

**SHARE.
LISTEN.
RECEIVE.**



**MIE NATIONAL
FUNDRAISING
CONFERENCE
JULY 20–22, 2016**

PROGRAM

SEE A PROGRAM AT-A-GLANCE ON PAGES 2-3

SEE ONLINE CONFERENCE SCHEDULE AT:

[HTTPS://MIEFUNDRAISINGCONFERENCE.SCHED.ORG](https://miefundraisingconference.sched.org)

CONFERENCE MATERIALS AVAILABLE AT: MIELEGALAID.ORG/LIBRARY

 CONFERENCE TWITTER HASHTAG: [#MIECHICAGO16](https://twitter.com/MIECHICAGO16)



MANAGEMENT | INNOVATION | EXCELLENCE | FOR LEGAL AID

MIELEGALAID.ORG

CONFERENCE AT-A-GLANCE

WEDNESDAY, JULY 20, 2016

8:15 am–4:00 pm	Strategic Communications Training — Voices for Civil Justice , pre-registration required, training is now full
6:00 pm	Informal gathering of attendees — Meet at hotel bar, for drinks and to make dinner arrangements with colleagues

THURSDAY, JULY 21, 2016

7:30–8:00 am	First-timers Registration, Continental Breakfast , <i>Fender Prefunction</i>			
8:00–8:50 am	First-timers Orientation — Experienced fundraisers who are new to legal aid, <i>Byrdland</i> — Experienced legal aid folks who are newer to fundraising, <i>Les Paul</i>			
8:00–8:50 am	General Registration , Continental Breakfast, <i>Fender Prefunction</i>			
9:00–10:30 am	Welcome to the MIE 2016 National Fundraising Conference Opening Plenary: Becoming an Agile Fundraiser and Leader , with <i>Tasneem K. Goodman</i> , <i>Fender 1 & 2</i>			
10:30–10:45 pm	Break			
10:45–12:15 pm Break-out Sessions	Trends in Legal Community Giving to Legal Aid — Strategies to Help You Successfully Engage Law Firms and Lawyers <i>(For All)</i> <i>Fender 1 & 2</i>	Encourage a Culture that Supports Development <i>(Skills Development)</i> <i>Byrdland</i>	Searching for Your Optimal Fundraising Mix? Start with a Good Plan <i>(For All)</i> <i>Les Paul</i>	ICYMI: How to Navigate the Currents of Social Media — and Stay Afloat <i>(For All)</i> <i>Fender 3</i>
12:15–1:45	Have lunch on the town with a colleague			
1:45–3:15 pm Break-out Sessions	Foundations — Expanding Support from Foundations by Researching Priorities, Building Relationships and Demonstrating Impact <i>(For All)</i> <i>Les Paul</i>	Find and Retain Donors <i>(Skills Development)</i> <i>Fender 3</i>	Major Gifts Bootcamp <i>(More Advanced)</i> <i>Fender 1 & 2</i>	Not Your Parents' Wallet: A Three-Step Plan to Reach Today's Donors <i>(For All)</i> <i>Byrdland</i>
3:15–3:30 pm	Break			
3:30–5:00 pm Break-out Sessions	How to Most Effectively Engage the Corporate Sector <i>(For All)</i> <i>Fender 1 & 2</i>	Develop Strategies for Annual Giving <i>(Skills Development)</i> <i>Byrdland</i>	Mobilizing Your Board to Use Their Strengths and Grow Your Mission <i>(More Advanced)</i> <i>Les Paul</i>	Identifying and Addressing Implicit Biases in Fundraising <i>(For All)</i> <i>Fender 3</i>

Continued

6:00 pm	Dinner: Dinner on your own, or sign up for one of the “dinner groups” that will be announced and organized at the Thursday morning plenary. Informal gathering for drinks in the hotel bar.
---------	--

FRIDAY, JULY 22, 2016

7:30 – 9:00 am	Continental Breakfast , <i>Fender Prefunction</i>			
8:00 – 8:45 am	Thirty Minutes with a Mentor , <i>Fender Prefunction</i> , must be pre-registered			
9:00 – 10:30 am Break-out Sessions	StoryCorps (session will be repeated at 10:45; must pre-register) <i>(For All)</i> <i>Fender 1 & 2</i>	Telling Our Story and Inspiring Audiences <i>(Skills Development)</i> <i>Byrdland</i>	Fatigue, and Burnout, and Roadblocks, Oh My! <i>(More Advanced)</i> <i>Fender 3</i>	BIG, Short-term Restricted Funding – Getting and Managing <i>(For All)</i> <i>Les Paul</i>
10:30 – 10:45 am	Break			
10:45 – 12:15 pm Break-out Sessions	StoryCorps (earlier session repeated; must pre-register) <i>(For All)</i> <i>Fender 1 & 2</i>	“Have to Ask to Receive:” Sharpen Your Skills in Making the Ask <i>(Skills Development)</i> <i>Byrdland</i>	Endowments and Reserves <i>(More Advanced)</i> <i>Les Paul</i>	Intimate Events – For Cultivation, Fundraising and Stewardship <i>(For All)</i> <i>Fender 3</i>
12:15 – 1:45 pm	Have lunch on the town with a colleague			
1:45 – 3:15 pm Break-out Sessions	Inspire Giving Through Shifting the Conversation <i>(For All)</i> <i>Fender 1 & 2</i>	Create a Sizzling Comprehensive Development Plan (Before You Go Home) <i>(Skills Development)</i> <i>Byrdland</i>	Transforming Data into Dollars: Getting the Most Out of Your Organization’s Advocacy Work <i>(For All)</i> <i>Les Paul</i>	Your Executive Director or Director of Development Is Leaving – Are You Prepared? A Panel Discussion from Those Who Have Experienced This Critical Transition <i>(For All)</i> <i>Fender 3</i>
3:15 – 4:00	Wind-down time in the hotel bar, for those with some time before their plane flights!			

KEY to Session Levels:

FOR ALL — Everyone will benefit from the teachings of this session

SKILLS DEVELOPMENT — This session teaches a specific valuable skill

MORE ADVANCED — Move beyond the basics in this session

First-timers Registration, Continental Breakfast

Thursday, July 21, 2016, 7:30–8:00 am, Fender Prefunction

First-timers Orientation

Thursday, July 21, 2016, 8:00–8:50 am

- Experienced fundraisers who are new to legal aid, *Byrdland*
- Experienced legal aid folks who are newer to fundraising, *Les Paul*

General Registration, Continental Breakfast

Thursday, July 21, 2016, 8:00–8:50 am, Fender Prefunction

Opening Plenary: Becoming an Agile Fundraiser and Leader, with Tasneem K. Goodman, Managing Director, Akina, a GrowthPlay Company

Thursday, July 21, 2016, 9:00–10:30 am, Fender 1 & 2

Tasneem K. Goodman will:

- Introduce a framework for self-assessment and reflection about one's own leadership style, values and strengths, and an appreciation for how we fit into the big picture of the organizations we serve
- Provide practical tools and tactics to help fundraisers create and deepen relationships which motivate people to action
- Give fundraisers the foundation and skills to create new opportunities for partnership, idea sharing, accountability and support
- Put us in a frame of mind to fill up our toolkit and spirit

In her role at Akina, Tasneem is committed to helping professionals and firms realize greater success and satisfaction by serving their clients well, growing their businesses through authentic relationships and leading their organizations with a spirit of generosity. Prior to joining Akina, Tasneem was a partner and the Director of Marketing at Katten Muchin Rosenman, a global law firm, where she led the firm's marketing and business development team, overseeing all aspects of the firm's marketing, business development, client relations and public relations initiatives.

Trends in Legal Community Giving to Legal Aid – Strategies to Help You Successfully Engage Law Firms and Lawyers

Thursday, July 21, 2016, 10:45–12:15 pm, Fender 1 & 2

Although most legal aid programs spend a lot of time working to increase giving from the legal community, the results

often are not as positive as we would like. What does it take to be really successful in generating consistent, substantial, and increasing support from lawyers and law firms? This panel, which includes partners from supportive firms and legal aid leaders who have been successful in engaging the private bar, will share insights into what works, what doesn't, and what you can do to most effectively increase funding and from the legal community.

MODERATOR:

Meredith McBurney, Resource Development Consultant, MIE

Meredith McBurney has spent over 35 years working with and for legal aid and access to justice organizations as a staff person, consultant and volunteer, specializing in resource development. In her current role as resource development consultant to MIE, she works on the design and implementation of MIE's resource development activities, as well as providing in-depth consulting to individual programs. She also works with the ABA Resource Center for Access to Justice Initiatives, researching and analyzing fundraising trends and practices within legal services nationwide, and using the information she gains to provide information, training and technical assistance to bench, bar and legal aid leaders throughout the country. From 1981 to 1997, Meredith served as the executive director for Colorado's IOLTA program and the Legal Aid Foundation, Colorado's statewide fundraising organization. Before that, she was the administrator for Colorado Rural Legal Services.

PRESENTERS:

Jennifer Bentley, Chief Development Officer, Michigan Advocacy Program

Jennifer Bentley has been with legal aid since graduating from law school in 1997 and is now the Chief Development Officer at the Michigan Advocacy Program. The Michigan Advocacy Program is the umbrella organization for Legal Services of South Central Michigan, Farmworker Legal Services and several statewide advocacy programs including the Michigan Poverty Law Program, the Michigan Immigrant Rights Center, Michigan Elder Justice Initiative and Michigan Law Help. Jennifer is responsible for grants and fundraising for LSSCM's field offices and statewide programs — with a combined budget of \$7.4 million. Jennifer has significant experience fundraising from lawyers and law firms in several communities in Michigan. Jennifer works closely with the Access to Justice Campaign, a partnership with the State Bar of Michigan, the Michigan State Bar Foundation and the civil legal aid programs in Michigan.

