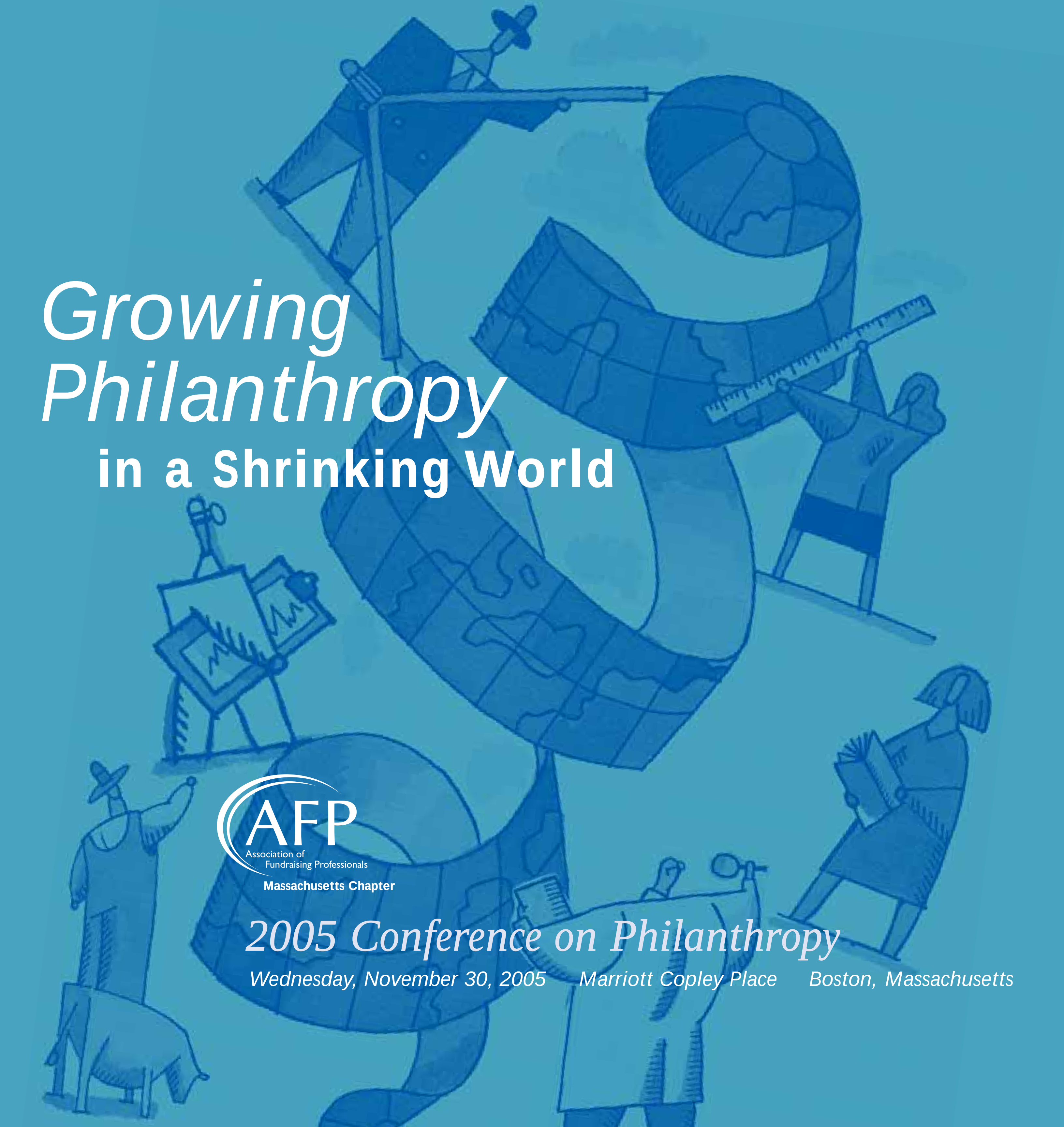

Growing Philanthropy in a Shrinking World

AFP
Association of Fundraising Professionals
Massachusetts Chapter

2005 Conference on Philanthropy

Wednesday, November 30, 2005 Marriott Copley Place Boston, Massachusetts

Dear Friends and Colleagues:

The 1200 attendees, 110 speakers, and 60+ volunteers who participate in the annual conference of the Mass. Chapter of the Association of Fundraising Professionals know that philanthropy is a very big deal. It is not only our vocation, but it is also undoubtedly the key to resolving some of the world's most critical social problems.

Every day in our work, we are called upon to balance the urgencies of our own causes with global issues that affect the landscape of philanthropy: economic upheaval, social change and shifts in political power. This year's conference theme, **Growing Philanthropy in a Shrinking World**, represents an attempt to grapple with the enormity of our mission in the smallness of today's world. One of the leaders in international philanthropy, Ray Offenheiser, President of Oxfam America will address the recent global events which have touched everyone's lives.

Our conference program includes fundamentals upon which to build a base of support, such as *The Essentials of Records Management* and *Gift Planning Overview*. We have also captured cutting-edge developments in the field; for example, the *Implications of Sarbanes Oxley for Non-profit Organizations* and *Expanding the Donor Pool: Lessons Learned from the Business World*. To develop the conference theme, we have included topics like the *Challenge of Thinking Globally While Acting Locally* and *Mass Media: Your Link to the World*. Come November 30, the Copley Marriott Hotel will transform into an international marketplace of opportunities to learn, network, and explore trends in the world of philanthropy.

The scope and value of the conference will extend well beyond the array of educational sessions. The latest in vendor services will be expertly represented by our conference sponsors in the showroom. Throughout the day, roundtable discussions, mentoring and informal networking opportunities will abound. For those wishing to enter, advance or transition within the field, a unique Philanthropy Career Fair will be held prior to the conference on November 29 — see page 26 for a description of this exciting new addition to the Chapter's outreach programs.

The annual conference gives development professionals a chance to experience the collective energy of hundreds of individuals whose work transcends the daily task of attracting funds for important social causes. We are the world of philanthropy, with possibly the most important job to be done in our global society today. Send in your registration form and join us at the Copley Marriott Hotel on November 30!

Sincerely,

Molly F. Williams

Molly Fannon Williams

Conference Chair

Plenary Session

8:30 am – 9:20 am

Raymond Offenheiser

President, Oxfam America

After working for more than 20 years overseas, Raymond C. Offenheiser returned to the US in 1995 to join Oxfam America as its President. Oxfam America, a Boston-based international relief and development agency, is the U.S. affiliate of Oxfam International—a confederation of 12 Oxfams which collectively work in 120 countries, and have an annual revenue of more than $500 million.

Under Mr. Offenheiser's leadership, Oxfam has more than doubled in size in 10 years, and has repositioned itself as an expert on international development and global trade.

Mr. Offenheiser has represented Oxfam in meetings with the US Congress, State Department, and National Security Council, and with key policymakers including UN Secretary Kofi Annan, Secretary of State Madeline Albright, President Bill Clinton, and World Bank President James Wolfensohn, among others.

He is a member of the Council on Foreign Relations, the Global Interdependence Initiative at the Aspen Institute, and the Carnegie Endowment for International Peace and Inter-American Dialogue. Offenheiser has served as an advisor for Harvard University's Asia Center, the Hesburgh Center for International Studies at the University of Notre Dame, the School for International and Public Affairs at Columbia University, and the John F. Kennedy School of Government at Harvard University.

Mr. Offenheiser is a frequent commentator in the media on such issues as foreign aid, international debt, philanthropy, human rights, and global trade policies. He has appeared in programs on CNN, NPR, and the BBC, and has been a quoted source in the *New York Times, Washington Post, Boston Globe, Baltimore Sun* and other major American newspapers.

Mr. Offenheiser has worked his entire career in the non-profit sector. He brings more than 20 years of international development experience as a field programmer, grant maker, and manager in Asia and Latin America. Mr. Offenheiser holds a Master's Degree in Development Sociology with a minor in Agricultural Economics and International Agriculture from Cornell University and earned his Bachelor's Degree with honors from the University of Notre Dame. He speaks fluent Spanish and Portuguese.

A SPECIAL THANK YOU TO OUR SPONSORS:

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General Conference Information

WHO SHOULD ATTEND?

Anyone interested in learning more about the nuts and bolts, the reality, and the skills needed to be a successful fundraiser:

- Board Members and Trustees
- Development Professionals
- Executive Directors
- Public Relations and Marketing Professionals
- Professionals in Transition
- Prospect Researchers
- Volunteers

WHY SHOULD YOU ATTEND?

More than 60 presentations and workshops are offered at varied skill levels in these areas:

- Advancement Services
- Annual Fund
- Capital Campaigns
- Communications and Marketing
- Corporations and Foundations
- Donor Relations
- Global Philanthropy
- Major Gifts
- Management
- Planned Giving
- Small Shop

OTHER LEARNING AND ADVANCEMENT OPPORTUNITIES INCLUDE:

- Book Store
- Job Postings Area
- Luncheon Roundtables
- Mentoring Program
- Networking
- Resource Hall
- Wired Development Office

The AFP, Massachusetts Chapter conference brings together hundreds of development professionals who share a commitment to advancing fundraising at non-profit organizations throughout New England. During the conference — in sessions, workshops, breaks, and at lunch — you will have opportunities to learn from industry professionals, network with colleagues, discuss common challenges, and share practical ideas which will help you further your organization's work. You will return to your workplace energized with new connections, useful ideas, and a broadened perspective to help maximize your fundraising programs.

The Resource Hall provides a first-hand opportunity to learn about and explore a variety of products and services all in one day. The resource providers are there to guide you through your many questions and concerns. Among the services and products represented are fundraising software, mail house services, recognition products, consultants, and more. Be sure to visit each resource provider and learn what services they have to offer and how they can help your development office take the next step in your fundraising efforts!

