



Welcome to Rural Philanthropy Days!

This document is designed to help you plan your Wednesday afternoon by choosing sessions relevant to your own professional development needs and to the current capacity building needs of your organization.

If you have questions about any of these sessions or about registration, please contact me at the information below.

Thank you very much! We look forward to seeing you in June!

Amy Shellenberger

Amy Shellenberger
Western Slope Rural Philanthropy Days Coordinator

970.497.2826

coordinator@westernrpd.org

Wednesday, June 17 Capacity Building Session Schedule

Capacity Building Session 1 (12:00 noon to 1:30 pm)		Capacity Building Session 2 (1:45 pm to 3:15 pm)		Capacity Building Session 3 (3:30 pm to 5:00 pm)	
#	Topic	#	Topic	#	Topic
1a	Building Your Donor Base using E-Philanthropy Strategies Presenter to be determined	2a	Fundraising in Challenging Times Presenter: Illene Roggensack, Third Sector Innovations	3a	Nonprofit Survival Guide Presenter: Jeff Pryor, Anschutz Family Foundation
1b	Fundraising for Long Term Sustainability – Planned Giving and Endowments Presenters: Jack Alexander, Helen K. and Arthur E. Johnson Foundation and Dan Harris, Wells Fargo	2b	Planning and Preparation for Capital Campaigns Presenter: Lisa Flores, Gates Family Foundation	3b	Advanced Strategies for Capital Project Success: Roundtable Discussions with Capital Funders Presenter: Katie Kramer, Boettcher Foundation plus other private and governmental funders
1c	Applying Small Business Practices to Your Nonprofit for Enhanced Sustainability Presenter: Marilyn Laverty, Western State College	2c	Key Strategies for Effective Financial Management Presenters: Kelleen Zubick, Community Resource Center and Colorado Nonprofit Association staff	3c	Advanced Financial Management Strategies for Uncertain Times Note: Session limited to executive directors, finance staff, and board leadership with at least a moderate level of financial management experience Presenter: Susan Steele, Temple Hoyne Buell Foundation
1d	Maintaining Morale, Making Cuts, and Other HR Issues for Times of Crisis Presenter to be determined	2d	Keep Yourself Out of Jail: Legal Requirements and Ethical Issues for Nonprofits Presenters: April Montgomery, Telluride Foundation and Luke Danielson, Attorney	3d	Evaluation - Measuring and Reporting your Success Presenters: Rebecca Larson, OMNI Institute and Alexis Weightman, Colorado Health Foundation
1e	Advancing Leadership through Assessment – Executive Director Reviews and Board Self-Assessment Strategies Presenters: Don Wills, Gunnison Area Restorative Practices and Sarah Fischler, Community Resource Center	2e	Maintaining Your Passion during Stressful Times Presenter: Mark Ewing, Community Foundation of the Gunnison Valley	3e	Myers-Briggs: Helping Develop Your Leadership Style by Understanding Your Personality Traits Note: Additional \$25 fee applies. Participants will complete the MBTI in advance and <u>must</u> be present to receive results. Presenter: Cathy Robbins, El Pomar Foundation
1f	ConnectWorking: Networking For Success in a Changing World Presenter: Elaine Brett, Black Canyon Land Trust and Western Colorado Food and Agriculture Council	2f	Social Media for Nonprofit Organizations Presenters: Sarah Fischler and Lauren Price, Community Resource Center	3f	Community Engagement Strategies: Inclusiveness and Outreach Presenters: Benito Cardenas, One Telluride and Community Resource Center staff

Wednesday, June 17, 2009

Registration starts at 11:00 am

FIRST TRACK OF CAPACITY-BUILDING SESSIONS

12:00 noon to 1:30 pm

Session 1a: Building Your Donor Base through E-Philanthropy Strategies

This session will focus on strategies to build your donor base through e-philanthropy and will include an overview of how to develop an online giving program, the importance of having a strong online presence, and a discussion about donor engagement strategies. Profiles of organizations successfully utilizing e-philanthropy strategies will be included.

Presenter to be determined.

Session 1b: Fundraising for Long-Term Sustainability: Planned Giving and Endowments

Through this session, you will learn about two essential fundraising strategies for organization sustainability and fundraising diversification: planned giving and building an endowment. The session will cover the basic elements of each of these strategies, some tips on determining if your organization is ready to develop and commit to a developing an endowment or planned giving program, and the basics of getting started with these strategies within your organization.