David Collins, Attorney, Quinn, Johnston, Henderson, Pretorius & Cerulo, Peoria, IL

Dave Collins has been with the Quinn, Johnston, Henderson, Pretorius & Cerulo law firm in Peoria, Illinois, for nearly 25 years. His practice is concentrated in the defense of cases in-

volving personal injury and wrongful death and representing the interests of employers in employment-related matters. He has served as a pro bono attorney in many cases over his career and currently serves as the firm's liaison for pro bono matters. Dave has served on Prairie State Legal Services' Board of Directors since early 2012 and as its Chairman of the Development Committee since early 2014.

Thomas Gunning, Director of Program Operations, Greater Boston Legal Services

Thomas Gunning, who joined Greater Boston Legal Services in 2016, focuses on development strategy and program operations for GBLS. Before joining GBLS full-time, Tom served on the GBLS Board of Directors for many years and as Chair of its Development Committee. In his current role, Tom brings more than 25 years of leadership and organizational expertise from serving as General Counsel of a large, international biopharmaceutical company and a Partner at Nixon Peabody LLP. He is a graduate of Fairfield University and Boston University School of Law.

Allegra Nethery, Pro Bono & Philanthropy Partner, Seyfarth Shaw, Chicago, IL

Allegra Nethery is Seyfarth Shaw's full-time Pro Bono and Philanthropy Partner, directing the overall pro bono program in the firm's nine offices throughout the United States, ensuring that legal and staff support is provided to maintain pro bono commitments and identifying additional opportunities for volunteer legal representation. In addition, Allegra oversees the firm's community service activities and manages the Seyfarth Shaw Charitable Foundation, through which attorneys and staff can suggest donations to qualified organizations on behalf of the firm. She works closely with the firm's attorneys and staff to identify regional and national community service and charitable giving opportunities in order to provide the greatest possible benefit to the communities in which Seyfarth does business and the greatest possible support of the charitable and volunteer efforts of the firm's attorneys and staff.

Encourage a Culture that Supports Development

Thursday, July 21, 2016, 10:45–12:15 pm, Byrdland

This session will build skills for those newer to fundraising or legal aid, and interaction is encouraged. A panel of representatives from three legal aid programs will discuss how to assess and encourage a culture of philanthropy. The panel members will tell brief stories to illustrate the challenges, successes and lessons learned with the goal of presenting creative strategies to expand the number of ambassadors for legal aid programs. They will discuss:

- Ideas for how to assess culture in the first 90 days (and later)

- Collaboration among legal aid staff attorneys, executive director and development director
- Role of board members, volunteer attorneys and former clients as ambassadors for legal aid
- Strategies for changing culture

MODERATOR:

Andrea Kaufman, Director, The Fund for Legal Aid, and Development Director, Mid-Minnesota Legal Aid

Andrea Kaufman has been Director of The Fund for Legal Aid and Development Director of Mid-Minnesota Legal Aid since 2011. Prior to joining the staff, she served on the Board of The Fund for Legal Aid for nearly 20 years and was Chair of the Board from 2008 to 2010. Andrea develops and executes strategies for fundraising to support Legal Aid in 20 counties in central Minnesota. With 70 lawyers, Legal Aid is the 12th largest law firm in the state. The Fund for Legal Aid provides \$1.4 million to Legal Aid annually through the One Hour of Sharing Campaign and the Law Day Testimonial Dinner.

During Andrea's legal career, she was District General Counsel for Minneapolis Public Schools (2010-2011) and held various management positions in the legal department at U.S. Bank (1992-2009), including Senior Deputy General Counsel. She was in private practice for several years after graduating from the University of Minnesota Law School in 1985.

PRESENTERS:

Graham Cowger, Director of Development, Maryland Legal Aid

Since 2003, Graham Cowger has been fundraising for a variety of non-profit organizations, including Peace Action, the McLean County Museum of History, the Bloomington Center for the Performing Arts, and Maryland Legal Aid. Having worked as a door-to-door canvasser, telephone fundraising manager, and as a development director, he has acquired a wide variety of experience in assessing and developing a culture of philanthropy in organizations of varying sizes and areas of focus. As a development director for three very different organizations, he has particular experience with increasing board and volunteer participation in fundraising activities, as well working to foster a sense of collective responsibility among staff to serve as vocal advocates for promoting the work and value of each organization. He holds his Bachelor's degree in Communication from Western Michigan University, and lives with his wife and three young sons in Towson, Maryland.

Donna Marino, Director of Development, The Florida Bar Foundation

Donna Marino currently serves as the statewide Development Director for The Florida Bar Foundation. Her responsibilities include strategic planning and implementation of all of the

Foundation's giving programs, including the Fellows program, annual giving, major gifts and planned giving. Her work helps the Foundation provide funding that links 30 legal services programs statewide to form a comprehensive, statewide delivery system.

Donna is experienced in all areas of fundraising, including advisory board management, capital campaigns, major gift solicitation and planned giving. Her enthusiastic, inspired and creative approach contributes to the success of the Foundation's philanthropic objectives. Donna staffs the funding subcommittee for Florida's Commission on Access to Justice. She has served as Central Florida President for the Association of Fundraising Professionals (AFP), board member with the American Association for Women in Community Colleges (AAWCC), advisor to Valencia's inaugural Peace and Justice Initiative Board, and was a member of the Council for Advancement and Support of Education (CASE).

Prior to facilitating access to justice by joining The Florida Bar Foundation in 2014, Donna spent seven years advocating for access to education at Valencia Foundation and earlier served with Valencia College as part of the college and community relations team. In September 2009, Donna was awarded the Certified Fund Raising Executive (CFRE) designation and later obtained her certificate in proposal writing from Rollins College's Edyth Bush Institute for Philanthropy and Nonprofit Leadership. She has obtained a Masters of Business Administration (MBA) and has a bachelors in business management from University of Central Florida (UCF).

Tamara W. Zavislan, Director of Development, Homeless Persons Representation Project

Tami Zavislan joined HPRP in February 2016, bringing considerable non-profit management and fundraising experience to her position as Director of Development. Prior to her work at HPRP, Tami served as the first Executive Director of the Community Foundation of Harford County in Bel Air, Maryland, growing the organization to more than 40 funds and \$1,000,000 in assets under management. She has directed and managed community-based and national programs in Ohio (Cleveland Music School Settlement), Michigan (Center for Creative Studies–Institute of Music and Dance), Pennsylvania (Kardon Institute), and Maryland (American Music Therapy Association, Ignatian Volunteer Corps, Community Foundation of Harford County).

Tami is a member of the Association of Fundraising Professionals (AFP) and currently serves as president of the AFP Maryland Chapter. She is a member of the Women's Giving Circle of Harford County, and she directs the Children's Choir at her church. Tami graduated from Elizabethtown College (B.S., Music Therapy) and later earned a Masters in Management in Business Administration from Penn State University.

Searching for Your Optimal Fundraising Mix? Start with a Good Plan

Thursday, July 21, 2016, 10:45–12:15 pm, Les Paul

Grants, individual fundraising and major gifts, events, foundation grants — Do you have the right mix for your organization? What changes should you make to raise the most funds with your current fundraising resources? When and how do you decide to increase development staff? The answers to these questions may be different for different organizations but a good planning process to figure out the answers should be similar. This session is a chance to learn new ways to plan and make decisions about what improvements are needed to build your fundraising program.

PRESENTERS:

Jane Dewey, Fundraising Management and Consulting, Chicago, IL

For more than 30 years, Jane Dewey has worked in the nonprofit arena, holding positions in management and fundraising. She served as executive director at community-based organizations offering services to victims of domestic violence, developmentally disabled children and the isolated elderly population. She also worked in development leadership positions with Women Employed, Northwestern Memorial Hospital, La Rabida Children's Hospital and Chicago Foundation for Women where she directed annual fundraising programs as well as capital and endowment campaigns. Since 2002, Jane has managed her own fundraising consulting business and has assisted numerous organizations in areas such as strategic fundraising planning, development of new fundraising strategies, particularly in individual giving, board development, creation of fundraising tools, and campaign preparation and implementation.

Michael O'Connor, Executive Director, Prairie State Legal Services

Michael O'Connor is the Executive Director of Prairie State Legal Services, now in his 11th year in this position. Prairie State is the LSC funded program serving northern Illinois; this includes the suburban region surrounding Chicago, several small cities, and a large rural area. Prairie State has had success in conducting annual fundraising campaigns in all parts of its service area, and is now in the midst of efforts to expand its development team in order to commit great resources to securing major gifts.

Jaclyn Piñero, Director of Development, Bay Area Legal Aid

Jaclyn Piñero provides leadership and direction in all individual giving and grant/contract procurement and management for offices across a seven-county service region of the San Francisco Bay Area. Over Jaclyn's 13-year tenure at BayLegal she has grown BayLegal's grants and contracts portfolio from

32 grants totaling \$5.8 million to a portfolio of 80 grants totaling over \$11 million. Jaclyn and her team secure grants in each of BayLegal's five priority areas of law (family law/dv/immigration; housing; health access; benefits access; consumer advocacy) and for target populations including transitional age youth, reentry populations, immigrants, Veterans, and many others. She also works in close collaboration with BayLegal's Board of Directors to secure approximately \$1 million in individual, law firm, corporate and cy pres support.