Confirmed Resource Providers Include:

- **Advanced Solutions International**
- **AmeriMail Corp.**
- **AuctionPay**
- **Big Duck Studio**
- **Blackbaud**
- **Campbell & Company**
- **cMarket, Inc.**
- **Community Counselling Service Co. Inc.**
- **Contribute.com**
- **Convio**
- **Copley Business Service**
- **Copley Harris Company**
- **Cutting Edge Promotional Products**
- **The Development Guild/DDI**
- **DonorPerfect/SofterWare**
- **eTapestry**
- **Graham-Pelton Consulting**
- **Harpswell House, Inc.**
- **Honorcraft Incorporated**
- **IDC**
- **JM Perrone**
- **JMT Consulting Group**
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- **Spirit Cruises**
- **Strategic Fundraising**
- **TowerCare Technology**
- **Trinity Direct**
- **Vital Data Management**
- **WealthEngine.com**

Conference Overview 2005

Registration and Continental Breakfast *7:30 am–8:30 am in the Resource Hall.* **Plenary Session/Annu**

	Advancement Services	Annual Fund	Capital Campaigns	Communications and Marketing	Corporations and Foundations
Session 1 9:30 am–10:45 am	Everything You Need to Know to Create and Maintain High Quality Donor and Prospect Records AS1A all	Converting Members/ Subscribers into Donors AF1 SS E M	The Ultimate Gift CC1A SS — OR — The Conduct of a Feasibility Study CC1B M A	2 Heads are Better than 1: Building an Integrated, Collaborative Communications Plan CM1A M A	Return on Investment: From Corporate Sponsor to Partner CF1A all

Coffee Break *10:45 am–11:15 am in the Resource Hall. Visit our Resource Providers. Drop by the W*

	Advancement Services	Annual Fund	Capital Campaigns	Communications and Marketing	Corporations and Foundations
Session 2 11:15 am–12:30 pm	Data Integrity — It's Life or Death for Your Shop! AS2 all	Maximizing Market Penetration AF2A M	Campaigns for Small Shops CC2A SS all	Special Events: Using Communications to Differentiate Yours From Theirs CM2A A S	Tough Times or Smooth Sailing: Latest Trends in Corporate & Foundation Giving CF2 all

Lunch and Networking *12:30 pm–2:00 pm. Participate in a Luncheon Roundtable or a Mentoring Ses*

	Advancement Services	Annual Fund	Capital Campaigns	Communications and Marketing	Corporations and Foundations
Session 3 2:00 pm–3:15 pm	Charitable Contributions: What You Need to Know but May be Afraid to Ask AS3A all		Using Capital Campaigns to Grow Annual Giving CC3 M A	Taming Your Wild and Woolly Website CM3A — OR — Online Fundraising Auctions: New Revenue, Better Advocacy CM3B all	Services & Volunteers: Securi In-Kind Donations CF3A SS

Afternoon Ice Cream Break *3:15 pm–3:45 pm in the Resource Hall.Visit our Resource Providers. Drop*

	Advancement Services	Annual Fund	Capital Campaigns	Communications and Marketing	Corporations and Foundations
Session 4 3:45 pm–5:00 pm	Embarking on Data Modeling: Building an In-house Major Gifts Prospecting Tool AS4 all	Strategies for Moving High-End Annual Fund Donors Up the Ladder AF4A all	Human Dimensions of Campaigns: Beating the Odds with Optimism CC4 all	Expanding the Donor Pool: Lessons from the Business World CM4	Match.coz — Making the Perfec Match CF4A all — OR — Working with Spo Foundations CF4B all

President's Reception *5:00 pm–6:30 pm*

Look for these symbols to help you determine which sessions t

ual Meeting *8:30 am–9:20 am.*

	Donor Relations	*Global Philanthropy*	*Major Gifts*	*Management*	*Planned Giving*
r	**Stewardship 101 & 102** DR1 (SS) (E) (M)	**International Giving in a Small World** T1 (M) (S)	**The Psychology of Major Donors** MG1	**5 Habits for Success** M1	**How and Why to Start a Planned Giving Program** PG1A (all)

ire Development Office or relax in the Networking Area (open until 4:00 pm).

	Donor Relations	*Global Philanthropy*	*Major Gifts*	*Management*	*Planned Giving*
	Donor Relations within the Organizational Structures of the Development Office DR2A (all)	**Using PR & Marketing as a Force for Social Change** T2 (all)	**Engaging the Future with Young Donor Programs** MG2 (all)	**Implications of Sarbanes Oxley for NPOs** M2A — OR — **Letting the Other Guy Get Your Way** M2B (all)	**Basic Financial Understanding of Planned Gifts** PG2 (all)

ssion (pre-registration is required) or Network with Colleagues. Visit the Resource Providers. Refer to your Registration

	Donor Relations	*Global Philanthropy*	*Major Gifts*	*Management*	*Planned Giving*
ing s	**Donor Relations and Management of the Endowment** DR3A (SS) (M) (S)	**The Challenge of Thinking Globally** T3A (all) — OR — **Mass Media: Your Link to the World** T3B (all)	**Understanding Family Foundation Dynamics** MG3A (all) — OR — **Obtaining Major Gifts through Direct Mail** MG3B (all)		**Opening on Broadway — The Two Faces of the Big Ask** PG3 (M) (S)

p by the Wire Development Office or relax in the Networking Area (open until 4:00 pm).

	Donor Relations	*Global Philanthropy*	*Major Gifts*	*Management*	*Planned Giving*
ct rts	**Luminous Liaisons: Value-added Stewardship Partnerships in the Development Office** DR4 (all)	**Red State/Blue State: Mining Political Contributors for Philanthropy** T4 (all)	**The Inside Story: How Women Philanthropists are Making a Difference** MG4A (all)	**Helping Your Program in Leader-ship Transition** M4A — OR — **Legal Landscape — What You Need to Know** M4B	**Gift Planning Overview** PG4A (all)

o attend: (all) = All Audiences (E) = Entry Level *(0–1 year)* (M) = Mid-level *(2–4 years)* (A) = Advanced *(5–9 years)* (S) = Senior *(10+ years)* (SS) =

Session	Small Shop	Workshops*			
Session 1 *9:30 am–10:45 am*	**Maximizing Relationships with Leadership** SS1A (SS)	**Research 101** AS1B (E) — OR — **How Branding REALLY Works: Two Case Studies** CM1B	**Secrets of Preparing Winning Grant Proposals** CF1B (M) (S)	**Estate Administration from A to Z** PG1B (all)	**The Virtual Office: Managing Your Work Remotely** SS1B (SS) (M) (S)
Session 2 *11:15 am–12:30 pm*	**Managing Board Members and Volunteers** SS2A	**Cost Effective Donor Stewardship Strategies** AF2B (all)	**Volunteers: Treasures or Troubles** CC2B (all)	**Telling Stories to Move Donors Closer to You** CM2B	**Best Practices in Endowment Fund Reporting** DR2B — OR — **E-Technology on a Shoestring** SS2B (all)
Session 3 *2:00 pm–3:15 pm*	**Planning for Success in a Small Shop** SS3A (SS)	**A Structured, Organized Process for Selecting a Fundraising System** AS3B (all)	**Foundation Proposal Writing** CF3B (all)	**Parties, Presents, and Plaques** DR3B (all) — OR — **Being Present** M3 (all)	**The Few, The Proud, The Solicitors: How to Feel Comfortable Making the Ask** SS3B (SS) (E) (M)
Session 4 *3:45 pm–5:00 pm*	**One Fish, Two Fish, Reeling in the Big Fish: Making a Major Gifts Program Thrive in a Small Shop** SS4A (SS) (M)	**Impacting Workplace Giving** AF4B (all)	**Be Careful What You Wish For: Navigating, Managing, and Promoting Campaign Challenges** MG4B (all)	**Planned Giving Marketing: Notes from the Field** PG4B (all)	**Prospect Research and Its Role in "The Ask"** SS4B (SS) (M)

Packet for locations.

= Small Shop *(0–3 staff)*

* *Workshops limited to 20 participants.*

Day in Review

7:30–12:00	Registration
7:30–8:30	Continental Breakfast
8:30–9:20	Plenary Session/Annual Meeting/Announcement of Fellows (2006–2007)
9:30–10:45	Session 1
10:45–11:15	Coffee Break **SPONSORED BY COMMUNITY COUNSELLING SERVICE CO., INC.** Visit Resource Providers, drop in at the Wired Development Office, peruse the Job Listings* and Book Store, or relax in the Networking Area
11:15–12:30	Session 2
12:30–2:00	Lunch Network during Lunch, participate in a Roundtable,** or in the Mentoring Program
2:00–3:15	Session 3
3:15–3:45	Ice Cream Break **SPONSORED BY OUR RESOURCE PROVIDERS** Visit the Resource Providers, drop in at the Wired Development Office, peruse the Job Listings and Book Store, or relax in the Networking Area
3:45–5:00	Session 4
5:00–6:30	President's Reception **SPONSORED BY THE WAYLAND GROUP** Take a moment at the end of the day to relax, have a refreshment, and network with your colleagues

The Resource Hall, Networking Lounge, Job Listings Area, Book Store, and Wired Development Office are open until 4:00 pm.

*SPONSORED BY RUOTOLO ASSOCIATES INC.

** SPONSORED BY VITAL DATA MANAGEMENT

Track Descriptions

Advancement Services Track

Advancement Services is the infrastructure that drives any successful fundraising department and this track covers the various components…. In the first stages of prospect identification, prospect research plays a key role in compiling and analyzing donor information to suggest gift strategy. A key component of managing donors and prospects is the database and the management of the files. Choosing the correct system is integral to success. Keeping up with changes in the laws affecting fundraising is an ongoing task. Knowing how well you are performing some advancement services tasks, such as gift processing, is key to improvement. By the end of this track, you will leave with increased knowledge about these “back office” aspects essential to fundraising at all levels.

Annual Fund Track

The Annual Fund track is designed to benefit professionals at all levels and provide valuable information that will help improve your annual fund program. From converting members into donors, to moving donors up the ladder to increase your share of the marketplace, this track addresses important aspects of the annual fund. The presenters from large and small shops represent various sectors in the industry. You can look forward to a fantastic day of learning and networking with colleagues on the best practices in annual giving!