Presenters: Jack Alexander, Helen K. and Arthur E. Johnson Foundation, and Dan Harris, Wells Fargo

Session 1c: Applying Small Business Practices to your Nonprofit for Enhanced Sustainability

Session description coming soon!

Presenter: Marilyn Laverty, Director of the Small Business Development Center at Western State College

Session 1d: Maintaining Morale, Making Cuts, and Other HR Issues for Times of Crisis

Tough times can mean human resources decisions. This session will discuss strategies for making those tough decisions easier, including how to make staff-related cuts and layoffs, and an overview of risk management issues to consider. The presenter will also discuss strategies for maintaining staff morale during difficult times, especially after layoffs or other staff cuts.

Presenter to be determined.

Session 1e: Advancing Leadership through Assessment: Executive Director and Board Self-Assessment Strategies

Strong, effective board and staff leadership is critical to nonprofit success, but even more so during difficult times. However, many nonprofits rarely set performance goals and evaluate achievement of those goals for staff leadership and the board of directors, this creating a barrier to increased effectiveness. This session will help provide organizational leaders with the tools and strategies they

need to effectively assess staff leadership's performance and effectiveness. Additionally, the session will include a discussion of how nonprofit boards can increase their effectiveness through self-assessment for the board as a whole and as individual board members.

Presenters: Don Wills, Gunnison Area Restorative Practices, and Sarah Fischler, Community Resource Center

Session 1f: ConnectNetworking: Networking for Success in a Changing World

This session will teach you how to use *ConnectWorking*, an approach to networking that is more than just swapping business cards. Instead, it is thoughtfully building mutually beneficial relationships and creating an invisible web of entrusted seamless connections. In this interactive session we will explore some tools for improving your social network, including how you can create effective personal and professional networks that are broad enough, diverse enough, yet focused enough to meet your objectives; developing a strategy for networking; tapping the hidden potential of your social networks; and effectively using the internet to grow your network. Everything we do is a result of interdependencies. Intentional social networking can improve your likelihood of success.

Presenter: Elaine Brett, Black Canyon Land Trust and Western Colorado Food and Agriculture Council

SECOND TRACK OF CAPACITY-BUILDING SESSIONS

1:45 pm to 3:15 pm

Session 2a: Fundraising in Challenging Times

Join this discussion of how to best garner the resources your organization needs to continue providing vital services. The presenter will discuss the always-important essentials of the fundraising cycle, as well as special considerations during times when environmental or even internal situations make fundraising more challenging. Particular emphasis will be on what you can and should be doing NOW to ensure long-term resource development success and organizational sustainability.

Presenter: Illene Roggensack, Third Sector Innovations

Session 2b: Planning and Preparation for Capital Campaigns

This workshop is designed to help small and large nonprofits contemplating a capital project and/or campaign learn to plan earlier and better, thus avoiding many costly and all too common mistakes. The facilitator will review key steps in planning and conducting a capital project, and will cover critical questions every nonprofit should ask before moving forward.

Presenter: Lisa Flores, Gates Family Foundation

Session 2c: Key Strategies for Effective Financial Management

Organizations with strong financial management practices will be better positioned to withstand tough times and make effective strategic, operational, and programmatic decisions. This session will provide information on the basic tools of nonprofit financial management, including a discussion about the financial statements that all nonprofits should have and use, key financial management practices

for nonprofit organizations, and information to help your organization identify how well the board and staff are managing its finances.

Presenters: Kelleen Zubick, Community Resource Center; Colorado Nonprofit Association staff

Session 2d: Keep Yourself Out of Jail: Legal Requirements and Ethical Issues for Nonprofits

Legal and ethical compliance is an essential best practice for nonprofit organizations, especially during difficult times when competition for funding and donor scrutiny increases. To help your organization ensure that it is effective in these areas, this session will cover topics including transparency, conflicts of interest, fiduciary responsibility for directors and officers, duties of nonprofit board members, legal and ethical issues around financial management, and risk management. Additionally, this session will include practical tips on implementing these ideas through policies and integrating this thinking into your organizational culture.

Presenters: April Montgomery, Telluride Foundation, and Luke Danielson, attorney in private practice

Session 2e: Maintaining Your Passion during Stressful Times

When faced with shrinking donor sources and donors that are holding on to their scarce resources how do you maintain your passion to build a better community, or save you part of it? Especially when the stress is building, board members are calling and so is the bank! Come hear how to unleash the power of the passion that started the mission in the first place, and tapping the resource of those who share your passion! The session is meant to be both inspiration and practical sharing of ideas and tapping the unlimited resource of your collective genius.