ICYMI: How to Navigate the Currents of Social Media – and Stay Afloat

Thursday, July 21, 2016, 10:45–12:15 pm, Fender 3

In today's tech-savvy world, it is essential to hook the public, cultivate superfans and sustain engagement with existing supporters through social media. But how? There's an ocean of opinions out there but your social media strategy doesn't have to be a many-headed hydra! In this session, you will gain effective tips to get your staff and leadership plugged in, develop an editorial framework to promote your online presence, identify community organizations successfully using social media (so you don't have to reinvent the wheel) and learn the latest lingo in real time. #WEIN_MIE16.

PRESENTERS:

Hannah Allison, Program Coordinator, Texas Access to Justice Commission and Legal Access Division of the State Bar of Texas

Hannah Allison works on numerous events for the Commission and Division, and she is *the* “woman behind the curtain” of all things *tech* — from designing electronic publications, spearheading website development and maintenance, to being the “face and voice” for our organizations on various social media platforms. When she's not juggling those balls, you'll find her fulfilling her passion for photography with her face behind the lens of a camera. Hannah holds a Bachelor of Fine Arts in Photography from The School of the Art Institute in Chicago.

Carter DeWitt, Chief Development Officer, Jacksonville Area Legal Aid

Carter DeWitt has over 25 years' experience as a successful fundraiser and public relations/marketing officer at the national, state, regional and local levels for a wide variety of nonprofits from economic think tanks and research institutes to those that help children and rescue animals. Expert level in events, direct mail campaigns, acquisition of major gifts, foundation and corporate support, she's taught fundraising courses at the Leadership Institute in Washington, DC. Her book, “The Five Biggest Mistakes of Fundraisers,” is scheduled to be released in October of 2016. She holds a Bachelor of Science, chemistry, from High Point University in North Carolina.

Samantha Krykostas, Development Director, Illinois Legal Aid Online

Samantha Krykostas directs ILAO's fundraising and communications efforts, including donor cultivation and stewardship, foundation and corporate relations, special events, communications and public relations. (Many hats make quick work!) She joined ILAO in 2012 after serving with the Peace Corps in Ukraine. ILAO is a statewide nonprofit that uses technology to help people understand their legal options, make informed decisions and represent themselves in court when a lawyer is out of reach. Samantha holds a BA in English and French from Oberlin College, currently sits on the board of the Armenian International Women's Association, and serves as the Oberlin Club of Chicago's Alumni Regional Coordinator. She speaks French, Russian, Ukrainian and Armenian.

Foundations – Expanding Support from Foundations by Researching Priorities, Building Relationships and Demonstrating Impact

Thursday, July 21, 2016, 1:45–3:15 pm, Les Paul

Foundation revenue has significantly increased in recent years and can be a way to diversify funding and leverage other funding. Many legal aid offices receive grants from national, regional, state and local foundations. Foundations are a great opportunity to fund innovative work and priorities. If you haven't approached a foundation before or if you know there is more potential in the communities you serve, this session is for you. Panelists will cover the necessary steps to engaging a foundation with your work, including — how to identify foundations that might be interested in funding your work, how to take the initial first step to approach a new foundation, how to make the case for support by demonstrating outcomes and impact, and how to develop relationships with program officers so that support might continue. This panel will include both individuals from foundations and from legal aid programs who will share their perspectives and experiences.

MODERATOR:

Mark Marquardt, Executive Director of the Lawyers Trust Fund of Illinois

Mark Marquardt served as the organization's deputy director from 1991–2015, overseeing LTF's grants program and special projects to improve the legal aid system in Illinois. Prior to joining the Lawyers Trust Fund, Mark served as the executive director of the ACLU of Mississippi. He is a former co-chair of the Fund for Immigrants & Refugees, a Chicago-based grant-making collaborative that operated from 1998 to 2002. He is a graduate of Northwestern University.

PRESENTERS:

Marianne Philbin, Executive Director, Pierce Family Foundation

Marianne Philbin continues to serve on occasion as a consultant to other foundations and nonprofit organizations. She has more than 25 years of experience working with foundations and nonprofit organizations on issues related to grant making, evaluation and strategic planning. She is co-author with Marcia Festen of the book *Level Best: How Grassroots Organizations Can Tackle Evaluation and Talk Results* (Wiley Publishing, 2006) and also co-author of *How Effective Nonprofits Work: A Guide for Donors, Board Members and Foundation Officers* (Forum of Regional Associations of Grantmakers, 2002). In addition to her work with foundation and nonprofit clients, she is an instructor and curriculum developer for the Donors Forum of Chicago, where she developed and annually leads the Institute for New Grantmakers.

Most recently for the Pierce Foundation, she spearheaded the creation of the Peer Skill Share program for grantees across the city, and the development of the Chicago Youth Storage Initiative, which provides storage space for youth experiencing homelessness so that they can more securely engage in programs, continue in school, apply for jobs, etc. In the past she served as Development Director for the Chicago Annenberg Challenge, which was part of Walter Annenberg's legacy to improve public education; Executive Director of the Chicago Foundation for Women during its critical start-up years; and Executive Director of The Peace Museum. She has served on nonprofit boards ranging from Amnesty International USA to Chicago Women in Philanthropy, the Chicago Global Donors Network, and Project Exploration. She also served for a number of years as a member of the Governance Committee for the Center for Victims of Torture, located in Minneapolis, MN.

Debbie Reznick, Senior Program Officer, Polk Bros. Foundation

Debbie Reznick's work supports the Foundation's Strong Communities program, which has five focus areas that are designed to promote safe and thriving neighborhoods with quality jobs, housing, legal services, and economic activity. Debbie leads the Foundation's grant making strategies to prevent and end homelessness, provide equitable access to legal services and strengthen the capacity of the organizations and sectors in which the Foundation's nonprofit partners operate. Debbie serves on a number of nonprofit boards, including Funders Together to End Homelessness and Albany Park Theater Project, which is a multiethnic, youth ensemble that devises original plays that challenge inequality and racism and humanize complex issues like immigration, foreclosure, and hunger. Prior to joining Polk Bros. Foundation, Debbie worked with the New Israel Fund to advance democracy and equality for all Israelis. She was an American Jewish World Service 2014 Global Justice Fellow.

Jaclyn Piñero, Director of Development, Bay Area Legal Aid

Jaclyn Piñero provides leadership and direction in all individual giving and grant/contract procurement and management for offices across a seven-county service region of the San Francisco Bay Area. Over Jaclyn's 13-year tenure at BayLegal she has grown BayLegal's grants and contracts portfolio from 32 grants totaling \$5.8 million to a portfolio of 80 grants totaling over \$11 million. Jaclyn and her team secure grants in each of BayLegal's five priority areas of law (family law/dv/immigration; housing; health access; benefits access; consumer advocacy) and for target populations including transitional age youth, reentry populations, immigrants, Veterans, and many others. She also works in close collaboration with BayLegal's Board of Directors to secure approximately \$1 million in individual, law firm, corporate and cy pres support.

Jennifer Bentley, Chief Development Officer, Michigan Advocacy Program

Jennifer Bentley is responsible for grants and fundraising for Michigan Advocacy Program's field offices and statewide programs — with a combined budget of 7.4 million dollars. The Michigan Advocacy Program receives a significant amount of support from local, regional and national foundations for both general legal aid work and statewide advocacy. Jennifer has been with legal aid since graduating from law school in 1997 and has been in development since 2007. In 2011, Jennifer received her Certificate in Fundraising Management from the Center on Philanthropy at Indiana University. She also works closely with the Access to Justice Campaign — a collaborative campaign between the State Bar of Michigan, the Michigan State Bar Foundation and Michigan's civil legal aid programs.

Find and Retain Donors

Thursday, July 21, 2016, 1:45-3:15 pm, Fender 3

How do you find the prospects most likely to give to your organization? How do you connect with and steward your donors? In this session, panelists will provide practical information about the steps involved in this important process and best practices for programs, whether centralized or decentralized, metropolitan or regional. You will gain insight into how to increase revenue from the private bar, both law firms and individual attorneys.

MODERATOR:

Andrea Kaufman, Director, The Fund for Legal Aid, and Development Director, Mid-Minnesota Legal Aid

Andrea Kaufman has been Director of The Fund for Legal Aid and Development Director of Mid-Minnesota Legal Aid since 2011. Prior to joining the staff, she served on the Board of The Fund for Legal Aid for nearly 20 years and was

Chair of the Board from 2008 to 2010. Andrea develops and executes strategies for fundraising to support Legal Aid in 20 counties in central Minnesota. With 70 lawyers, Legal Aid is the 12th largest law firm in the state. The Fund for Legal Aid provides \$1.4 million to Legal Aid annually through the One Hour of Sharing Campaign and the Law Day Testimonial Dinner. Legal Aid does not receive LSC funding.

During Andrea's legal career, she was District General Counsel for Minneapolis Public Schools (2010-2011) and held various management positions in the legal department at U.S. Bank (1992-2009), including Senior Deputy General Counsel. She was in private practice for several years after graduating from the University of Minnesota Law School in 1985.

