

PHILANTHROPY

Day  
2019



Think big. Act boldly. Achieve impact.

# Philanthropy Day on Cape Cod **#capecodgiving**

Tuesday, November 19, 2019  
Hyannis Resort & Conference Center

PREMIER UNDERWRITER: The Edward Bangs Kelley & Elza Kelley Foundation, Inc.

## Welcome to the 23<sup>rd</sup> Annual Philanthropy Day on Cape Cod!

What began in 1996 as a small luncheon with one speaker and a handful of attendees has now grown to be a full day conference with a dozen breakout sessions, nationally recognized keynote speakers and a sellout crowd of over 550 people. 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.

All of this 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, securing sponsorships to underwrite the event, making the community aware of the event, reviewing award nominations, recruiting local students to attend, 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 if you are not already. Membership in the organization is a perfect way to stay current on important aspects of the nonprofit world and a fantastic opportunity to network with peers, board members and volunteers. Find out more about membership at [www.capecodgiving.org](http://www.capecodgiving.org).

In appreciation of the Philanthropy Partners of the Cape and Islands members, we will be hosting a special "Surprise" Mini-Grant Drawing at the Cocktail Party from 4:30 – 5:30 pm in the main hall. You must be a current PPCI member and present to win.

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

### Committee Co-Chairs:

**Barbara Cotton**, *Cape Cod Military Support Foundation*  
**Christa Danilowicz**, *Big Brothers Big Sisters of Cape Cod & the Islands*

### Committee Members:

**Abigail Adams**, *Secure Networks*  
**Catherine Baker**, *Housing Assistance Corporation (HAC)*  
**Amanda Booth**, *Development and Communications Professional*  
**Margot Cahoon**, *Riverview School*  
**Lisa Cohen**, *Capital Motion*  
**Wendy Cullinan**, *Habitat for Humanity of Cape Cod*  
**Gerry Desautels**, *Outer Cape Health Services*  
**Mairead Graf**, *Animal Rescue League of Boston*

**Laurel Hartman**, *Cape & Plymouth Business*  
**Beth Howard**, *Cape Cod Healthcare Foundation*  
**Heather Kelsey**, *Latham Centers*  
**Jean Kourafas**, *Philanthropy Partners of the Cape and Islands*  
**Geoff Lenk**, *Lenk Ladner Investment Solutions*  
**Jean McCutcheon**, *Wheaton College*  
**Shawna Moos**, *Housing Assistance Corporation (HAC)*  
**Katy Paul**, *Cape Cod Collaborative Arts Network*  
**Rose Resnik**, *Rosemarie Resnik & Associates, Inc.*  
**Jill Talladay**, *CARE for the Cape & Islands*  
**Edith Tonelli**, *Tonelli Consulting & Coaching*  
**Jess Whritenour**, *300 Committee Land Trust*

## Our Keynote Speaker

Dan Pallotta is a builder of movements. He invented the multi-day charitable event industry. He created the Breast Cancer 3-Day walks and the multi-day AIDS Rides, which raised in excess of half a billion dollars in nine years and were the subject of a Harvard Business School case study.

The model and methods he created are now employed by dozens of charities and raise in excess of \$100 million annually for important causes from pediatric leukemia to AIDS to suicide prevention and many others. He is the author of *“Uncharitable: How Restraints on Nonprofits Undermine Their Potential,”* the best-selling title in the history of Tufts University Press. The Stanford Social Innovation Review said that the book “deserves to become the nonprofit sector new manifesto.” His newest book is, *“Charity Case: How the Nonprofit Community Can Stand Up for Itself and Really Change the World.”* Robert F. Kennedy, Jr. has described it as “An Apollo program for American philanthropy and the nonprofit sector.”



***“I don’t think of myself as a motivational speaker in the traditional sense. Motivation is fleeting. My highest intention is to transform the context in which people look at their work, their organizations, their lives – to leave them with timeless questions that live on and help create a lasting shift in their thinking. That’s what moves me. That’s why I do it. That’s why I love it.”***

**– Dan Pallotta**





## 7:30 - 8:30 am - Registration, Networking & Meet the Exhibitors

8:45 - 10:00 am

### BLUEPRINT FOR LAYERED GIVING: CULTIVATING MAJOR DONOR RELATIONSHIPS (WILL PRESENT IN THE AM & PM-I)

This panel of seasoned development professionals will share major gift donor cultivation strategies. Learn tactics for effective qualification, strategic engagement, solicitation and stewardship. Learn about effective messaging during differing economic and political climates, as well as key trends; and how to use both to your advantage. Polish your skills in reviving and/or enhancing relationships, having productive and meaningful conversations, and in crafting artful, layered solicitations that include annual, major, planned and capital campaign gifts.

