

Nonprofit Summit



**Empower Your Nonprofit with
Volunteer, Resource & Board Development**

Sponsored by



in partnership with



***March 25, 2009
8 am - 4 pm***

***Mount St. Mary's University
Frederick Conference Center
5350 Spectrum Drive
Frederick, MD 21703***

***12 Local, Low-Cost Workshops with
Renowned Experts for Board Members,
Executives, Marketing-Fundraising
Professionals & Volunteer Managers!***



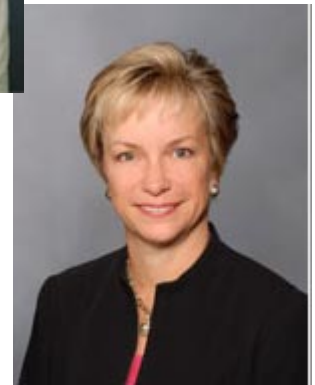
JOIN US FOR A DAY OF NONPROFIT EMPOWERMENT!

Thanks to the vision and generosity of the **Ausherman Family Foundation**, you're invited to become inspired and empowered by renowned experts in the fields of volunteer, resource and board development. Whether you are a board member, executive, volunteer manager or marketing/development professional, this local, low-cost *Nonprofit Summit* will help build the capacity of your government or nonprofit organization.

Leaders from the Ausherman Family Foundation, The Community Foundation of Frederick County and Volunteer Frederick have recruited expert and engaging presenters and panelists for a catalyzing day that includes a keynote address by Susan Ellis of Energize, Inc, 12 workshops, and a lunch time panel discussion with local community leaders. You can't beat the price -- your nominal \$50 fee includes all this plus a continental breakfast and catered lunch! And you won't have to travel to benefit from our impressive team of presenters--it all takes place at the Frederick Campus and Conference Center of Mount St. Mary's University.



*Marvin Ausherman,
Founder and
Chairman, and Lisa
Ausherman, Co-
Founder, Ausherman
Family Foundation*



We want your board members! The Ausherman Family Foundation knows how critical effective board leadership is to the success of any organization. As a special incentive, staff members who bring a board member with them to the Summit receive a \$10 discount.

Co-coordinators Betsy Day, President of the Community Foundation, and Lisa Orr, Executive Director of Volunteer Frederick, honor the commitment of the Ausherman Family Foundation to Frederick County's critical social infrastructure. Their support has made this Nonprofit Summit possible.

FACILITIES & DIRECTIONS

The Mount St. Mary's University Frederick Campus and Conference Center is conveniently located off Rt. 355 near the Francis Scott Key (FSK) Mall. The Conference Center provides state-of-the-art meeting facilities with large comfortable meeting rooms and plenty of free parking.

Directions:

From Downtown Frederick: Take Market St. (Rt. 85) S towards Urbana. After crossing I-70, stay straight onto Rt. 355 S. Go 1.5 mi. Turn right onto Holiday Drive. At traffic circle, go 3/4 the way around onto Spectrum Drive. Mount St. Mary's is the first building on right.

From Northern Frederick County: Take Rt. 15 S to I-270 S. Take EXIT 31A. At the first light (Spectrum Drive) turn right into FSK Mall. Continue on Spectrum Drive to the traffic circle. Go straight, 180 degrees around the circle. Mount St. Mary's is the first building on right.

From the Southeast: Take I-270 N to EXIT 31A (Rt. 85 North, Market St.) At the first light (Spectrum Drive) turn right into FSK Mall. Continue on Spectrum Drive to the traffic circle. Go straight, 180 degrees around the circle. Mount St. Mary's is the first building on right.

From Baltimore & East: Take I-70 W to EXIT 54-Market St., Rts. 355 & 85. Follow signs to Rt. 355 S. Go 1.5 mi., then turn right onto Holiday Drive. At the traffic circle, go 3/4 the way around onto Spectrum Drive. Mount St. Mary's is the first building on the right.




