



PHILANTHROPY
Day
2023



Philanthropy Day on Cape Cod

Wednesday, November 15, 2023
Hyport Conference Center at the Emerald Resort

**CAPE
COD5**

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

Welcome to the 26th Annual Philanthropy Day on Cape Cod!

Whether this is your first or twenty sixth Philanthropy Day, we're excited to have you join us as we learn, share and recognize the dedication and generosity of those who support the many nonprofit organizations on Cape Cod and the Islands.

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 through the years, our mission remains the same: to provide our region's nonprofit community with high-quality education and to celebrate the impact of philanthropy on Cape Cod and the Islands. We are proud to deliver the exceptional programming our attendees are accustomed to, and this year's program is no exception.

Today would not have been possible without the dedicated volunteer committee that organizes this event. This group of talented individuals have spent a year coordinating a stellar lineup of speakers, working closely with annual sponsors, raising awareness in our community for Philanthropy Partners and this event, reviewing award nominations and coordinating complex logistics to ensure attendees have an impactful and positive 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 volunteers are committed to furthering the growth and progress of our nonprofit community on the Cape and Islands and we are so grateful for their support. Learn more about supporting Philanthropy Partners – through membership, sponsorship, or volunteering – online at www.capecodgiving.org.

In appreciation of our members, we will be hosting a series of mini-grant drawings at Philanthropy Day. The first series of mini-grant drawings, sponsored by the The Bilezikian Family Foundation, will take place at the conclusion of our program. The second series of mini-grants, sponsored by MassHire Cape and Islands Workforce Board, will take place at the After Party. You must be a Philanthropy Partners member and present to win. ***Please note, member attendees have been automatically entered into these drawings!***

Philanthropy Day Committee - We hope you enjoy learning & networking!

COMMITTEE CO-CHAIRS:

Margot Cahoon, *Communication Savvy*
Cynthia Cotton, *CFRE, Osterville Village Library*

COMMITTEE MEMBERS:

Jennifer Allard, *Mainsail Events & Marketing*
Jackie Barber, *Cape and Islands United Way*
Devan Bolinder, *CCB Media*
Kara Boulé, *DeLude Communications*
Caitlin Buckley, *Cape Cod Foundation*
Adam Burnett, *Champ Homes*
Andrew Coleman, *YMCA Cape Cod*
Jennifer Curran, *Pleasant Bay Community Boating*
Christa Danilowicz, *Big Brothers Big Sisters*
Gerry Desautels, *Outer Cape Health Services*
Chris Ellis, *Community Health Center of Cape Cod*
Kelsey Ellis, *Barnstable Land Trust*

Silene Gordon, *MassHire C&I Workforce Board*
Vanessa Greene, *Cape Cod 5*
Tammy Harper, *Payomet Performing Arts Center*
Judy Harrington, *Harrington Management International*
Laurel Hartman, *Kinlin Grover Real Estate*
Beth Howard, *Cape Cod Healthcare Foundation*
Heather Kelsey, *Latham Centers, Inc.*
Carla Koehl, *Cape Cod Foster Closet*
Jean Kourafas, *Philanthropy Partners of the Cape & Islands*
Brigid Krug, *Cape Cod Commercial Fishermen's Alliance*
Suzanne B. Lonergan, *Development Professional*
Samantha Oliviera
Melissa Pond, *Melissa J Pond LLC*
Rosemarie Resnik, *Rosemarie Resnik & Associates, Inc.*
Samantha Ricciardi, *Cape Cod Community College Educational Foundation*
PJ Richardson, *YMCA Cape Cod*

Our Plenary Session

30 for 30: Leadership and Legacy

Join keynote speaker **James Morton**, retired President & CEO of the YMCA of Greater Boston to see how his first 30 years of life significantly influenced his second 30 years. Through his story, attendees are provided with an opportunity to explore some of the foundational questions of leadership, connection, and storytelling: What compels us to be leaders? Why are our personal stories important and worthy of sharing? How does a person's story influence her or his actions as a leader?