PRESENTERS:

Cindy Durham, Director of Development, Legal Aid Society of Middle Tennessee and the Cumberland

Cindy Durham became Director of Development for Legal Aid Society of Middle Tennessee and the Cumberland in March 2006. Prior to this, she was Development Director for NAMI Tennessee; Foster Care Review Board Specialist for Sumner County Juvenile Court; and Executive Director for the TN Association for the Education of Young Children. In 1991 Cindy founded Sumner County CASA, where she served as Executive Director until 2000. Previously she was a loan closing agent and corporate/real estate paralegal.

Cindy has served on numerous boards and task forces since graduating from Vanderbilt University in 1981. She served as Chair of the Tennessee Commission on Children and Youth from 2003–2012, the longest serving chair in the agency's history. She was the Treasurer/Secretary and a member of the Executive Board of the Coalition for Juvenile Justice from 2005–2010. She served on CJJ's Finance Committee from 2005–2011 and on its Membership Committee from 2010–2012. Cindy was a member of the Federal Advisory Committee on Juvenile Justice from 2003–2009. Cindy is currently a member of and Program Chair for the Breakfast Club of Nashville. She resides in Nashville and has 3 adult children.

Lisa Verges, Director of Development, Community Legal Services

Lisa Verges joined Community Legal Services as Director of Development in 2012. She entered the nonprofit fundraising world as a college student over 30 years ago, found inspiration, and never left. A graduate of the University of Virginia, Lisa has focused her work on individual giving and Board governance at legal services, health care, and youth development organizations, mostly in the Philadelphia area. She has served in staff, consulting, and volunteer roles, and believes that professionals openly sharing their experiences and questions leads to greater understanding and success. An active rower, Lisa is a founding Board member and volunteer serv-

ing the Head of the Schuylkill Regatta, Philadelphia's largest and most inclusive rowing event.

Major Gifts Bootcamp

Thursday, July 21, 2016, 1:45–3:15 pm, Fender 1 & 2

Roll up your sleeves and get ready to dig in to the essentials of major gifts fundraising. This interactive discussion will focus on topics central to closing major gifts — strategy, communication, case for support, volunteer involvement and advocacy, and stewardship. Donor motivation, recognition, and long-term engagement will also be examined. We all know that individual giving is up to 80% of the philanthropic giving pie; it's time to get your slice.

PRESENTERS:

Melissa Berliner, Vice President, Campbell & Company

Melissa Berliner has the proven ability to quickly identify the core challenges facing clients and develop tailored, innovative strategies to address them. With the skill to effectively collaborate with individuals who have a variety of personalities and skill levels, Melissa builds consensus among organizational leadership, staff and volunteers to develop and execute carefully developed plans. In her client work, Melissa most values opportunities to:

- Help clients develop successful major gift strategies to secure the high-level support to achieve their goals
- Develop tailored systems and/or processes to help clients work more efficiently in areas ranging from maximizing return on investment to managing donor relationships
- Interview donors and/or volunteers to determine their values, motivations for supporting an organization and philanthropic needs
- Create effective partnerships between Board members and staff
- Strengthen and sustain Board effectiveness

Melissa's work with Campbell & Company includes significant engagements with the Zoological Society of San Diego, Urban Community School, Planned Parenthood Federation and Chicago Shakespeare Theatre. Melissa is also a seasoned guest speaker and lecturer on a variety of fundraising topics, and has spoken at AFP Chicago, Women in Development, DePaul University and Columbia College.

Prior to coming to Campbell & Company, Melissa managed multi-million dollar fundraising programs at the Columbia Art Museum, Victory Gardens Theatre and Stepwolf Theatre. She graduated from Ohio State University with a Bachelor's Degree in English and serves on the Board of the Association of Fundraising Professionals Chicago chapter and is Senior Vice President of Education.

Caitlin Bristow, Associate Consultant, Campbell & Company

Caitlin Bristow brings a unique combination of development experience and a legal training and education to Campbell & Company. During her time in law school, she crafted her education to complement her passion for the nonprofit and higher education sectors. Caitlin developed excellent client counseling and research and writing skills which have translated seamlessly to her work with clients at Campbell & Company. Caitlin graduated from Saint Louis University Law School where she studied Non-profit and Education Law as well as Estate Planning and Trusts and Estates. She also completed a self-proposed seminar project entitled “Planned Giving: Donor’s Intent” where she closely examined the legal implications of planned gifts on major universities. Caitlin also spearheaded student retention and young alumni projects within the Community Relations office at Saint Louis University and worked at the Cardinal Glennon Children’s Hospital in St. Louis where she gained valuable fundraising experience. She graduated from the College of the Holy Cross, where she studied Political Science and Peace and Conflict Studies and worked closely with the Board of Trustees while representing the college in the community as the Director of Community Relations. Caitlin remains active in the Chicago College of the Holy Cross Alumni Association.

Not Your Parents’ Wallet: A Three-Step Plan to Reach Today’s Donors

Thursday, July 21, 2016, 1:45–3:15 pm, Byrdland

The wallet held by today’s donor only slightly resembles that of their parents. By monitoring how donors are responding to our appeals, we can understand better how to raise money, motivate decisions and increase loyalty. As our development programs grow, it is critical that we see and connect with America of 2016 and not 1990. For example, what specifically motivates the LGBT donor community? The Hispanic donor community? Women? Generation Z?

Is your development program ready to embrace this new era of giving? Our three-step plan will help you do just that by: 1) evaluating and assessing your fundraising initiatives and donor communications, 2) gaining buy-in from your board and volunteers, and 3) developing new goals, clear timelines, measuring and celebrating your progress. Join us to explore the “new wallet” concept.

PRESENTER:

Jenny Goldberg, CFRE, Vice President, Aly Sterling Philanthropy

Jenny Goldberg, CFRE, Vice President, Aly Sterling Philanthropy, is an experienced fundraiser, talented speaker and respected advisor. With more than 10 years of experience working and volunteering in the nonprofit sector and a di-

verse background in development and media/public relations, Jenny is focused on helping her clients improve fundraising strategies, donor relations, gift cultivation and overall team effectiveness.

Jenny has presented on fundraising topics at meetings of the Boys & Girls Clubs of America, The Center for Non-profit Resources in Toledo and Nonprofit Enterprise at Work Inc. (NEW) in Ann Arbor and Detroit. Jenny is a graduate of Leadership Toledo and holds a bachelor’s degree from the University of Toledo. She has received training from the Fund Raising School at the Indiana University Lilly Family School of Philanthropy and has served on a many boards and committees with local organizations including the Sight Center of Northwest Ohio, the Anthony Wayne Youth Foundation, the Northwest Ohio Scholarship Fund, the Arts Commission of Greater Toledo, Ronald McDonald House and The Cullen Center at Toledo Children’s Hospital.

How to Most Effectively Engage the Corporate Sector

Thursday, July 21, 2016, 3:30–5:00 pm, Fender 1 & 2

When goals align, corporations can be great partners on legal aid projects. Learn what you need to know to identify corporations that may be appropriate funding sources for your program, how to make an effective pitch and for what, how to work with corporations to maintain relationships, and how corporate support can be powerful beyond the dollars raised.

MODERATOR:

Bob Glaves, Executive Director, Chicago Bar Foundation

Bob Glaves has been Executive Director of The Chicago Bar Foundation since October, 1999. He is responsible for leading and overseeing the CBF’s work to mobilize the legal community around the issue of making the justice system fair and accessible for all. Since Bob became Executive Director, the CBF has increased the amount of its annual grants and fundraising more than tenfold and has played a lead role in launching a number of groundbreaking access to justice initiatives. He has served as the Chair of the Board of Directors for the Donors Forum and President of the National Conference of Bar Foundations, served on other nonprofit boards, and continues to be actively involved in a number of other nonprofit and bar initiatives.

PRESENTERS:

Steven Fus, Assistant General Counsel for International, Environmental, Health, & Safety, United Airlines, Inc.

Steven Fus, an Assistant General Counsel at United Airlines, Inc., is the founding chair of United’s Legal Department pro bono and community service program. Steve serves on the governing boards of Cabrini Green Legal Aid and the Chicago Bar Foundation and is the 2012 recipient of the Chicago

Bar Association and Chicago Bar Foundation's Exelon Outstanding Corporate Counsel Award. Steve is a regular participant in several of United's pro bono programs and is always looking for ways to get more individuals involved, expand the program and provide meaningful access to justice in our communities.

Traci Braun, Associate General Counsel, Exelon Corporation

Traci Braun is Associate General Counsel with Exelon Corporation, specializing in commercial litigation. Traci co-chairs the Pro Bono Committee at Exelon and is an active leader in the company's acclaimed pro bono and community service work. Traci serves on the boards of Cabrini Green Legal Aid and the Public Interest Law Initiative and is one of the leaders in the Chicago Bar Foundation Corporate Leadership Circle. Prior to joining Exelon in 2008, Traci was a partner in Jenner & Block LLP, in Chicago.

Mary Meg McCarthy, Executive Director, National Immigrant Justice Center

Mary Meg McCarthy is the executive director of Heartland Alliance's National Immigrant Justice Center (NIJC). Under Mary Meg's leadership, NIJC has become a leading immigrant and human rights advocacy organization, contributing to national and international analysis, debate and reform of immigration law, policy, and practices. She has built a network of 1,500 pro bono attorneys who are essential to providing legal services to thousands of individuals each year. An expert in immigration law, Mary Meg has testified before Congress and is quoted often in major news outlets such as MSNBC, *The New York Times*, and the *Chicago Tribune*. Prior to joining NIJC, she practiced civil litigation and was an NIJC pro bono attorney. Earlier in her career she worked in local communities in Chile to help safeguard the rights of individuals under a dictatorship.