From Hagerstown & West: Take I-70 E to EXIT 54. Follow directions immediately above.

OVERVIEW OF THE DAY



- 7:45 – 8:15 am:** Registration & Continental Breakfast
- 8:15 – 8:45 am:** **Keynote Speaker: Susan Ellis, Energize, Inc.**
Raise People as Well as Funds: Attracting Community Energy
Money isn't enough—and in today's economy may be harder to find. Organizations also need a wide range of activists to support their work. Yet too often the subject of volunteer engagement never reaches the executive suite or the boardroom. Yes, volunteers. Community members who can share talents and skills with clients and staff, educate the public, advocate for your cause. Broaden your vision of what "mobilizing community resources" really means.
- 9:00 – 10:15 am:** Concurrent Workshops on Volunteer, Resource & Board Development
- 10:30 – 11:45 am:** Concurrent Workshops on Volunteer, Resource & Board Development
- Noon – 1:00 pm:** **Lunch & Panel Discussion**
Your Board at Work -- Catalysts for Resource Development
Panelists: *Marvin Ausherman, Ausherman Family Foundation; Michael G. Day, Esq., Law Office of Michael G. Day & Associates; Karlys Kline, Women's Giving Circle of Frederick County*
- 1:15 – 2:30 pm:** Concurrent Workshops on Volunteer, Resource & Board Development
- 2:45 – 4:00 pm:** Concurrent Workshops on Volunteer, Resource & Board Development

CONCURRENT WORKSHOPS

 VOLUNTEER DEVELOPMENT	 RESOURCE DEVELOPMENT	 BOARD DEVELOPMENT
<p><i>Susan Ellis</i></p> <p>9:00 - 10:15 a.m.</p> <p>✓ From the Top Down: The Role of the Executive in Successful Volunteer Involvement</p>	<p>9:00 - 10:15 a.m.</p> <p>✓ Giving Circles <i>Buffy Beaudoin-Schwartz</i></p>	<p>9:00 - 10:15 a.m.</p> <p>✓ Roles & Responsibilities of the Board of Directors <i>Patricia Schwartz</i></p>
<p>10:30 - 11:45 a.m.</p> <p>✓ Do's & Don'ts of Recruiting Volunteers Online</p>	<p>10:30 - 11:45 a.m.</p> <p>✓ Grant Writing <i>Patricia Schwartz</i></p>	<p>10:30 - 11:45 a.m.</p> <p>✓ Building Powerful Boards that Can Fundraise <i>Ted Hart</i></p>
<p>1:00 - 2:15 p.m.</p> <p>✓ Boomers & Millennials: A Shared Perspective on Volunteering</p>	<p>1:00 - 2:15 p.m.</p> <p>✓ Solid Advice for Succeeding On-line <i>Ted Hart</i></p>	<p>1:00 - 2:15 p.m.</p> <p>✓ Getting the Board You Want <i>Patricia Schwartz</i></p>
<p>2:30 - 3:45 p.m.</p> <p>✓ Fresh Approaches to Designing Volunteer Roles</p>	<p>2:30 - 3:45 p.m.</p> <p>✓ The Psychology of Making the Ask <i>Greg Powell</i></p>	<p>2:30 - 3:45 p.m.</p> <p>✓ Board Self Assessment <i>Patricia Schwartz</i></p>



WORKSHOP DESCRIPTIONS

VOLUNTEER DEVELOPMENT TRACK *WITH SUSAN ELLIS*

From the Top Down: The Role of the Executive in Successful Volunteer Involvement

We'll examine what top management needs to do to lay the foundation for the best possible engagement of volunteers. Daily volunteer management can be delegated, but it takes executive action to develop policy, set goals and objectives, allocate resources, assure strong volunteer/employee teamwork, and evaluate accomplishments. How often do *you* put volunteering on your agenda? Here's why and how you should.

