why ServeWyoming established the Volunteer Connection Initiative, a network of Wyoming Volunteer Centers united with a searchable volunteer website database called "Volunteer Wyoming." The initiative connects nonprofits and community organizations to potential volunteers, matches people with volunteer opportunities that meet their interests and availability, and assists organizations. Volunteer Wyoming promotes the importance of volunteering as a way to mobilize people and resources to deliver creative solutions for community problems and opportunities.

3:45 - 5:00

Strategic Storytelling

Cindy J. Hamilton, SI Specialist, Casey Family Programs

Join us for an opportunity to learn how to tell your story so it is compelling to different audiences. The strategic story-telling workshop will be an interactive session where people learn how to create and share their stories. The major topics of discussion are: what is strategic story-telling, what is credibility, what are the risks and benefits of sharing your story, how to minimize the risk of sharing, and how to give and receive constructive feedback.

Opportunities After AmeriCorps

Nuriéh Glasgow, Program Officer, ServeWyoming

If you are involved with National Service and would like to know what opportunities exist for you after your service term is up, then this is the workshop for you. This workshop will help you use your experience to determine your post-service options such as: return to school, find a job, join an Alums Chapter, use your Ed Award, continuing with National Service and how to continue your pledge to a life time of service. Information and the workbook you take with you from this session will help you put your thoughts in order no matter what point you are in your term. We will help provide you with valuable sources for researching numerous possibilities, plus learn how to track your Ed Award balance and pay for loans.

2:30 - 5:00 *Major Gifts Development Panel* - Panel Moderator: Ben Blalock, President/CEO, UW Foundation

When considering comprehensive fundraising planning for sustainable operations, nonprofits across Wyoming are quick to plan and accomplish annual appeals, and quick to envision and accomplish various fundraising events, but they are often fearful of pursuing major gifts. Panel Moderator Ben Blalock will introduce and explain for the audience the value of major gifts development to the nonprofit world. Panel Members Steve Schrepferman, Joe Glode, Jay McGinnis and Trudi McMurry will describe a specific, successful fundraising effort which depended on the success of an organized major gifts component. How did they identify, cultivate then solicit those prospects? Come learn.

Concurrent Sessions continued on next page...

...Concurrent Sessions continued from previous page.

2:30 - 5:00

Financial Management of Nonprofit Organizations- Part 2

This is Part 2 of the two-part session. See description on page 4 of this brochure.

Life by Design - Managing Time with Conscious Organization™ - Dr. Rick Brinkman

Dr. Brinkman shows people how to organize for success, establish clear priorities, separate work and personal time, recover time to do what is important and eliminate procrastination. It is based on Dr. Brinkman's many years as a counselor in private practice, helping people remove the obstacles to moving forward on what is dear to them in life.

Reception & Awards Dinner

5:30 - 9:00

Newell B. Sargent Spirit of Philanthropy Award - provided by Newell B. Sargent Foundation

This award honors an individual or family who has demonstrated outstanding philanthropic leadership. This year's recipient will choose a charitable organization within Wyoming to receive a \$2,000 cash award, provided by the Newell B. Sargent Foundation.

Serve Wyoming Spirit of Service Award

Created to pay tribute to the most outstanding participants in national service programs – Senior Corps, AmeriCorps and Learn and Serve – as well as an outstanding corporate or foundation partner, a nonprofit organization and/or individual.

For more information about nominations for these awards see page 7.

Friday - June 20, 2008

Plenary Breakfast

7:30 - 9:00

Funder's Discussion - "Funders" Fish Bowl: Talk to the Funders

Facilitated by *Katharine Conover*, President of the Community Foundation of Jackson Hole

If Freud had been a grant writer, he might well have asked, "Funders -- what do they really want?" Here's your chance to find out! Join us for a dynamic interview of four diverse grant makers who will engage in an interview style discussion designed to give you an insider's view of what funders really look for in a project. Discussions will include different strategies for private foundations, individual donors and corporations. Participants are invited to submit questions before the session.

Concurrent Sessions

9:30 - 11:45

9:30 - 10:30

Don't Be Afraid, It's Only Planned Giving

Michael Donegan, Associate Director, Principal and Major Gifts Alzheimer's Association

Michael will help session participants understand that planned giving is doable at any size organization and that if nonprofits continue to avoid planned giving, they will lose their market share of bequest income to their competitors and weaken their organization over time. In addition, he will help his audience understand the importance of endowments.

Evolving Tax Issues for Nonprofits

Stephen Schmerge, Partner, McGee, Hearne & Paiz, LLP

Stephen will be discussing evolving tax issues as they relate to nonprofits. Included in the discussion is the current and proposed information that the IRS is asking nonprofits to report.

10:30 - 11:45

The Art of the Ask - Strategies for Success

Janet Doolin, J.D., Doolin Consulting LLC

Major and planned gift donors have high expectations of nonprofits and foundations when board members and staff ask donors for legacy gifts. What are those expectations? How do you effectively and simply share your organization's mission and vision for the future? Learn the essential components for putting together a winning face-to-face donor presentation—artfully sequencing major asks that will lead to commitment.