Capital Campaigns Track

Sessions in the Capital Campaign track focus not only on strategic elements involved in conducting a capital campaign, such as conducting a feasibility study and aspects of a small shop campaign, but also on growing the annual fund during a campaign and the use of volunteers. Whether you are contemplating a campaign or in a campaign of your own, this track is sure to have something to fit your needs.

Communications and Marketing Track

The Communications and Marketing track explores several elements of an effective communications and marketing program. From building an integrated communications plan to creating a brand or using a special event as part of your marketing, there is something for everyone. The track's presenters bring a spectrum of talents and experiences to the programs, virtually guaranteeing that no one will go away without inspiration and new skills.

Corporations and Foundations Track

The Corporations and Foundations track is designed to help the general professional understand the unique demands of raising funds from among corporate and foundation entities, while giving the specialist the latest insights into corporate and foundation giving trends and best practices. Sessions include broad overviews and specific "how-to" discussions on creating partnerships, sports foundations, and in-kind donations. Hands-on workshops concentrate on improving writing skills and program building.

Donor Relations Track

Donor Relations is an emerging career within fundraising. The presentations in this track will cover the fundamentals of stewardship; the role of donor relations in a development office; managing the endowment; and effective donor recognition practices. Whether you have the title of donor relations or not, there is sure to be valuable information disseminated.

Global Philanthropy Track

Whether you are working for a local non-profit or one whose mission serves those nationwide or around the world, more and more you and your organization are impacted by what is happening outside the region. The Global Philanthropy track explores the arising issues of fundraising in a global economy — from international fundraising, to using public relations and the media to outreach to a larger community, to mining political contributors for donations. Join these conversations to discover how you can expand the reach of your charity.

Major Gifts Track

The Major Gifts track tackles emerging issues and perennial questions in major gift fundraising. Whether you are in a small shop or work in a large, complex environment, you can benefit from the sessions which focus on the psychology of major donors and young donors programs. Those in small shops are offered a session on how to use direct mail as part of a major gifts program. Everyone will benefit from the presentations on family foundations, women philanthropists, and major gifts during a campaign.

Management Track

The Management track is for professionals who are responsible for overseeing fundraising, financial, personnel, and administrative duties of an organization, or for those who want to know more about what it takes to "be in charge". In many small shops the manager is the primary fundraiser for the organization, and in large organizations, development professionals and managers need to be aligned closely with the mission and goals of their organization and each other. Several sessions in this track will provide strategies for mastering the "nuts and bolts" of non-profit management as well as covering specific laws which all fundraisers should know. Other sessions have been dedicated to "the vision thing" and how you can attain the qualities of an effective leader. Leaders come in all shapes, sizes, and personal styles. Effective managers are made not born. Come learn to lead…or manage!

Planned Giving Track

The Planned Giving track presents general topics; from the basics for starting a planned giving program and estate administration to different techniques for making the ask. Track topics focus on the intersection of planned and major gifts fundraising, recognizing that you may devote only a portion of your professional time to planned giving.

Small Shop Track

For most professionals in a small shop there is always a lot to get done and not a lot of time or resources. The sessions in the Small Shop track will help you maneuver through your day, and get everything done, from managing your office remotely and maximizing relationships with leadership to using technology advantageously on a limited budget.

Should You Stay on Track or Beat a New Path?

Conference tracks follow common development specialties or areas of increasing importance to the field. If your job description falls in one of these tracks, you'll find a wealth of in-depth and cutting edge information. However, it's equally possible to select across the tracks to create a day's curriculum tailored to your interests or your organization's needs. Take cues from speaker affiliations but remember many of our speakers have experience beyond their current positions. You also can select presentations that draw on experience in education, health care, the arts, social services, the environment, and other areas.

SESSIONS & WORKSHOPS

Each year, the tracks are divided into presentations or workshops. In some cases more than one presentation or workshop is offered on a given subject during each time period.

The fundamental difference between a session and a workshop is in the number of attendees. Workshops are limited to 20 participants. This provides participants a chance to roll up their sleeves and get their hands on the subject matter. The sessions are more of a lecture style presentation but can be interactive depending on the speaker's format.

Here are just a few ideas to get you started on an individualized path:

PATH FOR ADVANCED PROFESSIONALS

CC1 **The Ultimate Gift**

CM2A **Special Events: Using Communications to Differentiate Yours from Theirs**

PG3 **Opening on Broadway — 2 Faces of the Big Ask**

M4A **Helping Your Program in Leadership Transition**

PATH FOR BEGINNERS

AS1B **Prospect Research 101**

– OR –

PG1B **Estate Administration from A to Z**

CM2B **Making Connections: It's All About Stories**

MG3A **Understanding Family Foundation Dynamics: Structure and Decision**

– OR –

SS3B **The Few, The Proud, The Solicitors: How to Feel Comfortable Making the Ask**

WRITING FOR DEVELOPMENT

CF1B **Secrets of Preparing Winning Grant Proposals**

CM2B **Telling Stories to Move Donors Closer to You**

CF3B **Foundation Proposal Writing Workshop**

PATH FOR EXECUTIVE DIRECTORS

M1 **5 Habits for Success**

SS2 **Managing Board Members and Volunteers**

AS3A **Charitable Contributions: What You Need to Know but May be Afraid to Ask**

M4A **Helping Your Program in Leadership Transition**

PATH FOR SOCIAL SERVICES

AF1 **Converting Members/Subscribers into Donors**

AF2B **Cost Effective Donor Stewardship Strategies**

– OR –

MG2 **Engaging the Future with Young Donor Programs**

MG3B **Obtaining Major Gifts from Direct Mail**

SS4B **Prospect Research and Its Role in "The Ask"**

PRESENTATIONS

Advancement Services

Everything You Need to Know to Create and Maintain High Quality Donor and Prospect Records

Code AS1A

Jim Coulson, *CRM, FAI, Principal, Records Improvement Institute, LLC*

Records and related information are of critical importance to a philanthropic organization. The ability to leverage institutional knowledge has a direct impact on operations, specifically the ability to obtain donations and bequests while operating as efficiently and cost effectively as possible. Most philanthropies are committed to improving the management of their information resources, many also are concerned with the accessibility of information needed to support ongoing work, the fragmentation of files among various members of the team and the lack of specific procedures for the management of information. This session will include recommendations to assist in prioritizing those needs and establishing a plan for effective records management.

all

Annual Fund

Converting Members/ Subscribers into Donors

Code AF1

Howard Amidon, *Director of Individual Giving, Boston Ballet*

Edward Gargiulo, *Assistant Director of Membership, Museum of Fine Arts, Boston*

Members and subscribers are vital to many non-profits as both an audience and source of revenue, but how do you convert their interest into additional support? Whom should you target? When is the right time to ask? Should you mail, call, or do both? In this session learn how two organizations respond to these and other questions. From analyzing a program's effectiveness, to special asks vs. annual fund, to multi-channel solicitation, find out how the Boston Ballet, and the Museum of Fine Arts, Boston turn their subscribers, members, and even ticket buyers into donors.

SS E M

Capital Campaigns

The Ultimate Gift

Code CC1A

Don Jones, *Vice President for Institutional Advancement, New England Conservatory*

Jim Kitendaugh, *President, The Wayland Group*

Susan Strickler, *Director, Currier Museum of Art*

What is the "magic" of securing large, transformational, ultimate gifts? How can these inspirational gifts transform your institution programmatically? Equally important, how can such gifts help change the landscape of philanthropy? This session will demystify the process of securing large gifts and will convert what looks like magic or simple good fortune into reality. In addition to an expert presentation, two case studies of organizations will be presented — from those that have done the painstaking work to secure and benefit from ultimate gifts. Learn how you can work toward attaining ultimate gifts for your institution and the lasting rewards you will experience.

A

The Conduct of a Feasibility Study

Code CC1B

Joseph Caporale, *CFRE, President and COO, Ruotolo Associates, Inc.*

The overall objective of a feasibility study is to provide qualitative and quantitative information to the institution's leadership on whether or not to embark on a capital campaign. This interactive session is a practical guide to conducting a feasibility study. It will include process, methodology, deliverables, and the various components of study. The feasibility study process is a valuable tool to measure the financial potential of a major capital campaign, along with the identification of appropriate volunteer leadership and the most effective method, structure, and plan for conducting such an effort. It should provide specific strategic observations and recommendations that will assist an institution in defining the proper approach for structuring and communicating its capital campaign.

M A

Look for these symbols to help you determine which sessions to attend:

all = All Audiences · M = Mid-level *(2–4 years)* · S = Senior *(10+ years)*

E = Entry Level *(0–1 year)* · A = Advanced *(5–9 years)* · SS = Small Shop *(0–3 staff)*

Communications and Marketing

2 Heads are Better Than 1: Building an Integrated, Collaborative Communications Plan

Code CM1A

Nancy Brimhall, *President, Brimhall & Associates*

Nicole Gakidis, *Marketing and Search Consultant*

Building partnerships between marketing and development teams is an important key to reaching your target market. Today, both marketing and development must function as two sides of the same brain — each contributing and each being rewarded for their own firepower. Blending strategies and tactics that enhance the brand will impact the bottom line positively! Learn invaluable techniques including strategies for an improved working relationship between development and marketing; how to maximize the organizational investment in marketing and fundraising initiatives; and understanding organizational models that work well (and don't work well).

M A

Corporations and Foundations

Return on Investment: From Corporate Sponsor to Partner

Code CF1A

Vicary Graham, *Managing Director, Private Wealth Management, Mellon New England*

Joanne Jaxtimer, *First Vice President of Corporate Affairs, Mellon New England*

Liz Page, *Principal, Liz Page Associates*

One of the most innovative corporate funders in Boston, a private wealth expert, and a fundraising event producer will share what they look for when developing connections between the business community and nonprofit organizations. They will coach you on how to present your opportunity, manage the relationships, and deliver results to create a lucrative, long-term partnership.

all

Donor Relations

Stewardship 101 and 102

Code DR1

Sally K. Dale, *Director of Stewardship, Boston Symphony Orchestra*

Bonnie Palmer Weeks, *Director of Stewardship, Phillips Exeter Academy*

The presenters will cover building a stewardship program from the ground up; essential components to ensure that your program best serves your multiple constituencies; and key business practices and internal organizational alliances to ensure success. Whether you are a newcomer to stewardship/donor relations or seeking to expand an existing program with new initiatives and tools, you will learn the essential ingredients for your stewardship program.