Develop Strategies for Annual Giving

Thursday, July 21, 2016, 3:30 - 5:00 pm, Byrdland

For many of us, an annual giving campaign is the "bread and butter" of fundraising for legal aid programs. In this session, you will learn to develop a holistic plan that is donor-centric and focuses on motivating repeat and increased annual giving. The end result will be an annual fundraising plan that is measurable, repeatable and successful. Panel members will discuss the "how-tos" of key topics that include:

- Setting monetary goals
- Determining recognition levels
- Reaching lapsed donors and prospective donors
- Using the best mix of direct mail, email, text, other online appeals and events

This will be a conversational session — panel members will ask each other questions. We will discuss our strategies

for annual giving and provide specific examples of what has (and has not) worked.

PRESENTERS:

Cynthia A. Cole, Director of Development and Communications, Legal Aid Society of Greater Cincinnati

Cynthia A. Cole is Director of Development and Communications for the Legal Aid Society of Greater Cincinnati. In her role, she is responsible for generating funding and managing communications for both Legal Aid and the Volunteer Lawyers for the Poor Foundation. Since joining Legal Aid in 2013, she's been involved in a successful \$1 million major gift campaign, the expansion of private fundraising efforts and the creation of a new website. Cynthia has over 25 years of strategic marketing, management, development and communications experience in the non-profit and financial services sectors. She's created successful marketing plans and multimedia strategic brand campaigns that consistently met objectives.

Cynthia received her BA from Kenyon College and her MBA in marketing from the Columbia University Graduate School of Business. She also holds a Six Sigma green belt certification. Active in the community, she serves on the Education and National Philanthropy Day committees of the AFP Cincinnati Chapter. She is also chairman of the national marketing committee for The National Society of The Colonial Dames of America (NSCDA).

Andrea J. Kaufman, Director, The Fund For Legal Aid, and Director Of Development, Mid-Minnesota Legal Aid

Andrea Kaufman has been Director of The Fund for Legal Aid and Development Director of Mid-Minnesota Legal Aid since 2011. Prior to joining the staff, she served on the Board of The Fund for Legal Aid for nearly 20 years and was Chair of the Board from 2008 to 2010. Andrea develops and executes strategies for fundraising to support Legal Aid in 20 counties in central Minnesota. With 70 lawyers, Legal Aid is the 12th largest law firm in the state. The Fund for Legal Aid provides \$1.4 million to Legal Aid annually through the One Hour of Sharing Campaign and the Law Day Testimonial Dinner.

During Andrea's legal career, she was District General Counsel for Minneapolis Public Schools (2010-2011) and held various management positions in the legal department at U.S. Bank (1992-2009), including Senior Deputy General Counsel. She was in private practice for several years after graduating from the University of Minnesota Law School in 1985.

Mobilizing Your Board to Use Their Strengths and Grow Your Mission

Thursday, July 21, 2016, 3:30-5:00 pm, Les Paul

For this panel discussion, a development leader and board member pair from three different organizations will share strategies to motivate and mobilize your board. You'll walk

away with concrete tools to engage individual board members in fundraising endeavors, set your collaborations up for success, and recruit future board leaders that advance your mission.

MODERATOR:

Erin Lunde Keenan, Development and Communications Director, Northwest Immigrant Rights Project

Erin Lunde Keenan is the Development and Communications Director at Northwest Immigrant Rights Project (NWIRP) in Seattle, Washington, a statewide nonprofit which defends and advances the rights of immigrants through direct legal representation and systemic advocacy. Prior to joining NWIRP in 2013, Erin led communications and fundraising efforts in Eastern Washington, focusing on issues such as English as a Second Language, immigrant rights, Fair Trade, and affordable housing. Erin earned a bachelor's degree in English from Luther College in Iowa and grew up in North Dakota. When she's not doing donor visits or fundraising meetings, Erin spends her time hiking, climbing, and skiing in the mountains.

PRESENTERS:

David Collins, Board Member and Chair of Development Committee, Prairie State Legal Services

Dave Collins has been with Quinn, Johnston, Henderson, Pretorius & Cerulo law firm in Peoria, Illinois, for nearly 25 years. His practice is concentrated in the defense of cases involving personal injury and wrongful death and representing the interests of employers in employment-related matters. He has served as a pro bono attorney in many cases over his career and currently serves as the firm's liaison for pro bono matters. He has served on Prairie State Legal Services' Board of Directors since early 2012 and has served as Chairman of the Development Committee since early 2014.

Michael O'Connor, Executive Director, Prairie State Legal Services

Michael O'Connor is the Executive Director of Prairie State Legal Services, now in his 11th year in this position. Prairie State is the LSC funded program serving northern Illinois; this includes the suburban region surrounding Chicago, several small cities, and a large rural area. Prairie State has had success in conducting annual fundraising campaigns in all parts of its service area, and is now in the midst of efforts to expand its development team in order to commit great resources to securing major gifts.

Gretchen Slusser, former Executive Director, Cabrini Green Legal Aid

Gretchen is the President of thredpartners, a Chicago-based management consulting firm she co-founded in 2004. Her desire to affect real change in the community and to provide opportunities for the people of Chicago is what drives her today. After leaving CGLA, where she served as ED, she decided

to use her experience as a management consultant coupled with her learning and success as an Executive Director to launch a program under thredpartners called Move.Me(nt). Move.Me(nt) works with nonprofits and foundations in the areas of outcomes and metrics, collaborative service models and nonprofit leadership all geared towards creating more efficient and effective organizations.

Venu Gupta, Vice President of Development, Sargent Shriver National Center on Poverty Law

Venu Gupta, Vice President of Development, provides strategic direction and oversight to the Shriver Center's fundraising and outreach efforts, including individual and major giving, corporate and foundation relations, and events. She has 15 years' experience in the legal and nonprofit arenas, including seven years as executive director of the Chicago Committee on Minorities in Large Law Firms, where she expanded funding, programming, and outreach to the legal community. She is also an active volunteer for social justice causes; she co-founded the South Asian Philanthropy Project and is a board member of Business and Professional People for the Public Interest. Venu is a graduate of both Harvard Law School and Northwestern University's Kellogg School of Management.

Debbie Chizewer, Chair, Board of Directors, Sargent Shriver National Center on Poverty Law

Identifying and Addressing Implicit Biases in Fundraising

Thursday, July 21, 2016, 3:30–5:00 pm, Fender 3

Join us for an interactive workshop that looks at the issues of implicit biases that may affect our fundraising, leadership development and promotion of our mission of civil legal aid for everyone. Nationally, grantors are self-reflecting on these issues and we need to as well. Our session will include a one-on-one conversation with Martha Bergmark, a legal aid pioneer, who can speak to overcoming many odds nationally and locally to fund and bring civil justice to our communities. We will equip you with tools to assess where your fundraising shop can improve and create a more dynamic pipeline for change and funding.

PRESENTERS:

Martha Bergmark, Executive Director, Voices for Civil Justice

Martha Bergmark is the founding executive director of Voices for Civil Justice. Over three decades, she has founded and/or led several initiatives for equal justice under law, both at the national level in Washington, DC and in Mississippi, where she grew up. In 2003, Martha was named the Stern Family Fund's Public Interest Pioneer. This honor came with a \$200,000 grant to launch the Mississippi Center for Jus-

tice (MCJ), which she led until 2013. She and her colleague started MCJ sharing a single desk in a spare room at a law office. A decade later, the Center has a \$4.3 million annual operating budget and a staff of 35. She still serves as a board member and senior counsel.

Before that, Martha spent 15 years as an advocate for equal justice under the law in Washington, DC. She served tenures as president and executive vice president of the Legal Services Corporation, which administers federal funding for legal aid programs. She was also senior vice president for programs at the National Legal Aid & Defender Association, where she directed the Project for the Future of Equal Justice (a joint initiative with the Center for Law and Social Policy). Martha began her legal career practicing civil rights and poverty law for 14 years in Hattiesburg, Mississippi. There she was the founding executive director of Southeast Mississippi Legal Services (now Mississippi Center for Legal Services).

Delia Coleman, Vice President of Strategy and Policy, Forefront

Forefront is building a vibrant social impact sector for all the people in Illinois. Forefront provides education, advocacy, thought-leadership, and project management, working closely with its members and collaborating with government, business, social enterprises, and other allies.

Delia Coleman guides and directs the Strategic Initiatives at Forefront, as well as educates policymakers at all levels of government on key issues impacting grant makers and social impact organizations. She joined Forefront in 2010 as Manager, Public Policy Communications and Outreach, received several promotions, and assumed her current role in February 2016. Previously, Delia was Government Relations Officer at YWCA Metropolitan Chicago. She has been a Board Member of Chicago Lights and an Advocacy Council member of Women Employed. She is currently Board Co-Chair of the Chicago Abortion Fund. Before entering the nonprofit sector, she worked for several years in the corporate world, including at Gagen MacDonald (formerly Matha MacDonald), Starpoint Solutions, and Deloitte Consulting.

Debra Walker-Johnson, Director of Development, Chicago Lawyers Committee for Civil Rights Under Law

Debra Walker-Johnson is Director of Development for CLC. She has more than 20 years of experience in marketing, communications, coalition building and nonprofit fundraising and management. Over the course of her career, she has successfully designed and implemented programs to serve disenfranchised individuals, as well as secured funding to support them. Most recently, she served as the Vice President of Marketing and Development for National Able Network, Inc., where she was responsible for the development and growth of the organization's private and public sector fundraising programs and all marketing, media relations and advocacy efforts. She has also served as Executive Director of CTCNet Chicago, the Director of Community Initiatives for Women

Employed, and the Director of the Employment Training Program for Southwest Women Working Together.

