

PHILANTHROPY  
*Day*  
2022



**Reunite to Ignite**

# Philanthropy Day on Cape Cod

*Bringing the Cape Back Together  
to Share our Spark!*

**Wednesday, November 9, 2022  
Hyannis Resort & Conference Center**

**CAPE  
COD5**

*Thank you to our Premier Sponsor, Cape Cod 5  
for your continued support.*

## Welcome to the 25<sup>th</sup> Annual Philanthropy Day on Cape Cod!

***For the first time since 2019, we're excited to bring nonprofit professionals back together to share our spark at this year's Philanthropy Day on Cape Cod.***

As you may know, Philanthropy Day began in 1996 as a small luncheon with one speaker and a handful of attendees. While the event has certainly evolved, our mission remains the same: to provide the nonprofit community with high-quality education and to celebrate the impact of philanthropy on Cape Cod and the Islands. We are proud to deliver exceptional programming that makes this event special.

Today would not be possible without the dedicated volunteer committee that organizes this event. The group has spent a year coordinating a stellar lineup of speakers, working closely with annual sponsors, making the community aware of the event, reviewing award nominations, and coordinating the logistics to ensure a tremendous experience.

Philanthropy Day is the flagship event of Philanthropy Partners of the Cape and Islands, and we encourage you to become a member or sponsor if you are not already. Our members share interests and knowledge of philanthropy and are invited to attend education events and networking opportunities throughout the year. Our sponsors are committed to furthering the growth and progress of our nonprofit community on the Cape & Islands. Learn more about supporting PPCI at [www.capecodgiving.org](http://www.capecodgiving.org).

In appreciation of the Philanthropy Partners of the Cape and Islands members, we will be hosting two “**Surprise**” **Mini-Grant Drawings!** The first drawing will take place at the conclusion of our program. The second will be presented during the CCYP Philanthropy & Community Connect from 4:00 – 6:00 pm at *The West End*. You must be a PPCI member and present to win.

***PPCI member attendees have been automatically entered into the drawings!***

***On behalf of the Philanthropy Day Committee, we hope you enjoy celebrating, learning and networking!***

### COMMITTEE CO-CHAIRS:

**Margot Cahoon**, *Communication Savvy*  
**Catherine Clark**, *Housing Assistance Corporation*

### COMMITTEE MEMBERS:

**Jennifer Allard**, *Mainsail Events & Marketing*  
**Kara Boule**, *Nauset Disposal*  
**Jennifer Curran Bryant**, *Cape Cod Commercial Fishermen's Alliance*  
**Kelsey Ellis**, *Barnstable Land Trust*  
**Elizabeth Grady**, *Cape Cod 5*  
**Laurel Hartman**, *Kinlin Grover Real Estate*  
**Heather Kelsey**, *Latham Centers, Inc.*

**Danielle Kempe**, *CFRE, Dogs for Better Lives*  
**Brigid Krug**, *Cape Cod Commercial Fishermen's Alliance*

**Suzanne B. Lonergan**, *Fundraising Strategist, Independent*

**Kathy McNamara**, *Cape Cod Community College Educational Foundation*

**Whitney McNamara**, *Cape Cod & Islands Association of REALTORS®*

**Shawna Moos**, *YMCA Cape Cod*

**Rosemarie Resnik**, *Rosemarie Resnik & Associates, Inc.*

**Patty Watson**, *Cape Cod Children's Place*

## Our Plenary Session

### *From Challenges to Change: Building a Stronger Cape Cod*

Join keynote speakers **Kristy Senatori**, *Executive Director of the Cape Cod Commission*, and **Kristin O'Malley**, *President and CEO of the Cape Cod Foundation*, as they examine the state of the Cape, share inspiring examples of the resilience in our community, and outline strategies we can employ together to build a stronger Cape Cod.

**The Cape Cod Commission** is the regional land use planning, economic development, and regulatory agency created in 1990 to serve the citizens and 15 towns of Barnstable County, MA. The Commission is an agency of Barnstable County regional government but is funded separately through the Cape Cod Environmental Protection Fund and supplemented by grants.