Do's and Don'ts of Recruiting Volunteers Online

The web has revolutionized most things and volunteer recruitment is no exception. In this session, we'll consider the array of free online volunteer opportunity registries, the ways social networking sites can spread the word for you, and the critical importance of how volunteers are portrayed (or even visible) on the organization's own web site.

Boomers & Millennials: A Shared Perspective on Volunteering

We've been inundated with data about Baby Boomers for several years and now we're learning about Generation Y or the Millennials. In this session we won't dwell on statistics but will consider the changes both paid and unpaid work needs to make to attract and keep different generations. And guess what? Those over 50 and those under 30 are more alike than different! What does this mean to volunteer involvement?

Fresh Approaches to Designing Volunteer Roles

It's not your grandmother's volunteering any more (and maybe never was)! What you ask volunteers to do directly leads to what types of people you'll attract to do it. Stop limiting yourself to "assisting the paid staff" and consider creative ways to tap community resources on behalf of your mission. Offer as many options as possible, including virtual assignments, short-term projects, and more. Come and learn how.

RESOURCE DEVELOPMENT TRACK

Giving Circles: The Value in Giving Together - Buffy Beaudoin-Schwartz

Often described as a "social investment club," a giving circle is a pooled fund through which donors make grants together, and are considered a valuable philanthropic vehicle for donors, host institutions, and the broader community. Learn the latest statistics on giving circles in our region and across the country, how to start a giving circle, and special considerations for host organizations.

Grant Writing - Patricia Schwartz

Writing successful grants is a process of thinking of the future. A well-written grant proposal reflects a clear understanding of program and finance and answers the funder's call for innovative programs with high impact results. This seminar will provide concrete information for developing successful funding proposals, and methods for working with program staff to develop outstanding program proposals.

Solid Advice for Succeeding Online - Ted Hart

This session will prepare key nonprofit administrators to make best use of the Internet to build community, communicate with supporters and raise funds online. Do you know the ten fundamentals of fundraising on the Internet and the Tips for Online Giving? By the end of this session you will! This high-energy session is a must for everyone currently engaged on the web and those who are thinking about it.



The Psychology of Making “The Ask” - Dr. Greg Powell

Our thoughts determine our feelings and actions – and how effectively we “ask.” In this interactive workshop, we will discuss the states of mind that lead to successful “asking” – and the states of mind that don’t. Participants will explore their own thoughts in fundraising situations and learn the approaches of expert fundraisers. Success begins with a better understanding of the most powerful fundraising tool in the world – your mind.

BOARD DEVELOPMENT TRACK

Roles and Responsibilities of the Board of Directors – Patricia Schwartz

What are the basic responsibilities of nonprofit boards? What are the fiduciary responsibilities of board members? What are the responsibilities of individual board members? Why do nonprofits have boards, and what do boards do? How do boards get the work done that confronts them? How and who holds board members accountable for their work? These and other questions you have about board roles and responsibilities will be addressed in this seminar.

Building A Powerful Board that Can Fundraise – Ted Hart

Great board members are not born, they are trained, and supported in their duties. This presentation is recommended for all levels of board sophistication: a good “jump start” for boards that are reluctant to get involved in fund and donor development; and a great management tool for those already involved. Each participant will receive draft policy options, organizational structure and other tools that will help them develop effective board/staff relationships and enable board members to function as effective fundraisers. Best practices and references provided will help the participant develop a strategy to build a power board. This is a mind-shifting workshop that can lead to much greater engagement from your boards.

Assessing the Board: Board Self Assessment – Patricia Schwartz

One of the most critical steps in continuing the development of a new or existing board is board self evaluation. Knowing the board’s strengths and opportunities, strategically selecting board members and finding the best match for the needs of the organization are key to building a great board. This seminar will provide a tool and rationale to guide the organization in building the very best board it can.