Debra is currently a member of the Chicago Jobs Council Board and is the past president of Illinois Women Work! She has also been a member of the City of Chicago's Community Development Advisory Committee and the Economic Development subcommittee, the Governor's Commission on the Status of Women in Illinois, the Statewide Non-traditional Leadership Team, Daley College's Advisory Board, the Beverly Area Planning Association's Public Education Committee, and Leadership Illinois.

Tanya Pietrkowski, Director of Development, CARPLS Legal Aid

Tanya Pietrkowski is Director of Development at CARPLS Legal Aid in Chicago. She has more than 20 years of fundraising experience at a variety of organizations with the last 12 years spent in the legal arena.

Dinner

Thursday, July 21, 2016, 6:00 pm, hotel bar

Dinner on your own or sign up for one of the "dinner groups" that will have been announced and organized at the Thursday morning plenary. Informal gathering for drinks in the hotel bar.

Continental Breakfast

Friday, July 22, 2016, 7:30–9:00 am, Fender Prefunction

Thirty Minutes with a Mentor

Friday, July 22, 2016, 8:00–8:45 am, Fender Prefunction

[Note: To participate in this opportunity, you must have registered for the conference by June 30 and requested a mentor. By the time you are reading this, you will have already received the name and contact information for your mentor/mentee.]

StoryCorps

Friday, July 22, 2016, 9:00–10:30 am, Fender 1 & 2

[Note: This workshop is limited to 30 participants. An opportunity for advance sign-up was offered and the session is full.]

Participants will learn best practices for active listening and storytelling. Specific methods are provided for asking great questions and how to structure a well-made story. Additionally, participants will be able to learn about StoryCorps' process for recording oral histories and further information about how to use the StoryCorps app. The workshop will also function as a brainstorming session for how participants will be able to take StoryCorps' model back to their own organizations.

PRESENTER:

Francesco De Salvatore is a Chicago-based educator, oral historian, and documentarian. His work is focused on challenging and transforming historical narratives by compiling the collective knowledge of communities and centering the voices of those most marginalized in our society. In the past he has worked with young people all across the city of Chicago as a popular education facilitator for Chicago Freedom School and as a teaching artist at Free Street Theatre. Additionally, as a radio producer, he has had work featured on WBEZ, Vocalo, and WFMT.

Currently, Francesco works as the Community Engagement Associate at StoryCorps in Chicago. He is responsible for collecting, editing, and archiving oral histories in the Chicago-land area. At the moment he is also compiling a book of oral histories about the city of Gary, Indiana. Francesco studied Dramaturgy/Criticism at DePaul University. He is currently pursuing a Master of Arts in Teaching History.

About StoryCorps:

StoryCorps is an independent nonprofit organization whose mission is to provide people of all backgrounds and beliefs with the opportunity to record, share, and preserve the stories of our lives. We do this to remind one another of our shared humanity, strengthen and build the connections between people, teach the value of listening, and weave into the fabric of our culture the understanding that every life matters. At the same time, we will create an invaluable archive of American voices and wisdom for future generations. Since 2003, more than 100,000 everyday people have interviewed family and friends through StoryCorps, making it one of the largest oral history projects of its kind. Listen to the StoryCorps Chicago Series every Friday during All Things Considered on WBEZ 91.5FM.

Telling Our Story and Inspiring Audiences

Friday, July 22, 2016, 9:00–10:30 am, Byrdland

As fundraising professionals, we often find ourselves translating “legal-eze” into formats that donors can easily understand, quickly relate to and find inspiring enough to make a gift. We also understand the importance of creating a variety of materials (newsletters, annual reports, grants) that tell the story in between — or in support of — the asks we make. We hear that we need to make our materials “donor centered” but what does that mean? Learn tips from others about how to tease out the story best suited for the audience you are trying to reach.

MODERATOR:

Jennifer K. Pelton, CFRE, Director of Development, Public Justice Center

Jennifer K. Pelton is a veteran fundraiser and nonprofit manager with almost 25 years of experience. Jennifer’s career has

spanned arts management and social justice causes. She is currently the Director of Development for the Public Justice Center in Maryland. She has held this position since 2003 and steadily has grown the dollars raised, donors engaged and humans included in the process of raising funds. Prior to PJC, Jennifer was the Executive Director of the Baltimore Chamber Orchestra. She also worked with the Baltimore Chesapeake Bay Outward Bound program, the House of Ruth and Safe Against Violence.

Jennifer has held the distinguished international credential of Certified Fund Raising Executive since 2006 and graduated from the AFP Faculty Training Academy in 2010. She is an officer of the AFP-Maryland Chapter Board of Directors. Also a consultant, Jennifer focuses her practice on supporting small shop practitioners and nurturing effective boards. She has published articles in the *Grassroots Fundraising Journal* including one about the importance of creating a healthy organizational culture to retain fundraising staff. She graduated from Wells College cum laude in 1992 and lives in Baltimore with her interesting kids.

PRESENTERS:

Cynthia A. Cole, Director of Development and Communications, Legal Aid Society of Greater Cincinnati

Cynthia A. Cole is Director of Development and Communications for the Legal Aid Society of Greater Cincinnati. In her role, she is responsible for generating funding and managing communications for both Legal Aid and the Volunteer Lawyers for the Poor Foundation. Since joining Legal Aid in 2013, she’s been involved in a successful \$1 million major gift campaign, the expansion of private fundraising efforts and the creation of a new website. She has over 25 years of strategic marketing, management, development and communications experience in the non-profit and financial services sectors. She’s created successful marketing plans and multimedia strategic brand campaigns that consistently met objectives.

Cynthia received her BA from Kenyon College and her MBA in marketing from the Columbia University Graduate School of Business. She also holds a Six Sigma green belt certification. Active in the community, she serves on the Education and National Philanthropy Day committees of the AFP Cincinnati Chapter. She is also chairman of the national marketing committee for The National Society of The Colonial Dames of America (NSCDA).

Linda Kim, Director of External Affairs and Pro Bono, Bay Area Legal Aid

Linda joined Bay Area Legal Aid (BayLegal) in 2015 as the Director of External Affairs and Pro Bono. She works closely with law firms to expand social justice opportunities for colleagues in the private sector. Linda is also developing BayLegal’s communications strategy and engaging a broad cross-section of partners in the dialogue to end poverty and spread the word that #CivilLegalAid makes a difference to the

health and future of the Bay Area.

Linda serves on the National Legal Aid & Defender Association's (NLADA) Civil Policy Committee and the University of San Francisco School of Law's Board of Governors. She has served on the Board for Southeast Asia Resource Action Center and is a graduate of the OneJustice Executive Fellowship Program for Nonprofit Management. She has clerked with the State Bar of California Office of Chief Trial Counsel, mediated in Small Claims Division of San Francisco County Superior Court, and lobbied at the U.N. Commission on the Status of Women. Linda's international work includes developing legal advocacy projects in Cambodia and Indonesia, and working as a translator in Costa Rica with the Central American Human Rights Commission. Before law school, she worked in outdoor apparel manufacturing and technology sectors. Prior to BayLegal, Linda was the Deputy Director of OneJustice.

Fatigue, and Burnout, and Roadblocks, Oh My!

Friday, July 22, 2016, 9:00–10:30 am, Fender 3

What development professional hasn't experienced one, (or the whole host!), of these ferocious creatures in the course of their work? In this interactive workshop, we will discuss how to overcome common roadblocks to achieving personal and organizational development goals and how to bust through plateaus. Come with your formidable list of challenges and we will tackle the beasts - even if that beastie may be looking at you in the mirror! We will begin with a large group discovery session, examine our top three common barriers, and close with small peer support groups, to delve deeper into specific success barriers and address outliers.

PRESENTERS:

David Gee, Associate Vice President, HUB Philanthropic Solutions

David Gee is an Associate Vice President with HUB Philanthropic Solutions. David is passionate about connecting folks with opportunities to help make a difference in people's lives and working in partnership with others to strengthen our community. Engaged in the social impact sector for the past 11 years, David is an experienced development professional with particular expertise in capital campaigns, major gifts and donor stewardship. He joined the team at HUB Philanthropic Solutions (HPS) in the summer of 2013 and recently completed successful capital campaigns for Old St. Patrick's Church and Marillac St. Vincent Family Services. In addition to capital campaigns clients, David has been providing strategic counsel for major gift initiatives, donor stewardship, board development and strategic planning. Prior to joining HPS, David served for over 7 years at The Chicago Bar Foundation (CBF). As their first full-time Director of Development, he

worked on increasing revenue streams to support the Foundation's mission, while fostering and strengthening donor relationships and helping to expand the community's awareness of the CBF's efforts in the community. Before starting his second career in philanthropy, David put his BFA from Illinois Wesleyan University to use, enjoying 18 successful years as a professional actor in Chicago. A member of the Association of Fundraising Professionals (AFP), David currently serves on Forefront's Resource Development Committee and the Development Committee for All Chicago. David lives with his wife on Chicago's northwest side and is the proud father of their two boys.