**Pamela Clapp Hinkle**, *Director of Development, Falmouth Academy*;  
**Charlie McNamara**, *Director of Advancement, Riverview School*;  
**Alison Smart**, *VP, Strategy & Advancement, Woods Hole Research Center*

The Bass River Room

### WHAT EVERY NON-PROFIT PROFESSIONAL NEEDS TO KNOW ABOUT FINANCE

For Board Members, Executive Directors and Directors of Development to be effective in their diverse roles, it is essential that they have a strong understanding of non-profit finance. It is critical to building a robust and thorough development plan that meets the overarching needs of the organization. In this session, the presenters will review the cornerstone components of non-profit financial literacy including financial planning and cash management, financial statements and reporting for funders, allocation of direct and indirect costs for programs and goal setting.

**Tammy Glivinski**, *President, Glivinski and Associates, Inc.*;  
**Mark Pearson**, *Executive and Artistic Director, College Light Opera*;  
**Lisa Walker**, *Director of Development, Highfield Hall & Gardens*

The Cape Cod Room



## 10:30 - 11:45 pm - Welcome Brunch & 2019 Awards for Outstanding Philanthropist, Business, Volunteer & Youth - Grand Ballroom

## 12:00 - 1:15 pm - Plenary Keynote, Dan Pallotta - Grand Ballroom

1:30 - 2:45 pm

### BLUEPRINT FOR LAYERED GIVING: CULTIVATING MAJOR DONOR RELATIONSHIPS (REPEATED FROM AM SESSION)

See session description above.

The Bass River Room

### NOT YOUR TYPICAL FUNDRAISER - A FRESH LOOK AT FUNDRAISERS TO ELEVATE PHILANTHROPY

Just because you've always done it one way, doesn't mean you should! How are you connecting your community to mission, purpose, and the highest level strategic priorities? What are the benefits and risks of non-traditional fundraisers? Using examples, the presenters will walk the audience through updating current fundraisers for new audiences, and implementing new and unique fundraising experiences and programs.

**Loriana De Crescenzo**, *CFRE, Chief Development Officer, Newport Hospital Foundation*; **Nicole Fox**, *Global Marketing Strategist, International Fund for Animal Welfare, Inc. (IFAW)*; **Stacey Hedman**, *Global Marketing Strategist, International Fund for Animal Welfare, Inc. (IFAW)*

The Cape Cod Room

## 2:45 - 3:15 pm - Hearty Snacks - Grand Ballroom Foyer

### GET THAT GRANT AND BUILD A LASTING RELATIONSHIP!

Learn how to devise a long-term plan to build lasting relationships with corporate and foundation funders. Panelists will outline the criteria, timeline and eligibility requirements of their particular funding streams. They will offer suggestions for creating successful proposals that focus on shared goals between funders and grantees. They'll also discuss the importance of grant stewardship that includes opportunities for greater levels of funder engagement over the long-term. **Christina Bologna**, *Community Relations Officer, The Cooperative Bank of Cape Cod*; **Beth Bowman**, *Director of Community Impact, Cape and Islands United Way*; **Shawna Moos**, *Director of Marketing & Strategic Initiatives, Housing Assistance Corporation (HAC)*; **Carrie Thornburg-Bearse**, *Program Officer, The Cape Cod Foundation*

The Bass River Room

### TELLING STORIES THAT RESONATE: BUILDING A MEASURABLE CONTENT MARKETING STRATEGY

Content is the core of a strong marketing program in every industry. Your audience wants to be informed, not sold to. A successful content strategy is creating stories that resonate with your audience and inspire them to support your cause. We will discuss how to create a formula that works within your organization's resources and how to define and measure success.

**Catherine Weber**, *Director of Marketing, Alpha Analytical*

The Cape Cod Room

## 4:30 - 5:30 pm - Cocktail Party Reception & Drawing for Mini-Grants - Exhibitors' Hall

After registering, please proceed directly to your first session!