Getting the Board You Need: Nominating - How it is done & who does it – Patricia Schwartz

The strongest organizations are those that exhibit dynamism, responsiveness to the community and have a board that is fully committed to the mission and vision of the organization. But, how do you get the board that you need? The role of the Nominating Committee of the Board of Directors and how it accomplishes the task of getting the right people engaged with your organization will be discussed in this seminar. Methods for recruiting and evaluating potential board members will be discussed, as will appropriate orientation procedures and materials. Bring your questions and concerns.



PRESENTERS

Susan J. Ellis is President of Energize, Inc., a training, consulting, and publishing firm that specializes in volunteerism. She founded the Philadelphia-based company in 1977 and since that time has assisted clients throughout North America, Europe, Asia, Latin America, Australasia, and Israel to create or strengthen their volunteer corps.

Susan is the author or co-author of twelve books, including *From the Top Down: The Executive Role in Volunteer Program Success* and *The Volunteer Recruitment (and Membership Development) Book* - several of which have been translated into Japanese, Taiwanese, French, and Italian. From 1981 to 1987, she was Editor-in-Chief of *The Journal of Volunteer Administration*. She has written more than 120 articles on volunteer management for dozens of publications and writes the national bi-monthly column, "On Volunteers," for *The NonProfit Times*.

Susan is committed to exploring the potential of cyberspace for the volunteer field. The Energize web site (www.energizeinc.com) has won international recognition as a premier resource for volunteer program leaders and includes an online bookstore selling over 80 titles in electronic form. She co-authored *The Virtual Volunteering Guidebook*, which is available for free download on the Energize web site. In 2000, she and Steve McCurley launched the field's first online journal, *e-Volunteerism: The Electronic Journal of the Volunteer Community*, www.e-volunteerism.com, for which she serves as editor. And in 2005, Susan and Betty Stallings introduced the *Everyone Ready®* program, providing electronic staff development in volunteer management for national organizations.

She was the recipient of the Association for Volunteer Administration's 1989 Harriet Naylor Distinguished Member Service Award. The *BetterWorldHeroes* web site has included her on their calendar of "heroes" for December 5 (International Volunteer Day). Susan is an active volunteer in a variety of volunteerism associations and several Philadelphia-based community groups.



Buffy Beaudoin-Schwartz, Communications Director, Association of Baltimore Area Grantmakers, has experience working directly with individual donors, corporate, private, community and public foundations, and with nonprofit organizations. She has particular expertise in the development and growth of donor collaboratives, or giving circles. Previously, Buffy served as the Director of the Baltimore Giving Project at ABAG since its inception in 1999. In this capacity, she managed the development, implementation and growth of this \$1.2 million project to increase philanthropy in the region.

Buffy wrote a column in *SmartWoman Magazine* called "Philanthropically Speaking" and is the author of dozens of published articles. She co-authored of "A Plan of One's Own: A Woman's Guide to Philanthropy", co-author of "Growing Philanthropy Through Giving Circles; and a chapter in "The Transformative Power of Women's Philanthropy". Buffy was chosen as one of Maryland's Top 100 Women in 2003 & 2008 by *The Daily Record*, an "Innovator of the Year" 2004 by *The Daily Record* for her work with giving circles, and one of "40 Under 40" 2004 by the *Baltimore Business Journal*. She is a founder and current chair of the Women's Giving Circle of Howard County (WGC) and the B'MORE Fund at the Baltimore Community Foundation. She is a trustee of the Columbia Foundation, Howard County's Community Foundation and received her BA in Russian History from the University of Maryland.

Ted Hart, ACFRE, ePMT is considered one of the foremost experts in both online and traditional fundraising around the world. He is sought after internationally as an inspirational and practical speaker and consultant on topics related to nonprofit strategy and board/volunteer development both online and offline. He serves as CEO of Hart Philanthropic



PRESENTERS



Services, (www.tedhart.com) an international consultancy to nonprofits/NGOs, providing serious solutions to nonprofit challenges both online and offline. He has inspired the creation of People to People Fundraising, a movement housed online at www.p2pfundraising.org. He is also Founder of the international ePhilanthropy Foundation, the global leader in providing training to charities for the ethical and efficient use of the Internet for philanthropic purposes through education and advocacy. Hart has served as CEO of the University Maryland Medical System Foundation, and before that as Chief Development Officer for Johns Hopkins Bayview Medical Center.