The Commission carries out its mission of *keeping a special place special* by leading, supporting, and enforcing the development of regional plans, policies, regulations, and infrastructure to guide and manage growth, and by supporting the 15 Cape Cod towns with professional and cost-effective planning and technical support services. Through its efforts, the Commission strives to foster a viable year-round economy with thriving economic centers and well-preserved natural habitats and open spaces, a sustainable region with strong intermunicipal coordination and regional infrastructure.

**The Cape Cod Foundation** is a community foundation. It exists for one single reason: to strengthen and enrich *our* community. They do this by building resources and then investing those resources back into the community. Where they belong. Where they'll do the most good. For now. For the future.

They do this in two ways: • *They help other people create charitable funds that, when pooled and invested wisely, generate revenue for scholarships to local students and grants to nonprofit organizations.* • *Just like donors, they build, invest, and use discretionary funds to bring additional resources to the community: more scholarships and grants, plus a variety of other initiatives with broad regional impact.*

Today, the Cape Cod Foundation manages over 330 funds with assets now exceeding \$100 million. Since its inception in 1989, the Foundation has built many partnerships in the nonprofit sector and distributed more than \$95 million back into the community.



**Kristy Senatori**



**Kristin O'Malley**

## *Philanthropy Partners of the Cape & Islands* **Board of Directors**

**Chris Ellis, President\***

*Community Health Center of Cape Cod*

**Jennifer Cummings, VP of Education\***

*Cape Cod Healthcare Foundation*

**Cynthia Cotton, VP of Marketing/Membership\***

*CFRE, Osterville Village Library*

**Sarah Tribuzio, Immediate Past President**

*Decatur House Assisted Living*

**Vanessa Greene, Treasurer**

*The Cape Cod Five Cents Savings Bank*

**Rosemarie Resnik, Secretary**

*Rosemarie Resnik & Associates, Inc.*

**Jennifer Curran Bryant, Cape Cod Commercial Fishermen's Alliance**

**Gerry Desautels, CFRE, Outer Cape Health Services**

**Tamara Harper, Cape Cod Theatre Company**

**Laurel Hartman, REALTOR, Kinlin Grover Real Estate**

**Beth Howard, Cape Cod Healthcare Foundation**

**Jean Kourafas, Administrative Coordinator\***  
*Philanthropy Partners of the Cape & Islands*

**PJ Richardson, YMCA Cape Cod**

*\* Philanthropy Day Committee Leadership*

7:30 - 8:30 am - Continental Breakfast, Registration, Networking ...

8:30 - 8:45 am - Welcome to Philanthropy Day - Grand Ballroom ...

9:00 - 10:00 am

### DONOR STEWARDSHIP - YOU RECEIVED A GIFT, NOW WHAT?

How do you thank donors so they stay involved with your organization? Learn strategies for thanking, recognizing, updating, and inspiring your donors - keeping them engaged throughout the year and in turn, building life-long supporters. This workshop will examine steps to take after a donation is made, offer creative ideas for stewardship, and suggest methods for tracking interactions with up-to-date database management.

**Jennifer Curran Bryant**, *Director of Development, Cape Cod Commercial Fishermen's Alliance;*

**Brigid Krug**, *Development Coordinator, Cape Cod Commercial Fishermen's Alliance*

*The Bass River Room*

### THE CHANGING LANDSCAPE OF MAJOR GIFTS

The times are a-changing. And with change comes new challenges and opportunities. The Cape has experienced an influx of potential new donors. We will look at this new landscape and outline the necessary preparations and practical tools to support a Major Gifts program that will serve to grow and sustain your organization's fundraising program.

**Suzanne B. Lonergan**, *Fundraising Strategist, Independent;*

**Hellie Swartwood**, *Director of Advancement, Cape Cod Academy*

*The Cape Cod Room*

10:15 - 11:15 am

### CULTIVATING AN ENGAGED GIVING COMMUNITY

Great fundraisers unlock generosity by bringing people closer to their cause. We need ambassadors who motivate and inspire others to successfully build an engaged giving community. Learn how to empower your supporters and cultivate relationships that reignite your fundraising roadmap. You'll walk away with actionable ideas to inspire philanthropy and further your organization's mission.

