APC Association of Philanthropic Counsel

Trends in Giving: Explore, Grow, Thrive

2021 Summer E-Forum • August 26-27

SCHEDULE OF EVENTS

PT = Pacific Time MT = Mountain Time CT = Central Time ET = Eastern Time

Thursday August 26

9:00PT / 10:00MT / 11:00CT / 12 Noon ET

Welcome & Warm-up: David Coyne, The Sheridan Group, APC Chair, and Patti Ward, Patti Ward CFRE, 2021 Summer Forum Chair

9:15PT / 10:15MT / 11:15CT / 12:15 ET

Sponsor Spotlight #1

9:30PT / 10:30MT / 11:30CT / 12:30ET

KEYNOTE PRESENTATION:
Serve More Than Pie: Using Giving USA Data as a Fundraising Consultant
Melissa Brown, Principal
Melissa S. Brown & Associates

At 65 years and counting, Giving USA has the longest run of data about charitable giving in the U.S. Consultants share top-line results frequently. Individuals are the single most important donor type. Religion is a very important contribution for many people. These are great starting points. How else can you use Giving USA data to help your clients? What other data are available, in addition to Giving USA, that will inform choices and policies? This session will be led by Melissa Brown, who edited Giving USA from 2001 through 2010 and remains an active interpreter of results. We will explore how Giving USA treats donor-advised funds, long-term trends in giving priorities across type of organization, the share of giving from highest-income households, and more. Melissa will help us peer “behind the curtain” so we can move beyond slices of pie charts as we serve our clients.

Before founding her own firm in 2011, ***Melissa Brown*** *worked at the Indiana University Lilly Family School of Philanthropy, editing Giving USA (2001-2010) and researching charitable giving by individuals, corporations and foundations. As part of her practice, Melissa analyzes charitable gift data, surveys donors and* *non-donors, and teaches for The Fund Raising School at IU Lilly Family School of Philanthropy. Prior to moving to research, she worked as a fundraiser and as a financial analyst. Melissa served as Chair of the Association of Philanthropic Counsel, 2019-2021, and volunteers on the AFP Research Council for the Fundraising Effectiveness Project. Melissa studied at Reed College (B.A. in political science) and the University of Pennsylvania (Master of Governmental Administration).*

11:30PT / 12:30MT /1:30CT / 2:30ET

LUNCH & BREAK

12:00PT / 1:00MT / 2:00CT / 2:00 ET

Sponsor Spotlight #2

12:15PT / 1:15MT / 2:15CT / 2:15 ET

Round Tables #1:

Responding to Requests for Proposals (RFPs) – Ryan Strawhecker, Paul J. Strawhecker, Inc., Moderator
Choosing the right client is as important as the right client choosing you. Learn how other consultants approach the RFP process and share your tips and ideas. Discuss when to pass on RFPs and when to go for it.

Dealing with Difficult People – Melissa Brown, Melissa S. Brown & Associates, LLC, Moderator
Consulting means sharing, coaching, listening, and bringing our expertise. What do we do when a client constituent might be described as a "difficult person"? This round table is for anyone who has insights to share or wants ideas for working with people who just aren't sure we can help.

Growing Partnerships – Barbara Shelton, CFRE, M. Gale & Associates & Angela D. Barnes, Managing Director, Carter, Moderators
As you build or renew your consultancy profile, establishing vendor or consultant partnerships is a terrific way to innovate and expand services, get more client work, and reach different demographics or industries to compete in today's market.

Shifting Sand and Silver Linings: How the Pandemic Has Altered Our Work – Carole Rylander, CFRE, Rylander Associates
The worldwide pandemic upended our world, lives and consulting practices in ways we couldn't predict. We've pivoted, adjusted and learned new strategies for living and working on shifting sand. Now that we're moving out of isolation, what will our lives and work look like? What

lessons and practices will we carry forward? Do the pandemic's dark clouds have silver linings? Join us to consider these questions and prepare for the post-pandemic world.

How to Convince Our Clients to Invest in Planned Giving – Melanie Norton, Norton Philanthropic Counsel

There has never been a better time for nonprofits to focus on planned giving to help secure their long-term ability to survive and thrive. Find out why it's so important, and how you can convince clients and others that today's investment will reap future rewards and the biggest gifts their donors will ever make!

Utilizing Coaching Methods in Our Consulting Practice – Michelle Sherbun, Leadership Design Alliance

Each time we work with a client, we bring the opportunity to build a preferred future. But they are not always as willing as they thought. We will explore reframing tools that can help move clients out of their comfort zone; how to identify and work through resistance and overcome inertia; and, ultimately, lead our clients to fearlessness.

1:05PT / 2:05MT / 3:05CT / 4:05 ET

Sponsor Spotlight #3

1:20PT / 2:20MT / 3:20CT / 4:20 ET

BREAK

1:30PT / 2:30MT / 3:30CT / 4:30 ET

Round Tables #2 (Repeat)

2:20PT / 3:20MT / 4:20CT / 5:20ET

Sponsor Spotlight #4

2:35PT / 3:35MT / 4:35CT / 5:35ET

Round Table Key Take-Away Report

3:35PT / 4:35MT / 5:35CT / 6:35ET

Adjourn/Happy Hour!

