



## The Chameleon Consultant: Adapting for Survival

2022 Summer Forum • Portland, Oregon • June 23-25

### Featured Speakers

**“Build Your Dream Practice” with Jo Smith, Certified Management Consultant, executive coach and speaker.** Jo helps leaders improve employee engagement, client satisfaction and business profitability. She helps organizations develop leadership talent and helps professionals achieve their potential. Jo served as Managing Consultant of the Los Angeles office of Drake Beam Morin, leading a team of professional consultants to become one of the global human resource firm’s top performing offices. She also served as a Global Project Director with DBM, directing the delivery of multi-million-dollar projects to clients with multiple sites across the United States.

**“Introduction to Community-Centric Fundraising” with Michelle Muri, host of The Ethical Rainmaker podcast and founder of Freedom Conspiracy,** a small consultant collective bringing values-aligned practices to growth opportunities, with and for communities of color and the NPOs that serve them. In collaboration with her clients, Michelle practices community-centric fundraising principles and helps clients align their practices with their values to multiply their audiences and funding. Michelle is the recent former Co-Chair of Community Centric Fundraising, and former Director of Development for Northwest Immigrant Rights Project, the largest immigrant rights organization in the nation.

**“5 Simple Marketing Strategies Successful Nonprofit Consultants Know” with Jen McFarland,** founder of Women Conquer Business, helping small businesses make smart marketing decisions through courses, coaching, and content. Jen is an MPA with more than 25 years of training, teaching and executive experience in leadership, project management, and digital marketing. Previously, she led large-scale public sector projects for the City of Portland, affecting more than 50,000 businesses and handling millions of dollars.

### Thursday, June 23, 2022

Time	Session	Presenter/Facilitator
9:00	Welcome, Setting the Stage	APC Chair Dave Coyne, CFRE (The Sheridan Group, Silver Spring, MD)
9:15–10:15	Getting to Know Us: The People and Values of APC	APC Member Carole Rylander, CFRE (Rylander Associates, Dallas, TX)
10:15–10:30	Sponsor Presentation	
10:30-10:45	Break	
10:45-12:15	Building Your Dream Practice	Jo Smith, Portland-area business coach & consultant
12:15-1:30	Lunch on Own	Food truck pod is a 5-10 min walk, or restaurant in Marriott

1:30– 2:30	Shop Talk: What Can Your Firm Implement from “Building Your Dream Practice,” and How?	APC Member Facilitator Beth Hershenhart (Innovative Resources Group, Saratoga Springs, NY)
2:30 – 2:45	Break	
2:45 -3:00	Sponsor Presentation	
3:00 – 4:00	Working with Clients Who Challenge Us: Case Studies & Lessons from the Field	APC Member Facilitator Laura Hutyra (M. Gale & Associates, Fort Worth, TX) and Member Panel: Barbara Shelton, CFRE (M. Gale & Associates); Michael Rubin, CFRE (Michael D. Rubin & Associates, St. Louis, MO); Patti Ward, CFRE (Patti Ward CFRE, Santa Fe, NM)
4:10 – 4:15	Sponsor Presentation	
4:30 – 5:00	Wrap-up: Take-aways, Insights, To-Do Items from Day	APC Member Facilitator Kathy Kraas (K2 Consulting Group, Oak Park, CA)
5:15 – 5:45	Park Walk	Guided Tour – Rose City Philanthropy (Portland, OR)
6:00 – 7:00	Opening Reception by DonorSearch Dinner on own	At the Marriott “Dine Around” – Esteemed local restaurants. Each site will have a host to guide to location, make introductions, etc.

## Friday, June 24, 2022

Time	Topic	Presenter/Facilitator
7:30	Breakfast + Movement in the Park	
9:00–9:15	Welcome	APC Chair Dave Coyne, CFRE
9:15–10:15	Introduction to Community-Centric Fundraising	Michelle Muri, a co-founder of CCF (Seattle, WA)
10:15–10:30	Sponsor Presentation	
10:30–10:45	Break	
10:45–11:50	Roundtables in a “Zone of Trust”: What does CCF mean for your practice?	APC Member Facilitator Melanie Norton, CFRE (Norton Philanthropic Counsel, Indianapolis, IN)
11:50–Noon	Sponsor Presentation	
12:00–1:00	Lunch in the Hotel as part of Event	
1:00–2:30	5 Simple Marketing Strategies Successful Nonprofit Consultants Know	Jen McFarland, Portland area small business and podcasting marketing expert
2:30–2:45	Sponsor Presentation	
2:45–3:00	Break	

3:00–3:45	Shop Talk: Curating the Best Marketing Strategies for Your Consultancy	Group by firm’s capacity for marketing or, if not for your firm, by client size
3:45–4:00	Sponsor Presentation	
4:00-4:30	Wrap Up: How Have You Adapted?	APC Member Facilitator Carole Rylander, CFRE
	Working on arranging an optional, no-host urban wine tasting experience	
	Dinner in self-organized groups	Restaurant referral list to be provided early to allow for reservations

## Saturday, June 24

Time	Session	Presenter/Facilitator
7:30	Breakfast + Movement in the Park	
8:00–10:00	APC’s Future (planning session, guests invited for their perspectives and insights)	APC Chair Dave Coyne, CFRE, plus others. Includes 30-minute board meeting. All welcome.
10:15–10:30	Break	
10:30–11:00	Wrap-Up for “Chameleons”	Carole Rylander, CFRE
11:00- 11:45	Future of Philanthropy: Recent Reports & Forecasts	APC Member Melissa Brown (Melissa S. Brown & Associates, LLC, Vancouver, WA)
11:45-Noon	Closing Remarks	APC Chair Dave Coyne, CFRE