He has been certified as an Advanced Certified Fund Raising Executive (ACFRE) by the Association of Fundraising Professionals (AFP) and an ePhilanthropy Master Trainer (ePMT) by the ePhilanthropy Foundation. Mr. Hart also serves as a national member to the Giving USA Advisory Council at the Center on Philanthropy, and as an adjunct faculty member to the Master of Science in Fundraising Management program at Columbia University.

Hart is editor and author of the books, "[Major Donors – Finding Big Gifts In Your Database and Online,](#)" "[Nonprofit Internet Strategies Best Practices for Marketing, Communications and Fundraising Success](#)" "[Fundraising On The Internet: The ePhilanthropy Foundation.Org's Guide To Success Online,](#) a contributing author to [Achieving Excellence in Fund Raising Second Edition](#) .and and his new book [People to People Fundraising: Social Networking and Web 2.0 for Charities.](#)



Gregory H. Powell, Ph.D. is an organizational and clinical psychologist practicing in Frederick, Maryland and the surrounding region. His management consultation specialties include executive development and coaching, personnel assessment, organizational assessment and change, strategic planning, and team development. His clinical specialties include treatment of mood disorders (anxiety and depression), marital difficulties, and work/life balance. He earned his B.A. at Brown University and his M.A. and Ph.D. at the University of Maryland.

He co-founded Frederick Psychology Center, where he has practiced clinical psychology since 1985. Developing his long-term interest in organizational consultation, Dr. Powell began consulting with businesses in 1994, then teamed up with Suzanne Dyer-Gear to form Powell & Dyer-Gear Consulting in 1998. Along the way, he has pursued advanced training in organizational consultation at the University of Maryland, Harvard University (Continuing Education), the

National Training Laboratories, the Center for Creative Leadership, and the American Psychological Association .

Patricia B. Schwartz, M.Ed, CFRE is president of Patricia B. Schwartz & Associates (PBSA), a central Pennsylvania consulting firm specializing in improving communities through the strategic development of effective public private partnerships, funding applications, positioning strategies, and quality improvement initiatives. PBSA clients range from small nonprofits to large hospital systems, public broadcasting networks, museums, foundations, and professional associations. Patti Schwartz holds a Masters degree from Duquesne University, and is a Certified Fund Raising Executive (CFRE).

Schwartz served for more than 12 years as the CEO of a major nonprofit in the Harrisburg, PA region. As a development professional, Schwartz has written and/or edited more than \$40 million of grant proposals and tax credit applications with a 93% success rate, led a \$10.5 million capital campaign, and designed and developed numerous special events.

Early in her career, Schwartz founded and directed, through the Community College of Allegheny County, the largest nonprofit leadership training institute in the United States at that time. Through this project, she designed and delivered training programs in board development, resource development, strategic and operational planning, organizational audit, evaluation, supervision of personnel, financial development and community relations and marketing.



NONPROFIT SUMMIT REGISTRATION FORM



Name: _____
 Title: _____
 Organization: _____
 Address: _____
 City/State/Zip: _____
 Phone: (wk) _____ (c) _____
 Email: _____
 Please indicate any special needs: _____

I am a ___ Staff Member ___ Board Member ___ Volunteer

FEES: \$50 per person

Fee includes continental breakfast and lunch.

Make checks payable and mail to:

The Community Foundation of Frederick County
 312 East Church St.
 Frederick, MD 21701

Incentive! \$10 discount for nonprofit staff member accompanied by one or more registering board members!
 Board Member Name(s): _____

BREAKOUT WORKSHOP PREFERENCES

(indicate first choice with a "1" and second choice with a "2" for each time slot)

VOLUNTEER DEVELOPMENT

Susan Ellis

9:00 - 10:15 a.m.

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