Founded in 1851 as America's first Y, the YMCA of Greater Boston strengthens the Greater Boston community through a focus on youth development, healthy living and social responsibility. As one of the community's leading nonprofits, they are dedicated to nurturing the potential of every child and teen, improving our community's health and well-being and providing opportunities to give back and support our neighbors. Today the YMCA of Greater Boston ranks as one of the largest urban Y's in the nation, staying true to its roots as a values-driven, volunteer-led, human service organization strengthening children, families and communities. The Y's staff, volunteers, and constituents represent the broad spectrum of citizens, by any and all measures, who live in Greater Boston.

The YMCA of Greater Boston is the largest provider of after school programs and child care in the Commonwealth of Massachusetts, offers the state's largest summer youth employment program, involves more than 10,000 children in summer camps, and leverages resources to provide over \$10.3 million in critical services at no cost to low income participants. As financial, demographic and social forces create a "New Boston", the Y continues to provide centers of community life for children, families, and all others in the neighborhoods and towns of the region. Each year the YMCA of Greater Boston enables more than 150,000 youth, adults, and seniors to be healthy, confident, connected and secure.



James Morton

Philanthropy Partners of the Cape & Islands Board of Directors

Chris Ellis, PPCI President

Community Health Center of Cape Cod

Jennifer Curran, PPCI Vice President

Pleasant Bay Community Boating

Cynthia Cotton, PPCI Philanthropy Day Co-Chair

CFRE, Osterville Village Library

Vanessa Greene, PPCI Treasurer

Cape Cod 5

Rosemarie Resnik, PPCI Secretary

Rosemarie Resnik & Associates, Inc.

Jean Kourafas, PPCI Administrative Coordinator

Adam Burnett, *Champ Homes: Boardwalk*

Business Group

Christa Danilowicz, *Big Brothers Big Sisters of*

Eastern MA / Cape Cod & the Islands

Tamara Harper, *Payomet Performing Arts Center*

Laurel Hartman, *Kinlin Grover Real Estate*

Beth Howard, *Cape Cod Healthcare Foundation*

Heather Kelsey, *Latham Centers*

PJ Richardson, *YMCA Cape Cod*

2023 Philanthropy Day Schedule

**Exhibit Hall Open
8:00 am to 3:30 pm!**

8:00 - 8:45 am - Continental Breakfast, Registration, and Networking

8:45 - 9:00 am - Welcome and Announcements - Grand Ballroom

9:00 - 10:00 am - Plenary Session - Grand Ballroom - 30 for 30: Leadership and Legacy — Greater Boston to explore some of the foundational questions of leadership, connection, and storytelling, and unravel understanding the value of how our personal stories are pivotal in shaping our leadership path, and the inspiration to

10:00 am - Break, Meet the Exhibitors

DIVERSITY, EQUITY, INCLUSION AND BELONGING. I KNOW WHAT IT MEANS. HOW DO I DO IT?

We all want to be better people, better leaders, better community members. But how do we incorporate DEIB into our everyday work? Meet three smart, innovative, and committed community leaders who will help you in your own journey. While they don't have all the answers, they'll talk about how they're doing this important work in their own organizations and what tips and honest thoughts they bring to help make organizations more equitable. • **Dr. Kamara Sidhartha, MD, MPH (aka "Dr. Sid")**, Chief Health Equity and Wellness Officer and Physician, Cape Cod Healthcare • **Tricia Murray**, Juris Doctor, Suffolk University Law School, Manager of Business and Credit Programs, Community Development Partnership • **Pam Andersen**, Director of Business & Credit Programs, Community Development Partnership

The Bass River Room

POWER OF COLLABORATING AND RESOURCE SHARING

Discover best practices for building and maximizing meaningful partnerships. Learn from two experienced nonprofit professionals and explore partnerships at different scales: large-scale region-specific partnering, medium-scale role-specific partnering, and small-scale one-off partnering. Gain insights into navigating challenges, overcoming resistance to change, and avoiding assumptions about partner agencies. Join this session to uncover key principles and practical tips for fostering effective and sustainable partnerships that yield meaningful outcomes.