Amy Sings In The Timber, Director of Donor Relations, Chicago Bar Foundation

Amy Sings In The Timber is the Director of Donor Relations for the Chicago Bar Foundation (CBF). In this role, Amy creates and executes the CBF's organizational fundraising strategy, including individual, law firm and corporate giving, the Investing in Justice Campaign, special events, and planned and major gifts, as well as managing the CBF's development team. Prior to joining the CBF, Amy was the Executive Director of the Montana Justice Foundation, Montana's Interest on Lawyer Trust Accounts Program (IOLTA) and state bar foundation. In that role, she was responsible for leading and overseeing the foundation's work to increase access to justice for all Montanans. During her tenure, Amy designed and implemented successful IOLTA and private development campaigns, generating unprecedented legal aid program resources. Amy earned her law degree from the University of Montana School of Law, and attended the University of Wisconsin-Milwaukee and the University of Wisconsin for her undergraduate and graduate studies respectively. She has presented at conferences on a number of topics, including cy pres, access to justice, resource development for civil legal aid, and social/racial justice. Amy lives on Chicago's northwest side with her husband and two young children and spends her down time hiking, horseback riding and eating pastry.

BIG, Short-term, Restricted Funding — Getting and Managing

Friday, July 22, 2016, 9:00–10:30 am, Les Paul

Bank of America/Chase/Citi/National Mortgage Settlements — These awards have been large, short-term and restricted in use. Some of the funds have been available to legal aid programs in every state (often through IOLTA); with other funds, legal aid programs in only a few states have been able to access. There may be more like them in the future. In this session, we will analyze these awards and others like them — What do programs need to know about those still to be disbursed, what can programs do to help generate similar funds for legal aid in the future, how do you most effectively apply

for these grants, and how do you manage them once they've been received. Come prepared to share your experiences and ask questions.

MODERATOR:

Meredith McBurney, Resource Development Consultant, MIE

Meredith McBurney has spent over 35 years working with and for legal aid and access to justice organizations as a staff person, consultant and volunteer, specializing in resource development. In her current role as resource development consultant to MIE, she works on the design and implementation of MIE's resource development activities, as well as providing in-depth consulting to individual programs. She also works with the ABA Resource Center for Access to Justice Initiatives, researching and analyzing fundraising trends and practices within legal services nationwide, and using the information she gains to provide information, training and technical assistance to bench, bar and legal aid leaders throughout the country. From 1981 to 1997, she served as the executive director for Colorado's IOLTA program and the Legal Aid Foundation, Colorado's statewide fundraising organization. Before that, she was the administrator for Colorado Rural Legal Services.

PRESENTERS:

Bev Groudine, Staff Counsel, Commission on IOLTA, American Bar Association

Bev Groudine has been a staff member of the American Bar Association for many years, working on a wide range of issues regarding access to justice including: Interest on Lawyers' Trust Accounts (IOLTA) and other funding initiatives for legal aid; delivery of high quality civil legal services to persons living in poverty; and pro bono policy development. She currently serves as chief counsel to the ABA Commission on Interest on Lawyers Trust Accounts (IOLTA) and associate counsel to the ABA Standing Committee on Legal Aid and Indigent Defendants. Bev began her legal career at the Legal Assistance Foundation of Chicago, where she was a staff attorney for six years and a supervisory attorney for three years.

Jon Laramore, Executive Director, Indiana Legal Services

StoryCorps

(session repeat, see further information above)

Friday, July 22, 2016, 10:45–12:15 pm, Fender 1 & 2

[Note: This workshop is limited to 30 participants. An opportunity for advance sign-up was offered and the session is full.]

Participants will learn best practices for active listening, and storytelling. Specific methods are provided for asking great questions and how to structure a well-made story. Additionally, participants will be able to learn about StoryCorps' process for recording oral histories and further information about how

to use the StoryCorps app. The workshop will also function as a brainstorming session for how participants will be able to take StoryCorps' model back to their own organizations.

"Have to Ask to Receive:" Sharpen Your Skills in Making the Ask

Friday, July 22, 2016, 10:45 am–12:15 pm, Byrdland

"99 percent of fundraising is not asking but cultivating." "You have to ask to receive." "Donors are not ATMs." We hear these maxims and we know that it is our role to ask for funds to support our mission. We support our boards and executives in their pursuit of contributions. Yet how often do we pause to hone or practice our skills at asking for a gift? In this fun, fast-paced and interactive workshop, we will create a safe space to practice among peers.

PRESENTER:

Jennifer K. Pelton, CFRE, Director of Development, Public Justice Center

Jennifer K. Pelton, CFRE is a veteran fundraiser and nonprofit manager with almost 25 years of experience. Jennifer's career has included spanned arts management and social justice causes. She is currently the Director of Development for the Public Justice Center in Maryland. She has held this position since 2003 and steadily has grown the dollars raised, donors engaged and humans included in the process of raising funds. Prior to PJC, Jennifer was the Executive Director of the Baltimore Chamber Orchestra. She also worked with the Baltimore Chesapeake Bay Outward Bound program, the House of Ruth and Safe Against Violence. Jennifer has held the distinguished international credential of Certified Fund Raising Executive since 2006 and graduated from the AFP Faculty Training Academy in 2010. She is an officer of the AFP-Maryland Chapter Board of Directors. Also a consultant, Jennifer focuses her practice on supporting small shop practitioners and nurturing effective boards. She has published articles in the *Grassroots Fundraising Journal* including one about the importance of creating a healthy organizational culture to retain fundraising staff. She graduated from Wells College cum laude in 1992 and lives in Baltimore with her interesting kids.

Endowments and Reserves

Friday, July 22, 2016, 10:45 am–12:15 pm, Les Paul

What are Endowments? Are they important? Why do some donors resist? What about Cash Reserves? This session will examine and explain both of these fundraising resources — what they are, how they work, and when to start one. We will discuss the situations that might lead up to starting an endowment or reserve, as well as how to use both of these types of funds to increase your fundraising, balancing the needs of your organization with your donor's legacy and intent.

PRESENTER:**Abbe Temkin, Director of Major and Planned Gifts, The Chicago Community Trust**

Abbe Temkin is director of major and planned gifts for The Chicago Community Trust, joining the Trust in 2013. She is responsible for a broad range of matters including charitable contributions, donor advised funds, supporting organizations and agency endowments. She works closely with the Trust's Professional Advisory Committee and Young Professional Advisory Committee to provide resources and expertise to help meet their clients' philanthropic goals. She previously served as director of individual giving for The University of Chicago Medicine and Biological Sciences and the director of development for the American Committee for the Weizmann Institute of Science. She spent many years as a consultant with CCS Fundraising, where she was western regional director for the United States Holocaust Memorial Museum, and served clients including the Jewish Agency for Israel, the International Code Council and the Nature Conservancy of Wisconsin.

Abbe holds a Bachelor of Arts degree in English from Western Michigan University and a JD from The John Marshall School of Law. She was a practicing trial attorney for 12 years before transitioning full time into the field of development. She is a member of the Chicago Estate Planning Council, the Chicago Council for Planned Giving and the Association of Fundraising Professionals, and sits on the board of directors for Chicago Women in Philanthropy, Rebecca's Dream and PersonalPAC. She has served as a volunteer leader in marathon and half-marathon training for the Chicago Area Runners Association since 1999.

Intimate Events – For Cultivation, Fundraising and Stewardship

Friday, July 22, 2016, 10:45 am–12:15 pm, Fender 3

No ticket sales. No big sponsors. No raffle tickets or auction items. No hotel ballroom with rubber chicken. These are smaller, more intimate events where staff leadership, board members, prospects and donors have an opportunity to share, engage with each other, and deepen their understanding of and commitment to the cause and the organization. In this interactive session, the facilitators will provide an overview of three types of small events, aimed at cultivation, fundraising and stewardship. Participants will have an opportunity to begin planning their first (or next) intimate event, and then receive feedback from others in the audience.

PRESENTERS:**Erin Lunde Keenan, Development and Communications Director, Northwest Immigrant Rights Project**

Erin Lunde Keenan is the Development and Communications Director at Northwest Immigrant Rights Project (NWIRP) in Seattle, Washington, a statewide nonprofit which

defends and advances the rights of immigrants through direct legal representation and systemic advocacy.

Prior to joining NWIRP in 2013, Erin led communications and fundraising efforts in Eastern Washington, focusing on issues such as English as a Second Language, immigrant rights, Fair Trade, and affordable housing. Erin earned a bachelor's degree in English from Luther College in Iowa and grew up in North Dakota. When she's not doing donor visits or fundraising meetings, Erin spends her time hiking, climbing, and skiing in the mountains.

Amy Sings In The Timber, Director of Donor Relations, Chicago Bar Foundation

Amy Sings in the Timber is the Director of Donor Relations for the Chicago Bar Foundation (CBF). In this role, Amy creates and executes the CBF's organizational fundraising strategy, including individual, law firm and corporate giving, the Investing in Justice Campaign, special events, and planned and major gifts, as well as managing the CBF's development team. Prior to joining the CBF, Amy was the Executive Director of the Montana Justice Foundation, Montana's Interest on Lawyer Trust Accounts Program (IOLTA) and state bar foundation. In that role, she was responsible for leading and overseeing the foundation's work to increase access to justice for all Montanans. During her tenure, Amy designed and implemented successful IOLTA and private development campaigns, generating unprecedented legal aid program resources. Amy earned her law degree from the University of Montana School of Law, and attended the University of Wisconsin-Milwaukee and the University of Wisconsin for her undergraduate and graduate studies respectively. She has presented at conferences on a number of topics, including cy pres, access to justice, resource development for civil legal aid, and social/racial justice. Amy lives on Chicago's northwest side with her husband and two young children and spends her down time hiking, horseback riding and eating pastry.