**GEEKING OUT ON DATA**

Fundraising is often described as a little bit art and a little bit science. In this session, we will look at the science part of the equation and how it informs the art portion of the formula. We will examine how we define data, how we gather and track it, and share ideas on how to best use it to inform strategy. Working knowledge of advanced calculus is not required for this session, but a sense of humor is. **Amy Burke**, *Managing Director, Direct Marketing and Participation, Harvard College Fund, Harvard University*

The Centerville Room

**HOW TO WIN SPONSORS AND INFLUENCE PHILANTHROPY!**

Come and listen to the tales of sponsorship from both the non-profit organization and business perspective to learn how to grow or launch a successful sponsorship program. A well thought-out plan for sponsorship can benefit both the non-profit agency as well as the sponsor themselves. **Jennifer Bryant**, *Philanthropic Officer, Cape Cod Commercial Fishermen's Alliance*; **Matt Cole**, *President & CEO, Cape Associates, Inc.*; **Judy Tarr**, *Owner/Proprietor, Ben & Jerry's North Eastham*; **Anne Van Vleck**, *Chief Development Officer, Housing Assistance Corporation (HAC)*

The Hyannisport Room

**YOUTH SESSION! FURTHERING YOUR IMPACT IN THE COMMUNITY**

How can students create fundraising ideas to support causes that they believe in? This session will be an interactive exchange between students and presenters – sharing ideas and exploring fundraising possibilities to support community organizations and causes. Participants will brainstorm ideas on how they can create an event (or something else) that raises awareness, generates financial resources, and identifies potential volunteers. They will also have the opportunity to hear from a young philanthropist who will talk about the impact she made and why it is so important to her.

The Orleans Room

8:45 - 10:00 am

**UNCHARITABLE** - Dan says that the way we think about charity undermines the causes we love. His immersive keynote address, based off of his book, *“Uncharitable: How Restraints on Non-profits Undermine Their Potential,”* will change the way we look at giving. In fact, some experts believe that that the book “deserves to become the nonprofit sector’s new manifesto.” This presentation is recommended for any and every audience of donors, board members and non-profit staff.

**50 DIRECT MAIL AND EMAIL HACKS TO IMPROVE ANNUAL GIVING**

Improve your direct mail and email fundraising results. Fifty easy-to-implement “hacks” backed by neuroscience, behavioral psychology, A/B testing, the experiences of non-profits, and recommendations of the field’s biggest experts. You’ll leave with a copy of Gary Henricksen’s booklet with all the information, research and examples. **Sarah Gnerre**, *Vice President of Philanthropy, Five Maples Development Communications*; **Gary Henricksen**, *President, Owner, Consultant, Five Maples Development Communications*; **Stacey Price**, *Director of Development and Marketing, Dakin Humane Society*

The Centerville Room

**LEARNING AND LEADING THROUGH ORGANIZATIONAL TRANSITION**

Many non-profits on the Cape are experiencing – or are anticipating – leadership or other types of significant change. Learn from Cape non-profit leaders who have recently moved into their roles, about what works, what doesn’t, and how to deal effectively with the human, organizational and financial challenges this kind of change brings. They’ll talk about the challenges of leading in times of change, working with boards and staff, and more. **Adam Burnett**, *Executive Director, Champ Homes*; **Lisa Guyon**, *Executive Director, WECAN*; **Jonathan Sproul**, *President & CEO, Cape Abilities*

The Hyannisport Room

1:30 - 2:45 pm

**6 WAYS TO BEGIN YOUR PLANNED GIVING PROGRAM**

Estate planning, appreciated assets, IRAs and insurance – Join us and learn more about structuring and marketing your planned giving program. Learn the questions to ask, and establish what can often be a transformational source of revenue that can secure the future of your organization, while creating a meaningful legacy for your donors. This session is perfect for non-profit professionals who have always wanted to create a Planned Giving Program but didn’t know where to start. We’ll share tips so you can craft a meaningful program and start the path to transformational gifts. **J. Christopher Boyd**, *Owner, Asset Management, LLC*  
**Atty. F. Keats Boyd, III**, *President, Law Offices of Boyd & Boyd, P.C.*

The Centerville Room

**HOW TO MAKE YOUR MID-LEVEL DONOR PROGRAM A SUCCESS – RESULTS, HABITS, AND COMPONENTS**

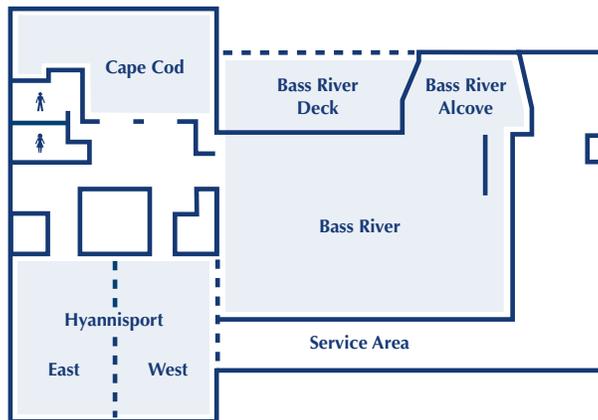
Mid-level donor programs are an important element of both fundraising strategy and revenue. This session will review the benefits of a mid-level giving program and highlight key habits, strategies, components and metrics that you can ascribe to serving the mid-level donor population. **Anne Morrison**, *Principal, Anne Morrison Consulting*  
**Amy O’Connor**, *Analytics Consultant, Blackbaud*