- **Silene Gordon**, MassHire
- **Gwynne Guzzeau**, Helping our Women

The Hyannisport Room

11:15 am - Break, Meet the Exhibitors

NAVIGATING THE CHANGING TIDES OF TECH: IMPLICATIONS AND STRATEGIES FOR NONPROFITS

This session will provide valuable insights into the latest trends, challenges, and opportunities that nonprofits face in the rapidly changing tech landscape and how this is all shaping the way nonprofits engage, communicate, and achieve their missions. Learn how to navigate the role of AI, technology, and social media in the evolving landscape of fundraising and communications. Attendees will also have the opportunity to explore case studies and best practices from successful fundraising campaigns that have used these tools. By the end of the workshop, attendees will have a clear understanding of how to adapt to the future of fundraising and communications and how to implement practical strategies to improve their impact. • **Julia Campbell**, JC Social Marketing

The Bass River Room

GOVERNMENT AND NONPROFIT PARTNERSHIP: GRANTS, RELATIONSHIPS, AND ACTION

Learn how nonprofits can secure grants from state and federal sources and build strong relationships with representatives in this informative session. Discover strategies for finding relevant grants, preparing compelling proposals, and advocating for funding. Gain insights into navigating the grant acquisition process and maximizing success rates from highly effective local nonprofit professionals with proven track records.

- **Julie Wake**, Executive Director, Arts Foundation of Cape Cod
- **Lysetta Hurge-Putnam**, Independence House

The Hyannisport Room

12:45 pm - Distinguished Service to Philanthropy Awards Luncheon - Grand Ballroom

SECRETS REVEALED! TRANSFORM YOUR DIRECT MAIL FUNDRAISING

Learn how donors respond to different communication elements and gain insights into the ideal frequency of donor contacts with tools to analyze ROI. They'll discuss metrics including acquisition and retention rates, donor recovery tactics, increasing average gift amounts, and industry benchmarks. Join this interactive session and leave with a handy book of hacks that will help you optimize your direct mail campaigns.

- **Sarah Gnerre**, VP of Philanthropy, Five Maples
- **Beth Howard**, Manager of Annual Giving, Cape Cod Healthcare Foundation

The Bass River Room

2023 BOA STUDY OF PHILANTHROPY AFFLUENT HOUSEHOLDS

The 2023 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households. Bank of America partners with the Indiana University Lilly Family School of Philanthropy on a bi-annual basis to produce this study, the ninth in this series of research reports, to provide insight into the charitable habits of affluent households. This session will dive deep into the findings, highlight critical trends in giving patterns and motivations driving these donors, and how nonprofits can integrate these metrics into their fundraising strategies.

- **Caitlin Meloy**, CAP®, Senior Vice President Philanthropic Strategist
- **Chelsea A. Craig**, Vice President and Philanthropic Client Manager

The Hyannisport Room

10:15 - 11:15 am

11:30 am - 12:30 pm

2:30 - 3:30 pm

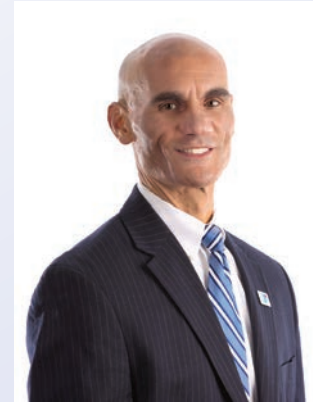
Session Descriptions & Locations

WiFi Network: IrishVillage
Password is emerald1!

See schedule online @

<https://capecodgiving.org/philanthropy-day/2023-philanthropy-day-schedule-of-events/>

Join keynote speaker **James Morton**, retired President & CEO of the YMCA, of the essence of what truly compels us to step up and lead. You'll be left with use your leadership skills to drive change on local and regional levels.



James Morton

10:15 - 11:15 am

PLANNING TO SUCCEED- MAKE A FUNDRAISING PLAN

Discover the secrets to a successful fundraising plan in our interactive workshop. Led by dynamic local nonprofit leaders, this engaging session empowers you to set actionable goals, articulate your organization's mission, and create a comprehensive fundraising calendar. Gain tools to handle challenges and adapt to unexpected changes. Join us and transform your fundraising efforts to propel your organization towards its mission. This is an extraordinary opportunity to elevate your fundraising strategies! • **Sara Anton, MSW, CFRE**, Director of Development, Gosnold Behavioral Health • **Danae Young, BS, MBA**, Sr. Director of Operations, Gosnold Behavioral Health

The Cape Cod Room

7 STEPS TO A VIBRANT AND SUCCESSFUL STRATEGIC PLAN

Join us for an engaging and interactive workshop on strategic planning. This workshop is designed to equip you with the essential skills and knowledge to drive organizational success. Through dynamic presentations and interactive activities, you'll learn practical strategies to develop a robust strategic plan tailored to your organization's unique needs and goals. Walk away with a roadmap for success, enabling you to make informed decisions, allocate resources effectively, and propel your organization towards sustained growth. Don't miss this transformative opportunity to learn from experts and create a strategic plan that will drive your organization's success. • **Wes Harrington**, Harrington Management International • **Melissa J. Pond**, Melissa J Pond LLC

The Cape Cod Room

* 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.