Presenter: Mark Ewing, Community Foundation of the Gunnison Valley

Session 2f: Social Media for Nonprofit Organizations

Social media can help your organization engage more constituents, raise more money, or bring your mission to new audiences. Don't know where to start? Come to this session to learn about the basics about major social media tools available to nonprofit organizations, how to decide if your organization should use them, how to get started, and how to measure return on investment related to social media. The session will also include visits to social media sites (Facebook, Twitter, and others), plus a look at how some organizations have successfully used social media tools.

Presenters: Sarah Fischler and Lauren Price, Community Resource Center

THIRD TRACK OF CAPACITY-BUILDING SESSIONS

3:30 pm to 5:00 pm

Session 3a: Weathering the Storm: Nonprofit Survival Guide

Building upon the vibrancy and value of the nonprofit sector, the session will analyze the current economic situation and explore avenues for nonprofits to not only survive, but thrive by engaging staff, board and volunteers to help advance missions. By offering practical examples and ideas, this session will cover outreach, communications, strategic collaboration and approaches to invigorate boards to become active ambassadors.

Presenter: Jeff Pryor, Anschutz Family Foundation

Session 3b: Advanced Strategies for Capital Project Success (Roundtable Discussions with Capital Funders)

If your organization is engaged in a capital campaign or capital project, or ready to launch, this session is for you! This session will include the opportunity to interact with capital funders from foundations, local government, and a federal agency to discuss your challenges, strategies, questions, and ideas. Topics will be generated by participants and conversations will take place in a roundtable format.

Confirmed participants include: Katie Kramer, Boettcher Foundation; Tony Hernandez, State of Colorado Department of Local Affairs; Pattie Snidow, United States Department of Agriculture, Western Slope and Northwest Regions; and Lisa Flores, Gates Family Foundation. Other funders are expected to participate.

Session 3c: Advanced Financial Management Strategies for Uncertain Times

This session is for participants who are looking to take their organizations to a more advanced and sophisticated level of financial management. The session is targeted to individuals with moderate level of understanding of nonprofit financial management, and will be appropriate for executive directors, nonprofit finance staff, and board leadership.

Presenter: Susan Steele, Temple Hoyne Buell Foundation

Session 3d: Evaluation: Measuring and Reporting Your Success

Evaluating programs and organizational activities is an essential component in communicating success and effectiveness to funders, donors, partners, and other stakeholders. These facilitators will discuss why evaluation is an essential nonprofit best practice, identify some basic evaluation strategies, and discuss tips on how to get started on both programmatic and organizational evaluation activities. Additionally, session participants will benefit from the perspectives of a nonprofit grantmaker and nonprofit technical assistance provider.

Presenters: Rebecca Larson, OMNI Institute, and Alexis Weightman, The Colorado Health Foundation

Session 3e: Myers-Briggs: Helping Develop Your Leadership Style by Understanding Your Personality Traits (Additional \$25 fee, pre-registration required)

In this session, executive directors, staff members, or board members will have a unique opportunity to learn more about themselves and their leadership style. Cathy Robbins, Vice President of El Pomar Foundation will provide insights about the *Myers-Briggs Type Indicator*® (MBTI®) during this interactive session. The MBTI assessment is the most well known and scientifically backed personality tool available today. From developing more productive work teams to building closer families, the MBTI is a valuable methodology for anyone and any organization. After more than 50 years, the MBTI instrument continues to be the most trusted and widely used assessment in the world for understanding individual differences and uncovering new ways to work and interact with others. More than two million assessments are administered to individuals annually—including employees of many Fortune 500 companies.

*Note: Participants will complete the MBTI before the session and then **must** be present in the session to receive their results.*

Presenter: Cathy Robbins, El Pomar Foundation

Session 3f: Community Engagement Strategies: Inclusiveness and Outreach

During difficult times, it is even more essential for organizations to ensure that they are providing the right services in the right ways to meet their constituent's needs. This session will help participants identify the strategies necessary to engage the communities they serve and integrate inclusive practices in their organization's activities. Topics for discussion will include definitions and examples of community engagement activities and inclusiveness, the importance of these strategies in developing effective organizations. Additionally, participants will be able to identify ways for their organization to better engage its constituents and become more inclusive.