Friday August 27

9:00PT / 10:00MT / 11:00CT / 12 Noon ET

Welcome & Introductions: David Coyne, The Sheridan Group, APC Chair, and Patti Ward, Patti Ward CFRE, 2021 Summer Forum Chair

9:15PT / 10:15MT / 11:15CT / 12:15 ET

Sponsor Spotlight #5

9:30PT / 10:30MT / 11:30CT / 12:30ET

KEYNOTE PRESENTATION:
The Women's Philanthropy Institute: Research That Grows Women's Philanthropy
Jeannie Sager, Director
Women's Philanthropy Institute, IU Lilly Family School of Philanthropy

Over more than a decade, the Women's Philanthropy Institute has conducted dozens of studies that examine how and why women and men give. Individually as well as in the aggregate, the research affirms that gender matters in philanthropy. By understanding the research, we can unlock the full potential of women's philanthropy. Join Jeannie Sager, Director of the Women's Philanthropy Institute as we seek to better understand where, how, and why women and men give differently – and how you can use the research to enhance and inform generosity.

Jeannie Sager is the Director of the Women's Philanthropy Institute which is housed under the Indiana University Lilly Family School of Philanthropy in Indianapolis, Indiana. WPI believes that gender matters in philanthropy, and that solving the world's complex problems requires perspective, leadership and generosity from women and men. WPI is focused on conducting and disseminating research that grows women's philanthropy. Jeannie leads WPI's efforts to translate research to practice, works closely with WPI's national advisory council and serves on the executive leadership team for the LFSOP. Jeannie Sager is a seasoned nonprofit executive with 25 years of experience in health care, higher education, and independent school leadership. Jeannie earned her Master's in philanthropic studies from the Lilly Family School of Philanthropy and Bachelor's in international relations from Rollins College.

11:00PT / 12:00MT /1:00CT / 2:00ET

BREAK

11:10PT / 12:10MT /1:10CT / 2:10ET

KEYNOTE PRESENTATION:
Fundraising with a Race Equity Lens: Challenges and Opportunities
Lynn English, President & CEO
Lynn English Consulting
This session will engage participants in a presentation, conversation and small group discussions about the ways in which using a race equity framework can impact fundraising and organizational decision-making. The session will launch with remarks by the speaker. We will use case studies to think about the ways in which race equity can provide opportunities and challenge fundraisers and organizations. We will break into small groups to discuss the case studies with guiding questions for discussion. We will reconvene as a large group to debrief the small group exercises. And we will close the session with Q&A and best practices for moving our work as non-profit professionals forward.

Lynn English launched her strategy and resource development practice focused on fundraising, communications, strategic planning, and program development for local, national, and international nonprofit organizations and foundations over 25 years ago. Lynn has served as a fundraising executive for AARP Experience Corps, Center for Community Change, Latin American Youth Center, Year Up National Capital Region and others, and as Senior Advisor to the National Trust for Historic Preservation's African American Cultural Heritage Action Fund. Lynn holds a B.A. in English from Georgetown University and a M.A. in English Literature from the University of Maryland. She serves as Vice Chair of the Board for the Access to Integrative Medicine Institute and on the Board of Directors for Safe Shores, the DC Children's Advocacy Center. She is the co-author of Winning Grants, Step by Step, 5th Edition *(Wiley).*

12:40PT / 1:40MT / 2:40CT / 3:40ET

LUNCH & BREAK

1:10PT / 2:10MT / 3:10CT / 4:10ET

APC Spotlight

1:25PT / 2:25MT / 3:25CT / 4:25ET

KEYNOTE PRESENTATION:
Gifts of Wealth and the Psychology of the Transformational Donation
Russell James, JD, PhD, CFP, The Kaleidoscope Group
Big gifts are different. The messaging is different, the structures are different, and the psychology is different. Professor James reviews the scientific research, experimental findings and theory that underlie the most effective practices for encouraging these transformational donations. You'll leave with an understanding of both the practical fundraising "how" and the research-based "why' of raising large donations. When you are ready to "Go big or go home," this is the presentation for you!
Russell James is a professor in the Department of Personal Financial Planning at Texas Tech University, where he directs the on-campus and online graduate program in Charitable Financial Planning. He graduated from the University of Missouri School of Law and also holds a Ph.D. in consumer economics from the University of Missouri. Prior to his career as an academic researcher, he worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri and later served as president of the college. Dr. James has published research in over 75 peer-reviewed scientific journal articles and has been quoted on charitable and financial issues in a variety of news sources including The Economist, The New York Times, The Wall Street Journal, CNN, MSNBC, CNBC, ABC News, U.S. News & World Report, USA Today, the Associated Press, Bloomberg News *and the* Chronicle of Philanthropy. *His financial neuroimaging research was profiled in The Wall Street Journal's Smart Money Magazine.*

2:55PT / 3:55MT / 4:55CT / 5:55ET

BREAK

3:15PT / 4:15MT / 5:15CT / 6:15ET

Panel Discussion – Business Development Strategy: Maureen Mahoney Hill, CFRE, Advancement Advisors, Dayna Stock, The Rome Group, and David Sternberg, Loring, Sternberg and Associates

4:00PT / 5:00MT / 6:00CT / 7:00ET

Adjourn: David Coyne, The Sheridan Group, APC Chair, and Patti Ward, Patti Ward, Patti Ward CFRE, 2021 Summer Forum Chair