SS E M

Global Philanthropy

International Giving in a Small World

Code T1

Raja Kamal, Ph.D., *Associate Dean for Resource Development, University of Chicago*

The presenter has raised funding all over the world for organizations such as Harvard University, St. Jude's Children's Research Hospital, and the University of Chicago. Although these are large institutions, the lessons learned apply to all organizations and approaches to international prospects. Hear from this distinguished and accomplished international fundraiser about the differences in raising money in various cultures and how to be successful raising money from international prospects for hospitals, colleges and universities, and social service organizations. Whether the money is Euros, Dinars, Pesos, or Yens, it all adds up to prove international giving makes this a smaller world!

M S

Major Gifts

The Psychology of Major Donors

Code MG1

Steve Grossman, *President, MassEnvelopePlus*

The speaker, a major donor, board member, and volunteer solicitor for countless nonprofit organizations, presents his insights into what motivates a major donor to give a large gift. He will engage in a conversation about the ways to engage potential donors intellectually and emotionally. Topics to be discussed will include factors that motivate a donor's decision to make a transformational gift to an organization; the role the CEO plays in securing such a gift, in terms of leadership and inspiration, as well as personal connection to the donor; the importance of the board, in both its governing quality and personal connections; and the importance of the gift's transformational impact on the institution. In addition, he will give insight into key personal motivations donors may have, including generational and community responsibility.

all

Management

5 Habits for Success

Code M1

Louise Burnham Packard, *Executive Director, Trinity Boston Foundation*

Beth Balmuth Raffeld, *Vice President for Development, Museum of Science*

Reflecting on lessons learned leading teams at development offices of varying sizes and missions, the presenters will share their views on the habits of successful fundraisers. This session focuses on the day-to-day realities of a senior fundraiser and the habits it takes to succeed.

A S

Planned Giving

How and Why to Start a Planned Giving Program

Code PG1A

Liz Cahn, *Senior Associate, Copley Harris Company*

According to Wayne Gretzky, you miss 100% of the shots you never take. Come find out why planned giving is a shot that your organization can't afford not to take. This session will help you start a planned giving program or improve the one you have, even if planned giving is not your primary responsibility.

all

Small Shop

Maximizing Relationships with Leadership

Code SS1A

Larry G. Raff, *Vice President, Copley Harris Company*

Development officers are typically responsible for two things — raising money and managing expectations of leadership. Recognizing that success in managing expectations with leadership often leads to raising more funds for your institution, this session addresses building and maximizing relationships with the CEO, board chair, committee chairs, and others so that everyone has their eyes on the same ball and everyone will know its color, size, texture, and bounce. Sound planning, goal setting, communication, and execution are the keys to ensure these busy and committed people become key players on your team.

SS

WORKSHOPS

Advancement Services

Research 101

Code AS1B

Charles Carr, *Associate Director, Development Research and Systems, MIT*

If you're new to the advancement research profession, or a fundraiser who needs to do basic research on your own, this overview of prospect research is a must. Topics include free and paid sources; simple techniques for identifying and profiling individuals, corporations, and foundations; and an introduction to stockholdings research and giving capacity ratings. Handouts will include source lists, websites, sample formats, and checklists.

E **WORKSHOP — LIMITED TO 20**

Communications and Marketing

How Branding REALLY Works: Two Case Studies

Code CM1B

Nancy Lehrer, *Senior Vice President, Marketing, United Way of Massachusetts Bay*

Michele Levy, *Brand Strategy Consultant*

You've got a new brand for your organization — so how can you make the most of it? Join an interactive and informative discussion of what happens once you have a brand and want to maintain it and maximize its use, regardless of the size of your shop. Hear how two professionals from non-profit organizations — one medium sized and one large — updated their brands and created a more effective communications strategy. And learn how you can apply their successes to your own brand utilization.

WORKSHOP — LIMITED TO 20

Corporations and Foundations

Secrets of Preparing Winning Grant Proposals

Code CF1B

Diane Gedeon-Martin, *President, The Write Source*

Learn how to fine-tune your skills to craft competitive grant proposals and discuss formatting the narrative to get to the point quickly and effectively. This interactive workshop gives participants the opportunity to share their secrets for success and learn from others how they create winning grant proposals. The topics include the ever-changing field of grants and grantmaking; strategically positioning your case for support; tips to write clearly, concisely, comprehensively, and competitively; and presenting meaningful outcomes.

M S **WORKSHOP — LIMITED TO 20**

Session 1 Descriptions

Planned Giving

Estate Administration from A to Z

Code PG1B

Mary Moran, *Director of Planned Giving and Endowment, WGBH Educational Foundation*

You have received a probate court notice about a bequest. Now what should you do? This workshop will present practical steps to ensure that you are receiving the correct amount from probate estates.

all **WORKSHOP — LIMITED TO 20**

Small Shop

The Virtual Office: Managing Your Work Remotely

Code SS1B

Gregg Chambers, *Director of Development, Willow Hill School*

Carolyn Berry Copp, *Executive Director, Boston Classical Orchestra*

Have you thought about accessing files on your computer desktop at work between visits with prospective donors — using your wireless Internet connection on your laptop? Have you considered web-hosted solutions for email campaigns or to maintain your database? What are practical ways to communicate effectively with people when you can't meet face to face? Yes, you can manage your small shop and daily activities from any location with cost effective tools. From web-based database tools to budget-friendly telephone conferencing solutions, you may be surprised at how productive you can be when you are out of the office — even if your organization doesn't have an office!

SS **WORKSHOP — LIMITED TO 20**

Session 2

11:15 am – 12:30 pm

PRESENTATIONS

Advancement Services

Data Integrity: It's Life or Death for Your Shop!

Code AS2

Steven Birnbaum, *Chief Operating Officer, Jacobson Consulting Applications, Inc.*

Jeff Link, *Project Manager, First Church of Christ, Scientist*

Francine Roller, *Director of Development Systems, Children's Hospital Trust*

Ric Waldman, *Director of Marketing, Capitol Center for the Arts*

With the goal of maintaining the complete and accurate donor and prospect data fundamental to effective fundraising, the presenters will give you their perspective on how to create an infrastructure to simplify and improve this vital function. Beginning with the consultant's view of industry best practices for fundraising data management, each presenter will then discuss the real-world challenges they faced while implementing these practices and how they achieved success within their organizations. The discussion will touch upon database management, policy creation, enforcement, reporting, and data screening techniques. Questions about your specific issues are welcome.

all

Annual Fund

Maximizing Market Penetration

Code AF2A

W. Michael Gretschel, *President, Market Development Group*

Learn how a thoughtful selection of mail packages, with and without premiums, can produce digit percent returns. This presentation will use case studies to explain why every mailer who wants to maximize initial prospect response, maximize conversion of new donors to multi donors, and minimize donor attrition should be mailing a broad range of packages.

M

Capital Campaigns

Campaigns for Small Shops

Code CC2A

Molly B. Turlish, *Principal, Molly Turlish Fund-Raising Counsel*

In small shops, development professionals wear many hats and are stretched thin just meeting ongoing needs and goals. Adding a major campaign to the mix can throw even a seasoned professional. Questions addressed include how a consultant can help you focus your energies so both the campaign goals and ongoing needs are met; whether you should argue for additional staff for the campaign; what size budget should you anticipate and where you can find the money to finance the campaign; and who the volunteers are who can make a difference. This interactive session will review the elements of an effective campaign plan including how to gather the resources you need to succeed.

SS all

Communications and Marketing

Special Events: Using Communications to Differentiate Yours from Theirs

Code CM2A

Steven H. Biondolillo, *President, Biondolillo Associates, Inc.*

Claire Murtha, *President and CFO, Event Avenue*

Karen Fosa Salhaney, *Creative Director and CEO, Event Avenue*

Among the biggest challenges in securing donors for non-profits is event planning. From small dinners to big walkathons, we all do events to attract donors. Find out how these presenters who specialize in creating one-of-a-kind events help their non-profit clients use outreach communications and marketing to present events that produce measurable results and have a lasting impact on a campaign. Learn how they use research, positioning, print publicity, advertising, print sponsorship, TV and radio sponsorship, direct marketing, on-line marketing, promotions, and more.