Presenter: Benito Cardenas, One Telluride, and Community Resource Center staff

PRESENTER BIOGRAPHIES:

Jack Alexander is in his seventh year as President of the Helen K. and Arthur E. Johnson Foundation. Previously, Jack served as Vice President for Development at the Colorado Symphony, and for 35 years served with private, medium sized colleges and universities, generally as chief development officer. These institutions included Regis University, Loyola Marymount University, Cornell College, DePaul University, and Jacksonville University. He also operated a development and public relations consulting firm for a number of years. Jack has served as president of the Colorado Association of Funders and as president of the Colorado Association of Fund Raisers. He is married to Sally and parents of two grown children and seven grandchildren.

Benito Cardenas, born and raised in south Texas, graduated from high school in San Antonio and went on to receive his B.S. in Family and Consumer Journalism at the University of Wisconsin. After working in the advertising industry, he went on to receive his M.S. in Library and Information Science at the University of Illinois. He worked in libraries in Illinois, Texas and Colorado before moving on to his current position as Director of One Telluride, developing a resource and referral organization to serve the immigrant and receiving communities and providing programs and opportunities in support of the organization's mission of immigrant integration. When he's not at work, Benito enjoys snowboarding, camping, mountain biking and learning new things.

Elaine Brett is President of the Black Canyon Land Trust and the Western Colorado Food & Agriculture Council. Elaine also operates an independent organizational development consulting firm, which in part provides services for nonprofit organizations. Living in Hotchkiss, Colorado, she has experienced first-hand the importance of nonprofit organizations in serving the rural communities on the Western Slope.

Luke Danielson is an attorney in private practice in Gunnison. More coming soon!

Lisa Flores is Senior Program Officer at the Gates Family Foundation, where she reviews capital grant proposals for small and large projects throughout the state of Colorado. Previously, she served as senior staff to Denver's Mayor Hickenlooper. Earlier in her career (when she had more energy than experience), she served as executive director and raised operating and capital funds for the Denver Inner City Parish, a multigenerational community center. Flores received her Master's in Nonprofit Management at Regis University and is an alumni trainer for the Grassroots Institute for Fundraising Training.

Mark Ewing moved to Crested Butte seeking relaxation and a peaceful lifestyle in 2003. He began as the Executive Director of the Chamber of Commerce in Crested Butte/Mt. Crested Butte, then returned to the Mortgage Lending Business in 2006, joining Community Banks of Colorado as a Mortgage Banking Officer. Mark is Vice President and Vice Chairman of the Board for the Community Foundation of the Gunnison Valley, member of the Board of the Junior Achievement Organization in Crested Butte and Gunnison, an Elder at the Oh-Be-Joyful Church in Crested Butte. He has helped lead the Gunnison Valley Leadership Group and has been instrumental in organizing the Civility Initiative of the Gunnison Valley. In his spare time Mark likes to ski and fish; if he could find a way to combine those activities, his life would be full!

Sarah Fischler is the Director of Organizational Development Services for the Community Resource Center and oversees CRC's training, consulting, and rural outreach activities. Previously, Sarah served as the Director of Grantmaking and Mission Initiatives for the Denver Affiliate of Susan G. Komen for the Cure where she oversaw the distribution of nearly \$10 million in funding. Sarah graduated from the University of Colorado with a bachelor of arts in history, a bachelor of science in business administration, and a master's degree in public administration. Sarah brings expertise in grantmaking, board development, fundraising, planning, organizational assessment, and program development, management, and evaluation to CRC. Sarah is also the co-author of *Engaging Tomorrow's Donors Today*, a toolkit for nonprofits interested in utilizing social media tools and developing specific strategies to attract and engage younger donors.

Dan Harris is Vice President, Charitable Consultant, with the Wells Fargo Charitable Management Group. Prior to joining Wells Fargo in 2006, Dan was director of gift planning for Community First Foundation, a position he held for five years. Dan has over 18 years of financial markets experience, including positions in the United States, Japan, and Germany. Dan holds a BA from McGill University in Montreal and an MBA in finance from The University of Texas. Dan is a volunteer with a number of nonprofit organizations including the Colorado Planned Giving Roundtable where he has served on the board for five years, and was President in 2007. Dan is a frequent speaker on gift planning and philanthropy.

Rebecca Larson is the Regional Prevention Consultant for the OMNI Institute. More coming soon!