**Lisa Guyon**, *Executive Director, WE CAN;*

**Anne B. Van Vleck**, *Chief Development Officer, Housing Assistance Corporation;*

**Julie Wake**, *Executive Director, Arts Foundation of Cape Cod*

*The Bass River Room*

### STRATEGIC PLANS THAT SPARK FUNDRAISING SUCCESS

Faced with multiple stakeholders, limited resources, and ambitious fundraising goals? Translate your strategic plan into an effective tool that can drive transformational change, simplify complex ideas, focus resources, and make the case for support. Learn how to develop a strategy map, a simple one-page diagram using the Balanced Scorecard, that can be used as a story-telling tool while also effectively using metrics to illustrate impact, progress, and goals. Join us to explore how to better leverage your strategic plan to inspire new and increased philanthropic support for your organization.

**Susan Sullivan**, *Director of Communications, Barntable Land Trust*

*The Cape Cod Room*

11:30 am - 12:30 pm

### ENDOWMENTS: BUILDING A FINANCIAL BEDROCK FOR YOUR ORGANIZATION

The primary fiduciary responsibility of a board is to ensure the long-term health of an organization. Learn about the benefits of creating and building an endowment for your nonprofit.

**Rachael Aiken**, *Vice President and Senior Investment Officer, Cape Cod 5; Board Chair, Cape Cod Community College Educational Foundation;*

**Kathy McNamara**, *CEO, Cape Cod Community College Educational Foundation;*

**Bert Talerman**, *President, Cape Cod 5; President, Kelley Foundation*

*The Bass River Room*

### FUNDRAISING EVENTS & DONOR COMMUNICATIONS: BEFORE, DURING, AFTER

Events can be the most effective way to introduce prospective donors and nurture existing donors. Shift your mindset to your event being a year-long endeavor. Communication is key. How to build an invitation list, research your guests, engage your board and committee in the process, and Communicate! Communicate! Communicate! Make the most of your commitment to delivering a successful event.

**Christa S. Danilowicz**, *Senior Philanthropy Officer, Big Brother Big Sisters of Cape Cod & the Islands, Eastern Massachusetts;*

**Jennifer Allard**, *Owner, Mainsail Events & Marketing*

*The Cape Cod Room*

12:30 - 2:00 pm - Plenary Session & Luncheon - Grand Ballroom

*From Challenges to Change: Building a Stronger Cape Cod* - All too often we focus solely on the challenges in our community, not on the solutions and the good work happening to counteract those challenges. Join two local leaders as they examine the state of the Cape, share inspiring examples of the resilience in our community, and outline strategies we can employ together to build a stronger Cape Cod.

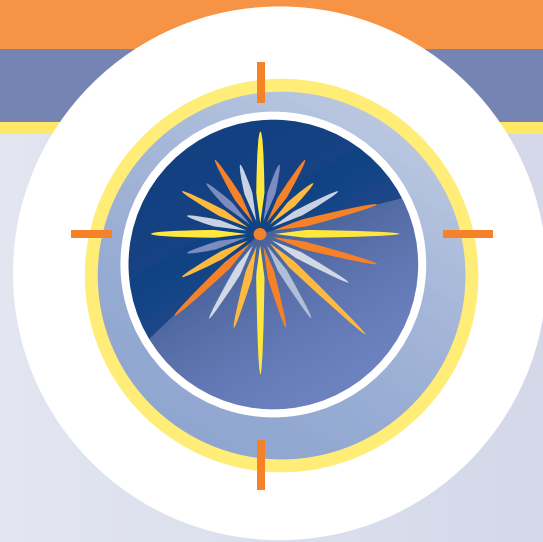
2:00 - 3:30 pm - Distinguished Service to Philanthropy Awards ...

4:00 - 6:00 pm - CCYP Philanthropy & Community Connect in Partnership with PPCI ...

# Session Descriptions & Locations

... and Meet the Exhibitors

... Followed by Networking in the Exhibit Hall



9:00 - 10:00 am

## **BUILDING A BETTER BOARD**

An organization's board is critical to the success of a nonprofit. The board has a fiduciary responsibility, and it can and should strengthen the organization in many other important ways. Board members are ambassadors in the community, make connections, ask for financial support, and extend the reach of your nonprofit. Learn about the attributes of strong board members and how you can build a vital and diverse board.