A S

Corporations and Foundations

Tough Times or Smooth Sailing: Latest Trends in Corporate & Foundation Giving

Code CF2

Kathryn R. Bloom, *Director of Communications, Biogen, Inc.*

Nike F. Speltz, *Executive Director, Cabot Family Charitable Trust*

How does the changing economic environment impact corporate and foundation philanthropic giving? During this presentation, you will learn about the impact of "strategic philanthropy" and "cause marketing" on the broad range of not-for-profit organizations and how the changing New England economic environment will change the way not-for-profit agencies do business. You also will receive tips on how best to build personal relationships with funders, and how to build stronger bonds between grant-makers and grantees.

all

Donor Relations

Donor Relations within the Organizational Structures of the Development Office

Code DR2A

Kathryn Battillo, *Vice President for Advancement, Suffolk University*

Joseph Donnelly, *Director of Stewardship, Northeastern University*

Who are donor relations officers? Where do they belong in a development office? Are they fundraisers or do they provide support services? Should they report to the director of development, the director of major gifts, or the director of development services? Learn what a donor relations professional and a top advancement officer think about these questions and join in our discussion.

all

Global Philanthropy

Using PR & Marketing as a Force for Social Change

Code T2

Kelley Chunn, *Principal, Kelley Chunn & Associates*

This session will explore the six principles of effective cause-related marketing in today's diverse marketplace and how to use them to your advantage as a non profit: 1) make a serious long term commitment to a cause that reflects your mission; 2) identify resources through key internal stakeholders to support the campaign; 3) identify partners who share a commitment to the same cause and can provide resources to support the campaign; 4) ensure that the campaign strategy incorporates today's multicultural marketplace; 5) get the message out through the uses of a broad range of communication channels; and 6) measure results for effectiveness.

all

Major Gifts

Engaging the Future with Young Donor Programs

Code MG2

Ina L. Drouin, *Director of Annual Leadership Giving, The Trustees of Reservations*

Julie Williams, *Development Specialist, Historic New England/SPNEA*

Interested in cultivating the next generation? Looking to broaden your constituencies, and to find the future leaders of your organization? Using the challenges and accomplishments of the programs in their shops, the presenters will teach how to develop, cultivate, and sustain a young donor program for your organization. Join this session to learn what other non-profit organizations in New England are doing to cultivate young philanthropists and understand the resources needed to sustain a young donor program.

all

Management

Implications of Sarbanes Oxley for NPOs

Code M2A

Ann E. Berman, *Vice President for Finance and CFO, Harvard University*

Charlotte Davis McGhee, *Vice President, Grenzebach Glier & Associates, Inc.*

Many non-profit institutions have begun to implement procedures following the guidelines established by Congress in Sarbanes Oxley for public companies. In some cases this is in response to trustee concerns based on what is happening in their companies; in other cases it is because the state has passed legislation extending the guidelines to non-profits. This session is designed to provide you with the information to develop a program appropriate for your institution. The discussion will include information about the experience of several institutions, what they have done, plan to do, and the problems they have resolved.

Letting the Other Person Get Your Way

Code M2B

Mitchell A. Gordon, *Chief Advancement Officer, Community Resources for Justice*

Based on the theories developed at the Harvard Program on Negotiation learn to add value through the negotiation process so that you and your donor both win! Learn to understand the donor's interests and help them to understand the interests of your organization. Whether with donors, collaborators, or other constituencies learn the art of "letting the other guy get your way."

all

Planned Giving

Basic Financial Understanding of Planned Gifts

Code PG2

David Routh, *Managing Director, Endowment & Foundation Services, U.S. Trust Company*

What is planned giving? What do you need to know about charitable remainder trusts, charitable lead trusts, retained life interest gifts, and the administration of a planned giving program to be able to communicate planned giving concepts to your prospects, board members, staff, and volunteers effectively? Attend this session to gain an understanding of the financial terms used in planned giving and also learn how finances are being tracked in your department.

all

Small Shop

Managing Board Members and Volunteers

Code SS2A

Lynn Page Flaherty

A strong board and volunteer corps can be essential to the success of a small shop. This session will discuss how to use volunteers and board members effectively including what structures to put into place to determine skill sets; track volunteers; and acknowledge them.

SS

WORKSHOPS

Annual Fund

Cost Effective Donor Stewardship Strategies

Code AF2B

Denella J. Clark, *Senior Vice President and Chief Development & Communications Officer, Dimock Community Health Center*

This presentation will give participants cost-effective strategies to conduct successful individual donor stewardship leading towards growing an individual giving program/annual fund. At the heart of the workshop are valuable, real-life examples on direct-mail response, stewardship of individual donors, design and segmentation, lists management, and achieving the desired fundraising goals.

all **WORKSHOP — LIMITED TO 20**

Capital Campaigns

Volunteers: Treasures or Troubles?

Code CC2B

Margaret A. Herrick, *Director, East India Marine Associates, Peabody Essex Museum*

Effective volunteer management can provide a wealth of resources; mismanaged, these resources can be a tremendous burden, consuming valuable time with little contribution to the organizational mission or goals. Servant Leadership is an age-old leadership concept. Using the unique model developed by Shar McBee and described in her book *To Lead Is To Serve*, this workshop will help non-profits increase the number of volunteers, and relate their work to the goals of the organization, and the amount of their financial contributions. New ways to apply "old" information will help you tap into a treasure trove of assets. Previous participants have described this presentation as transformational rather than informational.

all **WORKSHOP — LIMITED TO 20**

Communications and Marketing

Telling Stories to Move Donors Closer to You

Code CM2B

Karin Kiewra, *Associate Director of Communications and Editor, Harvard Public Health Review, Harvard School of Public Health*

Roger Sametz, *President, Sametz Blackstone Associates*

Storytelling is almost as old as the hills. Good stories engage and inform, influence, and move people to think and act — perhaps in a new way. Telling stories can help you build and nurture relationships, connect on both a rational and emotional level, make donors and prospects feel the organization is "home," and demonstrate that funds "invested" deliver results. Learn what makes a compelling story, the different kinds of stories you can tell, how to collect stories, and how to get stories out. Together we'll craft and share verbal and visual stories. Examples will cut across cultural, academic, and research organizations and reveal how stories can help you to connect better with donors, prospects, staff, and board — and work hard to build meaning in your brand.

WORKSHOP — LIMITED TO 20

Donor Relations

Best Practices in Endowment Fund Reporting

Code DR2B

Bonnie Palmer Weeks, *Director of Stewardship, Phillips Exeter Academy*

Endowments are governed by policies which state protocol, such as withdrawal procedure, investment allocation guidelines, and committee membership guidelines. Some of the funds within an endowment have restrictions placed upon them by the donor. During this workshop learn what the best practices are for reporting endowment funds to meet both the requirements and donor expectations.

WORKSHOP — LIMITED TO 20

Small Shop

E-Technology on a Shoestring

Code SS2B

Jay Love, *President, CEO and Co-Founder, eTapestry*

This session explores all the aspects of technology that can aid in the fundraising process. From accounting and e-mail relationship-building to research and websites we'll show you what is out there for free…or close to it.

SS all **WORKSHOP — LIMITED TO 20**

Session 3

2:00 pm – 3:15 pm

PRESENTATIONS

Advancement Services

Charitable Contributions: What You Need to Know but May be Afraid to Ask

Code AS3A

Jocelyn Bishop, *Manager, PricewaterhouseCoopers, LLP*

Kaye Ferriter, *Managing Director, PricewaterhouseCoopers, LLP*

Over the past year, there have been substantial legislative changes and proposed legislative changes in the tax law for non-profit organizations. Some of these changes impact donation considerations, including valuation of non-cash contributions. This presentation will update you on these changes and provide you with another perspective which donors may take into consideration.

all

Capital Campaigns

Using Capital Campaigns to Grow Annual Giving

Code CC3

Carey Bloomfield, *Vice President & Managing Director, Grenzebach Glier & Associates, Inc.*

Charlotte McGhee, *Vice President, Grenzebach Glier & Associates, Inc.*

When a large campaign is undertaken, there is often fear that annual giving will suffer. Will top annual donors choose to support the campaign at the expense of annual giving? Will loyal smaller donors feel irrelevant? How can organizations prepare and use a campaign to increase annual giving, not threaten it? This session will offer practical tips for effective campaign planning, volunteer and staff training, campaign reporting, and stewardship to help ensure that your annual giving program not only is sustained during a campaign, but that it thrives and grows.

M A

Communications and Marketing

Taming Your Wild and Woolly Website

Code CM3A

Sarah Durham, *Principal, Big Duck Studio*

The presenter, whose company helps non-profits communicate more effectively, will identify best practices you can use to upgrade your organization's website. She'll cover site design and architecture (ease of use), online fundraising and donor cultivation, and integration with your offline communications. She will also conduct an interactive critique of 3–5 websites submitted in advance by conference attendees. If you would like to submit your site for this session, please email a link to the site plus your name and phone number to sarah@bigduckstudio.com no later than November 10, 2005.

Online Fundraising Auctions: New Revenue, Better Advocacy

Code CM3B

Greg McHale, *Founder and Executive Vice President, cMarket, Inc.*

The presenter will discuss the adoption of the Internet as a growing fundraising medium, with a specific emphasis on using online auctions to generate fundraising revenue, better engage constituents and members, and brand your organization or cause. You will gain a better understanding of the many online fundraising opportunities available; learn how to determine the criteria for a successful online auction program; and discover some best practices that are proven to generate positive auction outcomes.

all

Corporations and Foundations

Services & Volunteers: Securing In-Kind Donations

Code CF3A

Judith G.H. Edington, Esq., *Attorney, Sullivan & Worcester*

Cash gifts are only a portion of businesses' and corporations' overall contributions to non-profits. Companies are donating the time of the staff and executives, and giving valuable products and services to non-profits either as direct services or for resale through charitable auctions and other means. Find out how businesses decide which non-profits receive their in-kind donations and what you can do to maximize their participation in your non-profit.

SS

Donor Relations

Donor Relations and Management of the Endowment

Code DR3A

S. Catherine Longley, *Senior Vice President for Finance and Administration & Treasurer, Bowdoin College*

Scott Meiklejohn, *Assistant to the President and Vice President for Planning and Institutional Advancement, Bowdoin College*

Institutional accountability to donors regarding the use of their gifts and endowment fund income is the core of stewardship and donor relations. This session will focus on a team approach that can be taken to ensure that endowment income is, in fact, expended in full and in accordance with the wishes and expectations of the donors. The presenters will examine the role of development officers, the finance office, fund managers, and donor relations in this process. The donor's perspective also will be presented during the review of financial reporting standards and practices, and donor expectations. The session will provide suggested procedures to revise the terms of overly restrictive endowment funds.