April Montgomery has worked as the Programs Director for the Telluride Foundation for four years, where she helps to manage their nonprofit building capacity efforts, grant program and initiatives. April also has had a consulting business since 2001, where she provides nonprofit and government organizations with grant writing, legal, project management, strategic planning and land use planning assistance. April was a planner and the Open Space & Recreation Director for San Miguel County from 1991 to 1999. She has a BA degree in Government from the University of Virginia and received her law degree from the University of Virginia in 1989; she is currently a member of the Colorado Bar. April serves on numerous boards including the Trust for Land Restoration, the Uncompahgre Medical Clinic, and the Southwestern Water Conservancy District.

Lauren Price works with the Community Resource Center, consulting with clients across the state in strategic planning, board governance, major donor development, 501(c)(3) development, and fund planning. A graduate of the University of Notre Dame, Lauren has served as the campaign manager for the \$19 million comprehensive campaign at the Museum of Contemporary Art Denver, grantwriter and fundraising consultant for arts organizations serving the physically disabled, and as interim campaign director for Aspen Education Foundation's \$28 million campaign feasibility study. She is passionate about the transformative power of Colorado's nonprofits and dedicated to the continuous improvement of the sector. While she currently serves on the Finance and Development Committees of the Cherry Creek Chorale and on the Board of Advisors of the Center for Christian-Jewish Dialogue in Colorado Springs, one of her most fulfilling professional opportunities is working with RPD Steering Committees across the state.

Jeff Pryor is the Executive Director of the Anschutz Family Foundation and an adjunct faculty at Regis University's Masters of Nonprofit Management Program. Jeff has a sustained commitment to

the nonprofit sector in Colorado, and was a founding board member of Colorado Youth Corps Association, co-founded Volunteers for Outdoor Colorado, and served on the Colorado Governor's Commission on Community Service. Jeff was also instrumental in helping establish a graduate school for NGO leadership and management in South Africa. He is the recipient of the Colorado Nonprofit Association's 2009 Steve Graham Award for Building Nonprofit Capacity.

Cathy O. Robbins is the Vice President, El Pomar Foundation. She brings an extensive background in nonprofit sector management, consulting and training. Robbins is a nationally recognized facilitator and leader in the field of nonprofit management and has 23 years experience as a nonprofit chief executive officer. Since 1992, Robbins has conducted over 100 board planning and training sessions with a variety of nonprofit organizations. Since 1993 as an instructor at the University of Colorado, Graduate School of Public Affairs, she teaches nonprofit management curriculum. Additionally, she has developed and taught several seminars, including *A Step by Step Approach to Strategic Planning, Leading Nonprofit Boards with Heart and Vision* and *Trends Impacting the Nonprofit Sector*. She is an Adjunct Faculty member for Community Programs for the Center of Creative Leadership.

Illene Roggensack is the owner of Third Sector Innovations, based in Grand Junction and working with nonprofit and governmental organizations to meet planning, staffing structure, marketing and market assessment, fundraising, leadership and other development needs. Formed in 1994, the heart of the business has been in projects for Western and rural Colorado's small- and mid-sized grassroots agencies. Illene's expertise as a nonprofit generalist comes from more than 23 years as an executive director, fundraising director, board member, volunteer and consultant. This experience is coupled with an MBA, a BA in journalism and recognition as a Certified Fund Raising Executive (CFRE). She is a Past President for the Colorado Nonprofit Association and the Grand Junction Lions Club.

Susan Steele is the Executive Director of the Temple Hoyne Buell Foundation. More coming soon!

Alexis Weightman is the Director of Evaluation for The Colorado Health Foundation. More coming soon!

Donald Wills has been the Executive Director of Gunnison Area Restorative Practices since October, 2006, where he is able to be directly involved in his passions, including Working with youth and adults in need of restorative practices while repairing harms, restoring relationships and rebuilding communities. Don has also served his communities as the minister of a number of churches and has served on many nonprofit boards of directors. Don has a bachelor of science in social sciences, a master of divinity, and a juris doctor.

Kelleen Zubick, MFA, is a capacity building consultant and trainer at the Community Resource Center, and has held senior positions in nonprofits for over 15 years. Most recently she served as executive director of the Colorado Business Committee for the Arts. She is passionate about supporting the nonprofit sector and has experience in designing and providing training, technical assistance, consulting and facilitation for organizations and associations. Her primary areas of expertise include organizational and program planning, working with boards, fundraising, and financial management. She has earned certificates of training from the Grantsmanship Center, Board Source, and the Leeds School of Business at the University of Colorado.