**Christine Menard**, Executive Director, The Family Pantry of Cape Cod;  
**Craig Morong**, Board Member, The Family Pantry of Cape Cod;  
Board member, Cape Cod Community College Educational Foundation

*The Hyannisport East Room*

## **GRANT FUNDING - CREATING AN EFFECTIVE PLAN AND CRAFTING WINNING PROPOSALS**

Dorothy Bassett and Heather Kelsey will outline the essential components of a winning grant proposal. What are foundations and federal and state agencies looking for in a proposal? What makes a project "fundable"? Topics include researching funding opportunities, building relationships with funders, avoiding mission creep, time management, presenting a sound budget, crafting a compelling narrative, and measuring and reporting impact.

**Dorothy Bassett**, Director, Development & Communications, Pleasant Bay Community Boating;  
**Heather Kelsey**, Director of Advancement, Latham Centers, Inc.

*The Hyannisport East Room*

## **MARKETING PARTNERSHIPS IN PHILANTHROPY: COLLABORATING TO EXPAND IMPACT**

Building partnerships between nonprofit organizations and for-profit entities improves an organization's ability to reach wider audiences, expand bandwidth, and deliver programs more efficiently. Panelists will share their expertise and stories of the successful alliances they have managed. Participants will take away information about complimentary programs and platforms, as well as tips that they can use at their own non-profit organizations.

**Dawn Dinnan**, Director of Communications, Latham Centers, Inc.;  
**Amanda "Kai" Kaiser**, Program Manager, EforAll Cape Cod;  
**Tracy O'Neill**, Principal, Two Crows Creative Group

*The Hyannisport West Room*

10:15 - 11:15 am

## **SUCCESSFUL SUCCESSION PLANNING**

What's coming? It's hard to know these days, and certainly hard to plan for. As nonprofit organizations, how do we build succession planning into our strategic plans? Touchstone Advisors of Cohasset says, "Positively! Creatively! Innovatively!" This session will engage colleagues in a thought-provoking, participative session on one of the most pressing topics in business today.

**Kathryn Earle**, Consultant, Touchstone Advisors of Cohasset

*The Hyannisport East Room*

## **DEVELOPING A STRONG CASE FOR SUPPORT**

Fundraising and marketing success begins with a strong case for support that offers compelling examples of how your organization meets community needs, and why your organization deserves funding. Discussions will include case components, such as mission, vision, and need statements; the elements of a persuasive argument; the importance of good visual communications and brand identity; and tips for best practices in writing.

**Laura P. McMahon**, Director of Communications, Rosemarie Resnik & Associates;  
**Lisa Walker**, Co-Executive Director & Director of Development, Highfield Hall & Gardens

*The Hyannisport West Room*

11:30 am - 12:30 pm



## **Keynote Speakers:**

**Kristy Senatori**, Executive Director, Cape Cod Commission  
**Kristin O'Malley**, President & CEO, The Cape Cod Foundation

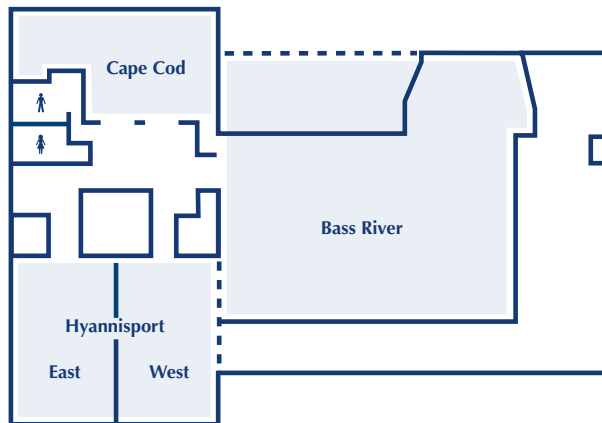
... and Philanthropy Day Celebration

... at The West End ... Doors open early at 3:30 for our attendees.