SS M S

Global Philanthropy

The Challenge of Thinking Globally While Acting Locally

Code T3A

Steve Grossman, *President, MassEnvelopePlus*

Barry Shrage, *President, Combined Jewish Philanthropies*

During this session, learn how the organized Jewish community responds to overseas needs while maintaining a commitment to strengthen the core of the local Jewish community.

all

Mass Media: Your Link to the World

Code T3B

Beth Healey, *Reporter, Spotlight Team, Boston Globe*

Paul LaCamera, *President and General Manager, WCVB-TV*

Gail Snowden, *Vice President for Finance Operations, The Boston Foundation*

As a development professional, some of your most important external constituents are representatives of the mass media. Indeed, the non-profit world is of increasing interest to the media — nearly every day, we learn of legal, financial, and mission-related issues that affect our local philanthropic scene. Should your organization be interacting assertively with the media? Can newspaper, TV, radio and other outlets help communicate the urgency of your mission and expand your constituent base? In this session, non-profit and media professionals discuss ways to keep on top of national and local events that affect philanthropy and explore ways to cement a mutually productive relationship.

all

Major Gifts

Understanding Family Foundation Dynamics: Structure and Decision

Code MG3A

Jason Born, *Senior Program Director, National Center for Family Philanthropy*

Amy Zell Ellsworth, *Board President, Zell Family Foundation*

Fred Wang

Family foundations blend individual proclivities and foundation formality. Each family foundation is unique in its character and gift decision-making process. This panel will discuss underlying issues and dynamics at work within a family foundation and important elements to consider in developing gift approaches and strategies.

all

Obtaining Major Gifts through Direct Mail

Code MG3B

Les Gordon, *President, Direct Response Solutions*

Direct mail is probably the worst (least effective) method you can use to obtain major gifts for your non-profit organization. But what do you do when there is no other fundraising method available to obtain major gifts and they are still urgently needed? This presentation will demonstrate how you can use direct mail as a last resort to solicit and obtain major gifts ($1000+) when the only other alternative is to not solicit these prospects/donors at all. Emphasis will be placed on major gift prospect identification through file analysis and outside list screening, letter copy development, and the creation of leadership gift clubs.

all

Planned Giving

Opening on Broadway: The Two Faces of the Big Ask

Code PG3

John J. Brown, *President, John Brown Limited, Inc.*

This original melodrama depicts the pitfalls and opportunities of face-to-face solicitation. In the first act, the speaker will show the consequences of the big ask that follows one pattern of cultivation. In the second act, the same solicitation but in the context of a very different pattern of engagement.

M S

Small Shop

Planning for Success in a Small Shop

Code SS3A

Jane Ford, CFRE, *Principal, Ford Scott Associates*

Al Scott, *Principal, Ford Scott Associates*

Although it seems as if there is never time to plan in a small shop, actually doing the planning saves time and increases your resources. The focus will be on developing a useful, one year resource development plan based on the strategic goals of your organization and creating a diversified funding base to meet those goals. Participants will leave this session understanding the relationship between a strategic plan and a resource development plan and have a simple system for developing a one year plan to raise funds to support your organization's mission.

SS

WORKSHOPS

Advancement Services

A Structured, Organized Process for Selecting a Fundraising System

Code AS3B

Robert Zuckernik, *President and Founder, QBZ Consulting*

Selecting the best fundraising system for your organization is one of the most important (and challenging) projects your organization will undertake. An effective methodology to determine your goals for a new system encompasses analyzing your system requirements including "scalability" (what makes sense for your size, timeframe, and budget), issuing requests for information and for proposals (RFIs and RFPs), systematically evaluating vendors and products, and making a sound choice based on objective results with maximum buy-in within your organization. Although our focus will be on evaluating systems and choosing the best one, we will also discuss some fundamentals of implementation and data conversion.

all **WORKSHOP — LIMITED TO 20**

Corporations and Foundations

Foundation Proposal Writing

Code CF3B

Luanne M. Kirwin, *Senior Development Officer, Phillips Academy Andover*

Robert Silk, *Director of Development and Alumni Relations, Harvard School of Dental Medicine*

The world of foundation fundraising becomes more competitive every year with new charities, greater needs, and more grant-seeking development officers. While it is only one facet of the grantee/foundation relationship, the written proposal represents the applicant, its mission, and its activities. How can a proposal stand out among so many others? How does it fit within a successful grantee/foundation relationship? How is the role of the proposal writer changing? Join a discussion to share ideas on what works, what does not work, and what writers are exploring in their efforts to hold onto hard-to-get foundation support.

all **WORKSHOP — LIMITED TO 20**

Donor Relations

Parties, Presents, and Plaques

Code DR3B

Sara K. Fisher, *Donor Relations Officer, Dartmouth-Hitchcock Medical Center*

Lindsay G. Koenig, *Assistant Director, Events, Dartmouth-Hitchcock Medical Center*

This will be an interactive workshop to share ideas and experiences with donor recognition. Bring your stories, resources, and questions regarding creative donor recognition events, event mementos, donor walls, named space plaques, gifts for donors, and vendor information to exchange with your colleagues.

all **WORKSHOP — LIMITED TO 20**

Management

Being Present

Code M3

Mitchell A. Gordon, *Chief Advancement Officer, Community Resources for Justice*

We work so hard and so fast that we rarely take time to reflect. When the pressure is really on are we really present or just going through the motions? Through techniques of meditation, mindfulness, and awareness you can be more effective in your work and more present for your donors, colleagues, and yourself.

all WORKSHOP — LIMITED TO 20

Small Shop

The Few, The Proud, The Solicitors: How to Feel Comfortable Making the Ask

Code SS3B

Tanya Holton, *Vice President for Development, National Braille Press*

It is easy to hide behind our desks and coordinate solicitation efforts. Inspiring donors to give without having to ask them face-to-face is an art form, but at some point in our careers we need to learn how to make the ask ourselves. Join this workshop to discuss how to be confident professionals who know how to inspire donors to give; evaluate specific tools of the trade including strategies to move donors up the pyramid; how to create special giving opportunities; how to schedule solicitation appointments; how to choose the best solicitation partner; what goes into the written case and the verbal script; and how to respond to a 'no.'

SS E M WORKSHOP — LIMITED TO 20

Session 4

3:45 pm – 5:00 pm

PRESENTATIONS

Advancement Services

Embarking on Data Modeling: Building an In-House Major Gifts Prospecting Tool

Code AS4

Rob Scott, *Director, Development Research and Systems, MIT*

With the goal of improving prospecting yields, hear how MIT conceptualized, built, and made the case for a descriptive data mining and predictive modeling project. Topics will include the resources to support it, how the project was communicated to the internal clients, how it was tested and refined, and how the research field staff use it to prioritize and develop a major gift prospect pool within a larger group of potential donors.

all

Annual Fund

Strategies for Moving High-End Annual Fund Donors Up the Ladder

Code AF4A

Megan Abbett, *Director of Donor Relations, Simmons College*

This interactive session will address how to steward your annual donors in their philanthropic journey with your institution. You will discuss communication strategies aimed at increasing interest in your organization, how to use donor events effectively to engage your prospects, how to work with major gift officers as you move your prospects through the pipeline, and how to be creative with funding opportunities to help annual donors become leadership donors. This session will provide you with the opportunity to examine your own program while gaining exposure to ideas that have been successful at other institutions.

all

Capital Campaigns

Human Dimension of Campaigns: Beating the Odds with Optimism

Code CC4

Mary Lou Krambeer, *Principal, MLK & Company*

Angela Matthews, *Director of Development, Plymouth State University*

Wallace Stevens, *Chair of Board, Plymouth State University*

A consultant, a volunteer, and a staff member with the same goal share their differing roles and perspectives of a successful campaign. Using a Q & A format, each presenter will address the importance of optimism and the way in which each team member met his or her responsibility in context of the campaign. They will cite specific examples and present a process model which will

provide ideas for effective roles and tasks for volunteers, how to maintain progress toward goals, and strategies to support a successful campaign.

all

Communications and Marketing

Expanding the Donor Pool: Lessons From the Business World

Code CM4

John J. Brown, *President, John Brown Limited, Inc.*

Jay Goulart, *Director of Development, Proctor Academy*

Julie Fitzpatrick Rafferty, *Director of Development Communications, Harvard School of Public Health*

Non-profits such as colleges and hospitals have what are known as "natural" donor constituencies — successful alumnae or wealthy grateful patients, for example, who are obvious potential sources of support. But what about charities that don't have a steady stream of high-net-worth individuals from which to draw? Many a business has targeted strategies for identifying high-end customers and winning their loyalty. What can fundraisers learn from these successful marketeers?

Corporations and Foundations

Match.coz — Making the Perfect Match

Code CF4A

David Giagrando, *Director of Cause Marketing, The Jimmy Fund/Dana-Farber Cancer Institute*

Match.com has been the catalyst for many successful relationships. In this session, *match.coz* gives a background to the concept of cause marketing and the challenges and opportunities that lie ahead for non-profits and companies engaging in these relationships. As in all matches, the goal is to create the best win-win relationship by meeting your own needs as well as those of a potentially demanding partner. In this session, case studies will be presented and attendees will have ample opportunity for sharing and asking questions.

all

Working with Sports Foundations

Code CF4B

Paul Stewart, *Director of Development, Boston Bruins Foundation*

Meg Vaillancourt, *Senior Vice President of Corporate Relations and Executive Director, Red Sox Foundation*

This panel discussion will reveal what types of projects interest sports foundations, how they should be approached, and what they expect. If your organization has ever wondered what the foundations of the major sporting teams in Boston use as criteria to support a local charity, this is your opportunity to find out.

all

Donor Relations

Luminous Liaisons: Value-Added Stewardship Partnerships in the Development Office

Code DR4

Joseph Donnelly, *Director of Stewardship, Northeastern University*

Diana M. Elvins, *Director of Donor Relations, Williams College*

Elizabeth Roberts, *Secretary of the Academy, Phillips Academy*

Stewardship and donor relations programs that are in full partnership with other development fundraising programs (annual fund, planned giving, major gifts) create a richer dimension of cultivation, recognition, and long-term care of significant donors. Explore what those partnerships can look like, how they work, and why they are valuable to development staff and donors alike.

all

Global Philanthropy

Red State/Blue State: Mining Political Contributors for Philanthropy

Code T4

David Chase, *President, Chase Solutions, Inc.*

It's a new world – a world that says "yes" to the question as to whether the philanthropic sector can benefit from the political schisms in America. Join us as we explore ways in which philanthropic organizations can identify the wealthy political contributors most likely to support its mission through identifying the prospects' donations to other causes. Are supporters of conservative causes and candidates more likely to support religious education? Are donors to liberal PACs more likely to support human service agencies? Who gives to the politicians closely aligned with your organization? How to acquire lists of political donors and strategies to electronically screen your constituent database for these high-level political givers will be discussed. Participants will receive a valuable resource list to pursue implementation strategies.