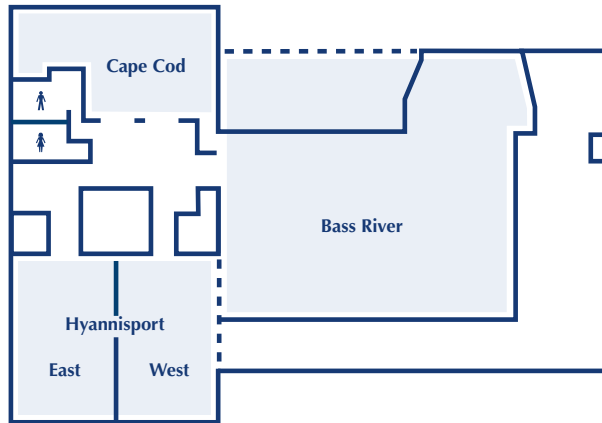


11:30 am - 12:30 pm

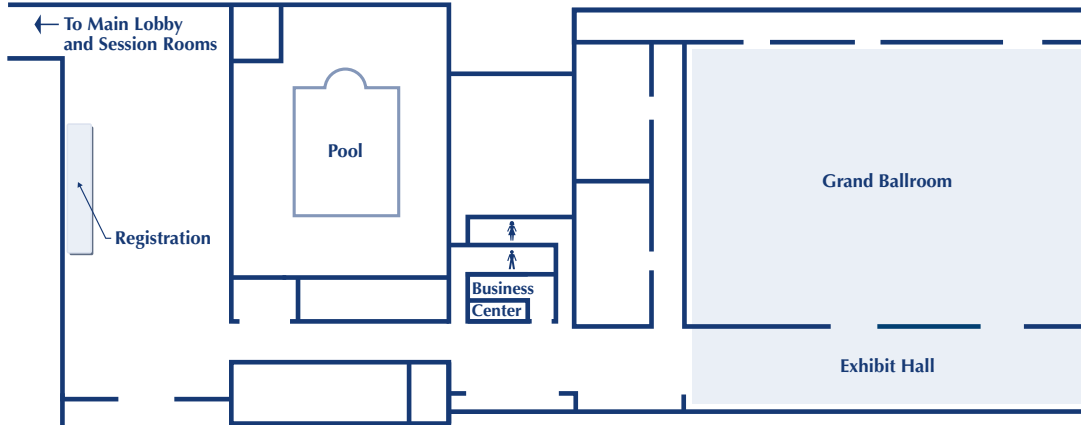
Join us at 3:30 pm for a Philanthropy Day Celebration - "Building Bridges" After Party and Drawing for Mini-Grants at Bogey's Sports Bar in the Hyport Lobby (must be present to win)



Conference Center Meeting Rooms



Second Level



First Level

2023 In-Kind Sponsors



We look forward to seeing more of you in 2024!



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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.

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 *Philanthropy Day Celebration After Party* at 3:30 pm at Bogey's Sports Bar at the Emerald Resort
- 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 2024 schedule is listed below and subject to change. Visit CapeCodGiving.org/events for up-to-date information.

2024 Event Schedule*

| | |
|--------------------|--------------------------------|
| January 25 | Annual Meeting Luncheon |
| March 6 | Evening Networking, Lower Cape |
| April 17 | Quarterly Meeting |
| May 8 | Evening Networking, Mid Cape |
| June 12 | Quarterly Meeting |
| July 17 | Evening Networking, Upper Cape |
| September 18 | Quarterly Meeting |
| November 13 | Philanthropy Day 2024 |

HELP US SPREAD THE WORD!

Use [#capecodgiving](https://twitter.com/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



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

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