The Hyannisport Room

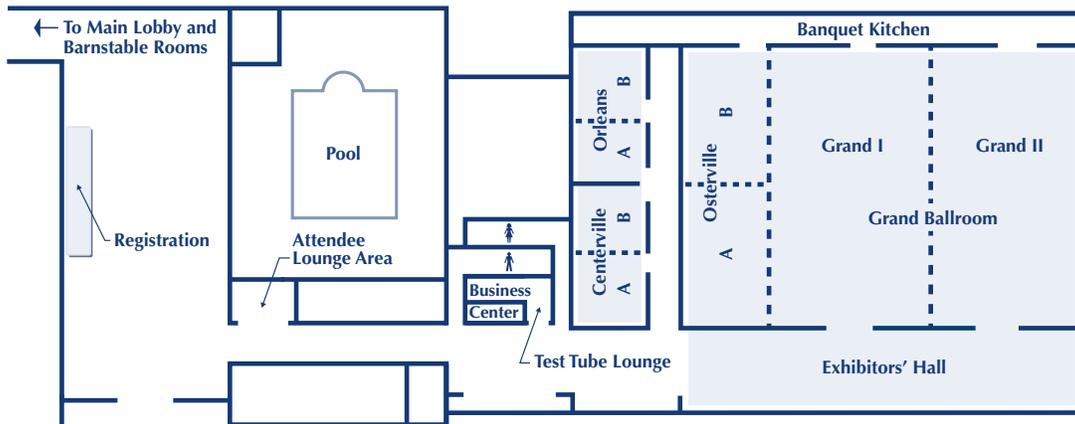
3:15 - 4:30 pm



## Conference Center Meeting Rooms



Second Level



First Level

### 2019 In-kind Sponsors

Meet the Geeks at The Test Tube Lounge! 10 am - 4 pm • Powered by the Cape Cod Technology Council  
 Stop by this interactive help desk for some tech assistance! Chat with your own technology coach and troubleshoot problems or challenges you or your organization is facing.



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- Websites • Social media
- Graphic design • Security
- Computer help



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

### Join us for the Cocktail Party in the Exhibitors’ Hall

Members of *Philanthropy Partners of the Cape and Islands* are eligible for a Mini-Grant Drawing at the Cocktail Party! Drop your business card into the barrel drum on your way to the Cocktail Party at 4:30 - 5:30 PM in the Exhibitor Hall. You must be a current PPCI member and present to win!

*Today’s mini-grant drawing is made possible by a grant from the Bilezikian Family Foundation and a donation - in lieu of speaker gifts- from Philanthropy Partners of the Cape and Islands!*

- Must be present at the Cocktail Party 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 non-profit member and are one of the winners, you may designate your grant to be awarded to a PPCI non-profit organization!
- Only one mini-grant will be given per organization.
- Winning organization must be a registered 501(c)3

## 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 \$80 annually. As a member you save \$20 on Philanthropy Day, and you are invited to attend quarterly luncheons and workshops at no additional cost!*

*Philanthropy Partners of the Cape and Islands (PPCI) looks forward to seeing everyone at some wonderful events in 2020, the schedule is listed below. **Learn More or Sign up at [www.capecodgiving.org](http://www.capecodgiving.org).***

### 2020 Event Schedule

- **January 29** ..... Annual Meeting – *Lunch*
- **March 31** ..... Evening Networking – *Mid-Cape*
- **April 14** ..... Quarterly Event – *Breakfast*
- **June 9** ..... Quarterly Event – *Lunch*
- **June 23** ..... Evening Networking – *Upper-Cape*
- **September 15** ..... Quarterly Event – *Breakfast*
- **September 29** ..... Evening Networking – *Lower/Outer-Cape*
- **November 10** ..... **Philanthropy Day 2020**

### Help us spread the word!

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





# Special Thanks to Our Supporters!

**OUR FLAGSHIP  
EVENT!**

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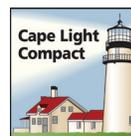
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