Nonprofit Asset Management

Jeffery A. Eckert, Financial Consultant, BancWest Investment Services

Nonprofits that are interested in learning about risk management, investment strategy and the basics of portfolio construction should attend this session. Jeff will discuss when to consider investments as a way to generate revenues and offer long term stability. The brief introduction will be followed by an open discussion in which individuals can ask specific questions.

Concurrent Sessions continued on next page...

9:30 - 11:45

Lobbying 101 for Nonprofits - Sarah Gorin, Equality State Policy Center; Megan Hayes, Attorney

The session will explore how to advocate for your issues without getting into trouble. Legal parameters will be discussed as well as ideas for effective lobbying.

Hiring and Keeping Great Staff - Chava Case, SPHR, HR Generalist, Align

All managers and supervisors want to reduce employee turnover. That begins with better hiring practices and building employees' commitment through your development and theirs. In this session, professionals from Western States Learning Corporation and Align™ will provide you with new ideas and tools to take back to your shop and immediately put into practice.

Building Board Diversity - Nuriéh Glasgow, Program Officer, ServeWyoming; Deb Nelson-Allender, Emergency Preparedness and Training Coordinator, ServeWyoming; Erica Severson, Consultant

Building board diversity is a trendy buzz word we hear a lot, but what does it mean exactly? What are the expectations? How does it help our organizations? Can we create diverse boards in Wyoming? Come to this interactive and informal workshop to find answers to these questions and more! The workshop facilitators will guide participants through a series of activities and provide you with information from the recent schools of thought on this issue. They will cover topics such as inclusion, board dynamics, community outreach and primary/secondary features of diversity. Don't know what some of these are? Then this is the workshop for you!

Plenary Luncheon

12:00 - 1:45

Your 10 Point Checklist for Launching a Successful Major Campaign.

How Does Your Organization Measure Up?

Janet Doolin, J.D., President and Chief Consultant, Doolin Consulting LLC

Many organizations' board and staff think they are ready and have the capacity for attaining success as they launch or (have already launched) the organization's major gift and planned gift strategy. But, what does it really take to be successful and sustain success? Explore, in a quick hands-on assessment, both the art and science of major gift fundraising. Understand, develop, and refine your organization's checklist for success. What's your readiness score? Find out today if you have the right stuff.

Registration and General information

The registration fee is \$85, which includes pre-conference and conference sessions, meals as indicated, and conference material. Register online by going to the Wyoming Community Foundation website www.wycf.org or the ServeWyoming website www.servewyoming.org where you will need to choose which sessions you would like to attend. You may pay by check or credit card. All participants must pre-register and payment must be received by June 1, 2008. For registration information, call the Wyoming Community Foundation at 307-721-8300 or 1-866-708-7878 or Serve Wyoming at 1-866-737-8304.

If you would like to purchase an extra ticket for Thursday evening's reception and awards dinner, the cost is \$30 per person. You may select this option through the on-line registration site.

Cancellations

All cancellations must be made through the e-mail confirmation you will receive. Cancellations received by June 1, 2008 will receive a refund less a \$15 processing fee. Cancellations on or after June 2nd 2008 will not receive a refund.

Conference Location and Hotel Information.

The conference will be held at the new Hilton Garden Inn and University of Wyoming Conference Center, 2229 Grand Avenue in Laramie, Wyoming. A block of hotel rooms have been reserved at the Hilton Garden

Inn. The rate is \$109-\$219 per night. The room block will be released on May 18. To make a reservation, call 307-745-5500.

Awards & Nominations

If you would like to nominate someone for the Newell B. Sargent Spirit of Philanthropy Award, go to the www.wycf.org website for more information. The deadline is April 25th. If you would like to nominate someone for the ServeWyoming Spirit of Service Award, go www.servewyoming.org website for more information. The deadline is May 16th.

Exhibitor Information

Exhibitors will be set-up in the Grand Ballroom Lobby during the majority of the conference. Be sure to stop by and visit. If you are interested in renting a table, please call 307-772-9148. The exhibitor fee includes one registration for the conference.

No Solicitation

The Wyoming Community Foundation has a long-standing rule of business with regard to Wyoming Philanthropy Days. In providing an opportunity for nonprofit organizations to meet and network with grant makers, we strive to preserve a comfortable meeting ground for all participants. This means that we respectfully request that organizations not solicit funds during the conference.

Sponsors *(as of printing)*

Benefactors:



DANIELS FUND



Major Donors:



Supporters:

Mader|Tschacher|Peterson & Co., LLC



UNIVERSITY
OF WYOMING



**313 South 2nd Street
Laramie, WY 82070**

307-721-8300

1-866-708-7878

www.wycf.org

Non-Profit Organization
US Postage
PAID
Permit No. 186
Cheyenne, WY 82001