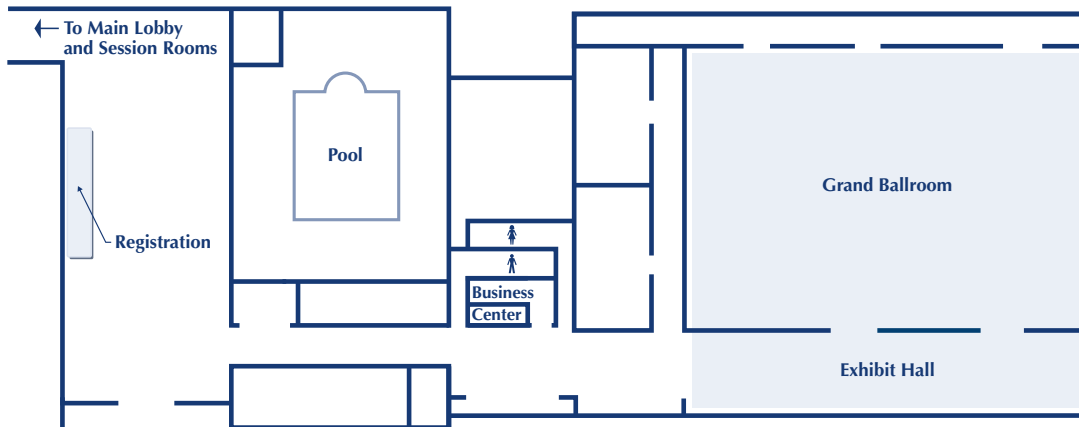


\* Full participation in Philanthropy Day on Cape Cod is applicable for 4 points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

## Conference Center Meeting Rooms



Second Level



First Level

## 2022 In-Kind Sponsors



**Volunteer with PPCI  
for next year's  
Philanthropy Day!**



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Meeting Space Sponsor

PPCI welcomes both new and experienced nonprofit professionals to volunteer for next year's Philanthropy Day or our year-round programs and committees. **Scan the QR code** to fill out our volunteer interest form to see where you might best fit. We look forward to seeing more of you in 2023.

## Celebrate Philanthropy Day – with Networking & Mini-Grant Drawings!



### Join us for the two drawings for your chance to win!

Members of Philanthropy Partners of the Cape and Islands are eligible to participate in not one but TWO mini-grant drawings. PPCI member attendees have been automatically entered into the drawings!

- The first drawing, sponsored by **The Bilezikian Family Foundation**, will gift three (3) \$500 mini-grants at the conclusion of our awards presentation.
- The second drawing, sponsored by **MassHire Cape & Islands Workforce Board**, will gift two (2) \$500 mini-grants at the CCYP Philanthropy & Community Connect from 4:00 – 6:00 pm at The West End.
- Must be present at the event to win.
- If you represent a nonprofit, at least one individual of your organization must be a current PPCI member in order to qualify.
- If you do not work for a PPCI nonprofit member and are selected as one of the winners, you may designate your grant to be awarded to a PPCI nonprofit organization!
- The winning organization must be a registered 501(c)(3).
- Only one mini-grant will be given per organization.

### Membership to PPCI is the Best Deal in Town!

Philanthropy Day is the premier program of Philanthropy Partners of the Cape and Islands (PPCI), whose purpose is to encourage charitable giving; promote cooperation and foster a better understanding among professional charitable gift planners; and further the education and capabilities of its members, the professional community and the general public.

**PPCI membership pays for itself!** Individual membership is \$120 and Business/Organization membership is \$225. Philanthropy Partners of the Cape and Islands (PPCI) Members receive discounted rates to Philanthropy Day and are invited to attend quarterly meetings and networking events at no additional cost! The 2023 schedule is listed below and subject to change so visit [CapeCodGiving.org/events](https://www.capecodgiving.org/events) for up-to-date information.

### 2023 Event Schedule

|                 |                               |
|-----------------|-------------------------------|
| January 19      | Annual Meeting - Lunch        |
| March 8         | Evening Networking            |
| April 12        | Quarterly Meeting - Breakfast |
| May 10          | Evening Networking            |
| June 14         | Quarterly Meeting - Breakfast |
| July 19         | Evening Networking            |
| September 20    | Quarterly Meeting - Breakfast |
| To Be Announced | Philanthropy Day 2023         |

### HELP US SPREAD THE WORD!

Use **#capecodgiving** in  
your social media posts  
and pictures!



**Philanthropy Partners of the Cape and Islands**  
P.O. Box 41 • Yarmouth Port • MA 02675  
774-224-2662 • [www.capecodgiving.org](https://www.capecodgiving.org)



# Special thanks to our sponsors who support our flagship event & a year of great programming!

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Cape Cod & the Islands

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*Mini-grant Sponsor*



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