all

Major Gifts

The Inside Story: How Women Philanthropists are Making a Difference

Code MG4A

Lauren Ackerman, *Philanthropist*

Karen Keating Ansara, *Co-Founder, Ansara Family Foundation*

Nancy Brimhall, *President, Brimhall & Associates*

Women have emerged as a driving force in American philanthropy. You will hear from experienced philanthropists about how their unique voices create change in the organizations they support and why their donor perspectives challenge us all to be better fundraisers and philanthropists. Learn to shape your approaches to women prospects so that you respond to their needs and hear them talk about why "their gender and life experiences have given them a unique lens through which they view, assess, and contribute." Find out why giving circles are proving to be successful "philanthropy incubators" and how to attract their interest. Learn from the experience of powerful philanthropists who know what makes them responsive to your message and your mission.

all

Management

Helping Your Program in Leadership Transition

Code M4A

Kassandra D. Jolley, *Assistant Vice President, Simmons College*

Marjorie E. O'Malley, *Assistant Vice President, Berklee College of Music*

Change is constant in the development field and yet we understate the tools needed for development programs to thrive when a chief executive officer changes. This session examines how to position your development program to thrive, not just survive, during a leadership change. The speakers will discuss strategies to address staff fear of change, how to keep your development program flexible and nimble, the importance of a comprehensive plan, how and when to deal with external constituencies, and the importance of assuming a leadership role during a transition. They also will address explaining development to a new chief executive officer and developing strong and sustainable relationships with new chief executive officers.

Legal Landscape — What You Need to Know

Code M4B

Richard C. Allen, Esq., *Principal, Casner & Edwards, LLP*

There is more to running a non-profit than raising dollars and providing services. The staff and board of directors is subject to the laws of the states in which they fund raise. The legal landscape is continually changing… are you clear on what regulations exist regarding UBIT; registering for soliciting funds online; or duties and liabilities of directors? The presenter will provide insight on these issues and other current Massachusetts regulations.

Planned Giving

Gift Planning Overview

Code PG4A

Jeff Lydenberg, *Vice President, PG Calc*

This talk will give an overview of the gift planning process. We will start with the charitable income tax deduction, the cornerstone of incentives for charitable deduction. What is the deduction? How does it save the donor money and what are the limitations on its use? Next we will review the different planned gift vehicles including life income gifts, gifts of property and lead trusts. You will be able to identify the features of each gift type as well as recognize which planned gift might be appropriate for your prospect. This session will be a good review if you have been away from gift planning for awhile and a gentle introduction to planned gift techniques if you are new to the field.

all

Small Shop

One Fish, Two Fish, Reeling in the Big Fish: Making a Major Gifts Program Thrive in a Small Shop

Code SS4A

Tamar Lewis, *Director of Major Gifts, Greater Boston Legal Services*

Daniel J. Watt, *Director of Development, Carey Memorial Library Foundation, Inc.*

Come share the thrills and chills of small shop life, where today you make the coffee, tomorrow you welcome the president. Incorporating basic information, elementary survival tips, and stories of inspiration and perspiration, this interactive session will focus on how to make a major gifts program a priority in your shop. Issues include using clever ideas to push your program forward; the perpetual struggle to make major gifts a priority and maximize return with limited resources; getting the most out of your human capital; and the secret incantation to closing the major gift. Bring your questions, comments, and tales of woe and intrigue.

SS M

WORKSHOPS

Annual Fund

Impacting Workplace Giving

Code AF4B

Maxine Neil, *Associate Director of Annual Giving, Dana-Farber Cancer Institute*

When we think of workplace giving we typically think of the United Way campaigns. Your organization can take what is sometimes a very static program for many organizations, and turn it into something extremely dynamic. This workshop will share ideas and strategies to help enhance your program if you have one, or launch one. You will leave with tangible tools to help increase your revenue from one of the underpinning programs of the annual fund.

all WORKSHOP — LIMITED TO 20

Major Gifts

Be Careful What You Wish For: Navigating, Managing, and Promoting Campaign Challenges

Code MG4B

Michele Mann, *Campaign Director, St. John's Church*

Tracey Merrill, *Consultant, Jaques & Company, Inc.*

A well-constructed campaign challenge can be an effective way to create momentum, strengthen the case for support, and leverage giving, especially at the top of the gift pyramid. Not all challenges are created equal, however. Knowing how to navigate the pitfalls of this important strategic tool is essential to establishing a credible, useful challenge that will motivate and energize prospects. While reviewing case studies of a real campaign, attendees will see how the challenge concept fits as part of an overall campaign strategy and examine the practical issues along with the benefits and drawbacks.

M A WORKSHOP — LIMITED TO 20

Planned Giving

Planned Giving Marketing: Notes from the Field

Code PG4B

Lauren Bellon, *Gift Planning Coordinator, Tufts University*

Meredith Johnson, *Director of Planned Giving, The Salvation Army*

Betsy Watson, *Manager of Planned Giving, Massachusetts Audubon Society*

Susan Young, *Assistant Director of Gift Planning, Lahey Clinic*

How can you best use your marketing budget? This workshop features a panel from medical, higher education, human services and environmental non-profit organizations who will discuss some of the strategies and tools that they have found are effective uses of their marketing budgets.

all WORKSHOP — LIMITED TO 20

Small Shop

Prospect Research and Its Role in "The Ask"

Code SS4B

Susan Cronin Ruderman, *Vice President, Veritas Information Services*

The broad reach of the Internet has brought prospect research within the grasp of organizations of all sizes, but the challenge for fundraisers in small shops is getting the information in a timely manner. The focus will be on quickly identifying free and low cost information points that address a prospect's capacity and inclination and how to translate that research into a solicitation goal and strategy to create an effective ask. You will leave with a list of essential websites and techniques for making your prospect research systematic and time effective.

SS M A WORKSHOP —LIMITED TO 20

Luncheon Roundtables

Luncheon Roundtables offer a particular opportunity for conference attendees to participate in conversations focused around specific fundraising topics. Other lunchtime options include the mentoring program (see page 27) or open seating for networking with peers in University Hall, third floor.

The roundtable topics attempt to reflect today's development world, and the facilitator for each roundtable works to mold the discussion to the interests of their participants. Over the years we have found those who benefit most are from small- to mid-sized shops.

Each table is limited to ten (10) participants including the facilitator. This year we will again pre-register so that we can match the number of tables to meet demand. Please indicate your 1st and 2nd choices on the registration form. Topic choices will be assigned on a first-come, first-serve basis. Historically, roundtables sell out quickly, so please register now. **There will be no roundtable sign ups on the day of the conference.**

2005 ROUNDTABLE TOPICS

Board Development

Code RBD1
Developing Board Leaders

Code RBD2
Involving Board Members in Fundraising

Capital Campaigns

Code RCC1
Initial Steps for Small- to Mid-Sized Shops

Career Issues

Code RC1
Challenges as You Enter the Development Profession

Code RC2
Advancing Your Career in Development

Code RC3
Navigating the Competing Priorities of Family and Work

Corporate and Foundation Grants

Code RCF1
Identification and Research

Code RCF2
Crafting the Case

Solicitation by Mail

Code RDM1
Crafting an Effective Message

Diversity

Code RD1
Hiring and Retaining a Diverse Development Staff

Code RD2
Building a Diverse Donor Base

Code RD3
Sisters In Development Network

Donor and Prospect Research

Code RR1
Using All Sources to Research Individuals

Major Gifts

Code RMG1
Securing Larger Annual Gifts through Leadership Giving Programs

Code RMG2
Creating Gifts over $25,000

Planned Giving

Code PRG1
Starting a Planned Giving Program in a Small- to Mid-Sized Shop

Small Shop

Code RSS1
Managing the Small, Yet Effective, Development Office

Special Events

Code RSE1
Event Sponsorships

Code RSE2
The Key Elements of a Successful Event

Additional Information

PRESIDENT'S RECEPTION

Take a moment at the end of the day to relax, have a refreshment, and network with your colleagues at the President's Reception. The reception will held be from 5:00 pm to 6:30 pm. A raffle for prizes donated by the Resource Providers also will take place at the reception. You must be present to win.

SCHOLARSHIPS

Scholarships to the 2005 Conference on Philanthropy are available. Contact the AFP, Massachusetts Chapter at 781.397.8870 for a scholarship application or download an application from our website (www.afpmass.org). **Scholarship applications must be postmarked no later than October 28, 2005 to be considered.** If you are applying for a scholarship, please return your registration form to the Chapter office as soon as possible so that you will receive your program choices. Those who apply for a scholarship but do not receive one, will be given the option to pay for the conference or cancel in writing at no charge.

VISIT THE WIRED DEVELOPMENT OFFICE IN THE RESOURCE HALL

Let the Wired Development Office connect you to the best development and technology links the Internet has to offer. Surf the web for foundation and grant-making sites, discover innovative computer and development systems information, or springboard to resources galore.

VOLUNTEER

The Conference on Philanthropy is volunteerism at its best. The Chapter greatly appreciates all the time donated by AFP members and others in planning and on the day of the Conference. You can help, as well! A variety of volunteer jobs await your leadership on conference day to ensure that the event runs smoothly. We are unable, due to the fixed costs associated with the conference, to make adjustments to the registration fees for regular volunteers who will not miss sessions/workshops. However, by volunteering you can help defray the overall costs of the conference.

The Ambassador's Club provides the opportunity for a select number of conference attendees to assist with day of conference logistics at a reduced registration fee*. Duties may include working in the Conference registration area and/or managing the volunteer check-in room. A member of the volunteer committee will contact you to determine scheduling and availability. Ambassador Club members will be chosen on a first-come, first-served basis. Please check off the appropriate box on the registration form to indicate your interest or call the Chapter office. Please note that all volunteers must be registered for the conference and have paid in advance according to the registration guidelines.

**Ambassador Club responsibilities will limit participation in at least one educational session/workshop. Due to this limit, Ambassador's Club members will receive a 20 percent refund of the registration fee after the conference.*

INTENSIVE FUNDRAISING BASICS COURSE

On Tuesday, November 29th, the day before the Conference, the Massachusetts Chapter will hold the Intensive Fundraising BASICS Course. This course is designed for those who have less than two years of professional experience in development, and is taught by practicing professionals. BASICS attendees also must register for the conference. Please contact the AFP, Massachusetts Chapter for information and a **separate** registration form at 781.397.8870 or download it from our website, www.afpmass.org.

CAREER FAIR

On Tuesday, November 29th, the day before the Conference, the Massachusetts Chapter will hold a Career Fair for those interested in getting into development as well as those who are looking to refine their skills. The topics will include "Personal Perspectives From a Career in Fundraising"; "Management Basics"; and "Do I Want to Be a Fundraiser When I Grow Up?", followed by roundtables which will explore these topics more in depth. Please contact the AFP, Massachusetts Chapter for information and a **separate** registration form at 781.397.8870 or download it from our website, www.afpmass.org.

Become Involved in AFP, Massachusetts Chapter

Seasoned professionals know the value of participation in a professional association. **The Association of Fundraising Professionals** is a local and international source of information and services to enhance and advance your career. Members and Subscribers attend monthly presentations, informal brown bag lunches, the annual conference, and other programs at discounted rates. *See the registration page to find out how much you can save on your registration to this conference by joining.* If you are not a Member or Subscriber, it is very simple to register and join AFP at the same time. **(Note: Membership and Subscriber status is by individual and not by organization.)**

Member ($280) — Members enjoy all the privileges of the Massachusetts Chapter as well as of the International AFP. Members may vote on international issues, have access to resources available through the international office such as research support and information on philanthropy (including legislative updates), receive an invitation to the international conference, and are listed in the online membership directory. Mid-career and senior professionals are encouraged to join at this level.

Subscriber ($100) — Subscriber status is offered by the Massachusetts Chapter of AFP to newcomers to fundraising and those in small shops. Subscriber status may not exceed two years and Members may not renew as *Subscribers unless they have been inactive for more than two years. Subscribers are not entitled to any of the International AFP benefits.*

MENTORING PROGRAM

Remember receiving great advice when you first started in development? If you have had five or more years of development experience and feel comfortable listening and helping a colleague who's newer to the field, we need you to be a mentor the day of the conference.

Or, are you feeling overwhelmed with your first fundraising job, new responsibilities, or work overload? Those of you who are newer to the field and could benefit from some wise counsel, are invited to sign up to have a mentor.

The mentoring program is a limited opportunity during lunch at the conference. **Space is limited and mentoring assignments will be made on a first-come, first-served basis.** *Please check the appropriate mentoring box on the registration form.*

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Association of Fundraising Professionals, Massachusetts Chapter

Registration Information

Please fill out the registration form completely. Incomplete forms or forms without checks may be returned. Please type or clearly print your information. You may also register online at www.afpmass.org using a credit card.

Pre-registration is required for all presentations and workshops. **You MUST indicate five choices.** Presentations and workshops will be filled on a first-come, first-served basis in the order of receipt of PAID registration forms. **The conference is expected to sell out.**

One form should be used for each registration. You may make copies of the registration form if you need additional registration forms.

Luncheon Roundtables always sell out quickly. If you are interested in participating in a luncheon roundtable, please indicate your choices on the registration form. **You MUST indicate 2 choices.** Roundtables will be filled on a first-come, first-served basis in the order in which the registration form is received.

Return the form with check or money order payable to "AFP, Massachusetts Chapter" and mail to AFP, Massachusetts Chapter, 389 Main Street, Suite 202, Malden, MA 02148. Questions? Call 781.397.8870.

Confirmation will be sent upon receipt of registrations received prior to **November 11, 2005.**

CANCELLATION POLICY

Cancellation refund requests must be received *IN WRITING* and **postmarked by November 1, 2005**. *All cancellations regardless of payment status will be subject to a $40 cancellation fee.* Requests postmarked after that date will be credited toward next year's conference, less the $40 cancellation fee.
No cancellations will be accepted after November 11, 2005.

ROOM RESERVATIONS

A block of rooms is reserved for November 29th and November 30th ($249 per night) for conference attendees at the Marriott Copley Place, Boston. Make your reservation directly by calling 617.578.0632 or 800.228.9290. Reservations must be made by **November 7, 2005** and you must specify that you are with "AFP" to receive the discounted rate. If you have any problems, please call the Chapter office at 781.397.8870. Other rooms at nearby locations are available through Boston Reservations at 617.332.4199 and also through the Bed and Breakfast Agency of Boston at 800.248.9262.

DIRECTIONS TO THE MARRIOTT COPLEY PLACE BOSTON

From the West: Go east on the Massachusetts Turnpike, Route 90. Take the Copley Square exit which leads onto Stuart Street and turn left at the first traffic light onto Dartmouth Street. At the next traffic light turn left onto Huntington Avenue and stay in the left lane. At the traffic light under the skybridge make a u-turn to the left. The hotel is on the right.

From the North: Go south on Routes 93 or 1. Take the Storrow Drive exit off of Route 93 (Exit 26) and go west for a half-mile. Take the Copley Square exit, which is a left exit. Turn right at first light onto Beacon Street. After four blocks turn left onto Exeter Street. After six lights the street ends on Huntington Avenue. The hotel is directly across the street. Follow the signs for hotel parking.

From the South: Go north on Routes 3 or 93. Take the Massachusetts Avenue/Roxbury exit off of Route 93 (Exit 18). Turn right onto Massachusetts Avenue. At the eighth light (you will see Symphony Hall across the street) turn right onto Huntington Avenue. The hotel is on your right after the third light.

From the Airport: Follow the signs for Boston/Sumner Tunnel. Stay in left lane through tunnel. Go north on Route 93. Take the Storrow Drive exit and follow the above directions for "From the North."

By Public Transportation: Orange Line to Back Bay **OR** Green Line to Copley **OR** Commuter Rail to Back Bay

Parking: Enter the Marriott driveway where you will see the entrance to the Copley Place garage. Other garages are located on Huntington, Stuart, and Dartmouth streets. **The Chapter does not validate parking.**

Registration Form

Please read registration information carefully before completing this form. *Please print.*

Name ______________________________

Title ______________________________

Organization ______________________________

Address ______________________________

City ______________ State ______ Zip ________

Phone ______________ Fax ______________

Email ______________________________

Are you an AFP Member ☐ Yes ☐ No

If yes, which chapter? ☐ Mass. ☐ Other __________

Joining as a Member or Subscriber now will entitle you to a discounted conference rate. Please see page 27 for more details.

Type of Organization *(please circle one)*

A. Arts/Cultural
B. Consultant
C. Education
D. Environmental
E. Health Care
F. Religion
G. Social/Community Services
H. Other __________

Size of Development Staff *(please circle one)*

A. 1–3 B. 4–6 C. 7–9 D. 10+

Amount Raised Annually *(please circle one)*

A. Up to $250,000
B. $250,001–$1,000,000
C. $1,000,001–$5,000,000
D. Over $5,000,000

Annual Budget *(please circle one)*

A. Up to $250,000
B. $250,001–$1,000,000
C. $1,000,001–$5,000,000
D. Over $5,000,000

In Development Since *(year)* ______________

TUITION RATES

Registrations postmarked by Oct. 17, 2005

Members/Subscribers . . . $199.00
*Groups (3–9). $249.00
Non-Members $300.00

*Registrations postmarked between Oct. 18 and Nov. 12, 2005***

Members. $225.00
Subscribers $245.00
Non-Members $330.00

*Registrations postmarked after Nov. 12, 2005 or at the door***

Members $280.00
Subscribers $295.00
Non-Members $385.00

* *Must be from the same organization and forms submitted together prior to Oct. 17, 2005. Rate is per person.*

** *If space is available, please call first or check our website (www.afpmass.org)*

For Office Use Only Date Received __________
Check No. ________ Amount ________

CONFERENCE REGISTRATION

Please list **five** (5) choices by **CODES** with 1 being your first choice. Due to limited space you *must* list alternative selections in case of a close out. Availability of sessions is **NOT** guaranteed. *Please print.*

Session 1 9:30 am–10:45 am

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________

Session 2 11:15 am–12:30 pm

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________

Session 3 2:00 pm–3:15 pm

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________

Session 4 3:45 pm–5:00 pm

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________

REGISTRATION

Tuition *(by date of postmark)*

☐ Member $__________
☐ Subscriber $__________
☐ Non-Member $__________

Joining AFP, Massachusetts Chapter *(see page 27)*

☐ Subscriber ($100) $__________
☐ Member ($280) $__________

I would like to donate to the conference scholarship fund (any amount) $__________

Total Enclosed $__________

If you are interested in a luncheon roundtable, please list **two** (2) choices by **CODES** with 1 being your first choice. Due to limited space, you *must* list an alternative selection in case of a close out. Availability of roundtables is **NOT** guaranteed.

1. ______________ 2. ______________

Please check all that apply:

☐ Please send information on the **CAREER FAIR** *(page 26)*.
☐ Please send information on the **INTENSIVE FUNDRAISING BASICS COURSE** *(page 26)*.
☐ Please sign me up to **BE A MENTOR** *(page 27)*.
☐ Please sign me up to **HAVE A MENTOR** *(page 27)*.
☐ Contact me about **CONFERENCE VOLUNTEER OPPORTUNITIES** *(page 26)*.
☐ Contact me about **AMBASSADOR'S CLUB VOLUNTEER OPPORTUNITIES** *(page 26)*.

Checks should be made payable to: AFP, Massachusetts Chapter.
Mail checks with registration form to: AFP, Massachusetts Chapter
389 Main Street, Suite 202, Malden, MA 02148.
Or you may register online with a credit card at www.afpmass.org.