Inspire Giving Through Shifting the Conversation

Friday, July 22, 2016, 1:45–3:15 pm, Fender 1 & 2

What if we talked about the work we do through a lens of strength, not sympathy? What if donors saw the "clients" we serve as the people we are? Come learn how the "I Am Somebody" campaign at Cabrini Green Legal Aid did just that, by sharing glimpses into the lives of people who will inspire you, enlighten you and — and at the same time open hearts and minds to the impact of the criminal justice system. In this workshop, you will learn how to approach your fundraising through this method and expose new supporters to your organization.

PRESENTERS:

Beth Johnson, Director of Legal Programs, Cabrini Green Legal Aid

Beth Johnson joined Cabrini Green Legal Aid (CGLA) in 2005 and currently serves as the Director of Legal Programs, leading a dynamic team dedicated to an interdisciplinary practice, serving the whole person that walks in the door. She has helped CGLA grow to provide legal services to over 7,500 people each year — people impacted by the criminal justice system — through strategic planning, innovative project design and program implementation. Beth also leads the policy and advocacy work of the organization, working alongside those directly impacted by the criminal justice system, to change laws, rules, regulations and perceptions that run contrary to the “justice” within the criminal justice system. She has been acknowledged for her work by the Chicago Community Trust through an Emerging Leader Fellowship, the Clerk of the Circuit Court of Cook County as an Outstanding Woman in Nonprofits and by the Chicago Bar Foundation and DePaul University College of Law through public interest fellowships.

Gretchen Slusser, former Executive Director, Cabrini Green Legal Aid

Gretchen is the President of thredpartners, a Chicago-based management consulting firm she co-founded in 2004. Her desire to affect real change in the community and to provide opportunities for the people of Chicago is what drives her today. After leaving CGLA, where she served as ED, she decided to use her experience as a management consultant coupled with her learning and success as an Executive Director to launch a program under thredpartners called Move.Me(nt). Move.Me(nt) works with nonprofits and foundations in the areas of outcomes and metrics, collaborative service models and nonprofit leadership all geared towards creating more efficient and effective organizations.

In 2015, Gretchen saw her passion project come to life in the unveiling of *I Am Somebody*, an art and video exhibit showcasing the lives of the people CGLA had the privilege to serve over the years. *I Am Somebody* is a call to action for all of us to take hold of our community, choose to nurture our neighbors and inspire others to do the same.

Create a Sizzling Comprehensive Development Plan (Before You Go Home)

Friday, July 22, 2016, 1:45–3:15 pm, Byrdland

You have spent a lot of time absorbing new ideas and best practices from your fundraising peers at this conference. You're feeling inspired and buoyed. Will you remember all of it when you get back to your desk? Come to this final workshop before you go home. You will reflect and chew on where you can insert new ideas or tweak old ones in your own orga-

nization's development plan. The workshop will be a guided facilitation that will also feature peer learning and “in-room mentors” to help.

MODERATOR:

Jennifer K. Pelton, CFRE, Director of Development, Public Justice Center

Jennifer K. Pelton, CFRE, is a veteran fundraiser and non-profit manager with almost 25 years of experience. Jennifer's career has spanned arts management and social justice causes. She is currently the Director of Development for the Public Justice Center in Maryland. She has held this position since 2003 and steadily has grown the dollars raised, donors engaged and humans included in the process of raising funds. Prior to PJC, Jennifer was the Executive Director of the Baltimore Chamber Orchestra. She also worked with the Baltimore Chesapeake Bay Outward Bound program, the House of Ruth and Safe Against Violence. Jennifer has held the distinguished international credential of Certified Fund Raising Executive since 2006 and graduated from the AFP Faculty Training Academy in 2010. She is an officer of the AFP-Maryland Chapter Board of Directors. Also a consultant, Jennifer focuses her practice on supporting small shop practitioners and nurturing effective boards. She has published articles in the *Grassroots Fundraising Journal* including one about the importance of creating a healthy organizational culture to retain fundraising staff. She graduated from Wells College cum laude in 1992 and lives in Baltimore with her interesting kids.

IN ROOM MENTORS:

Cynthia A. Cole, Director of Development and Communications, Legal Aid Society of Greater Cincinnati

Cynthia A. Cole is Director of Development and Communications for the Legal Aid Society of Greater Cincinnati. In her role, she is responsible for generating funding and managing communications for both Legal Aid and the Volunteer Lawyers for the Poor Foundation. Since joining Legal Aid in 2013, she's been involved in a successful \$1 million major gift campaign, the expansion of private fundraising efforts and the creation of a new website. She has over 25 years of strategic marketing, management, development and communications experience in the non-profit and financial services sectors. She's created successful marketing plans and multimedia strategic brand campaigns that consistently met objectives. Cynthia received her BA from Kenyon College and her MBA in marketing from the Columbia University Graduate School of Business. She also holds a Six Sigma green belt certification. Active in the community, she serves on the Education and National Philanthropy Day committees of the AFP Cincinnati Chapter. She is also chairman of the national marketing committee for The National Society of The Colonial Dames of America (NSCDA).

Tami Zavislan, Director of Development, Homeless Persons Representation Project

Tami Zavislan joined HPRP in February 2016, bringing considerable non-profit management and fundraising experience to her position as Director of Development. Prior to her work at HPRP, Tami served as the first Executive Director of the Community Foundation of Harford County in Bel Air, Maryland, growing the organization to more than 40 funds and \$1,000,000 in assets under management. She has directed and managed community-based and national programs in Ohio (Cleveland Music School Settlement), Michigan (Center for Creative Studies — Institute of Music and Dance), Pennsylvania (Kardon Institute), and Maryland (American Music Therapy Association, Ignatian Volunteer Corps, Community Foundation of Harford County).

Tami is a member of the Association of Fundraising Professionals (AFP) and currently serves as president of the AFP Maryland Chapter. She is a member of the Women's Giving Circle of Harford County, and she directs the Children's Choir at her church. Tami graduated from Elizabethtown College (B.S., Music Therapy) and later earned a Masters in Managements in Business Administration from Penn State University.

Donna Marino, Director of Development, The Florida Bar Foundation

Donna Marino currently serves as the statewide Development Director for The Florida Bar Foundation. Her responsibilities include strategic planning and implementation of all of the Foundation's giving programs, including the Fellows program, annual giving, major gifts and planned giving. Her work helps the Foundation provide funding that links 30 legal services programs statewide to form a comprehensive, statewide delivery system.

Donna is experienced in all areas of fundraising, including advisory board management, capital campaigns, major gift solicitation and planned giving. Her enthusiastic, inspired and creative approach contributes to the success of the Foundation's philanthropic objectives. Donna staffs the funding subcommittee for Florida's Commission on Access to Justice. She has served as Central Florida President for the Association of Fundraising Professionals (AFP), board member with the American Association for Women in Community Colleges (AAWCC), advisor to Valencia's inaugural Peace and Justice Initiative Board, and was a member of the Council for Advancement and Support of Education (CASE).

Prior to facilitating access to justice by joining The Florida Bar Foundation in 2014, Donna spent seven years advocating for access to education at Valencia Foundation and earlier served with Valencia College as part of the college and community relations team. In September 2009, Donna was awarded the Certified Fund Raising Executive (CFRE) designation and later obtained her certificate in proposal writing from Rollins College's Edyth Bush Institute for Philanthropy

and Nonprofit Leadership. She has obtained Masters of Business Administration (MBA) and has a bachelors in business management from University of Central Florida (UCF).

Transforming Data into Dollars: Getting the Most Out of Your Organization's Advocacy Work

Friday, July 22, 2016, 1:45–3:15 pm, Les Paul

This session will detail how to translate the results of your organization's legislative and policy advocacy and community organizing work into successful foundation funding proposals. We will overview the efforts employed by legal aid and access to justice programs which are leading in the area of advocacy. Utilizing a case study, we will demonstrate how a successful program effectively moves beyond individual casework metrics to provide funders with the measurable outcomes they are looking for. The session will close with a group discussion to identify concrete next steps your organization can take.

PRESENTERS:

Lynne Johnson, Policy Director, Chicago Alliance Against Sexual Exploitation

Lynne Johnson has been working to end violence against women for over 18 years. As an attorney in Maryland, Lynne represented survivors of domestic violence in Protective Order hearings and also worked in Baltimore City's Juvenile Court system representing children in the foster care system. After moving to Chicago in 1999, Lynne managed domestic violence and rape crisis programs and has advocated for improved community responses to violence against women. Lynne joined Chicago Foundation for Women in 2005 as its program officer, and later served as its director of advocacy, working in areas of reproductive justice and violence against women. In July 2009, Lynne joined Chicago Alliance Against Sexual Exploitation and serves as its policy director, where she leads the End Demand Illinois campaign. Lynne holds a Bachelor of Arts in Political Science from University of Maryland, and a Juris Doctor from University of Baltimore School of Law.

Angela Inzano, Program Manager, Chicago Bar Foundation

Angela Inzano is the Program Manager at the Chicago Bar Foundation (CBF). In that role, in addition to managing the day-to-day operation of the CBF Legal Aid Academy and the CBF Pro Bono Support Program, she works on the CBF's legislative and policy advocacy work. Prior to joining the CBF, Angela was a Staff Attorney and the Policy Project Coordinator at The Family Defense Center (FDC). In that role, she was responsible for coordinating the Center's policy program, parent empowerment program, and a statewide attorney network as well as representing families in DCFS investigations

and administrative appeals. Angela earned her law degree from Loyola University Chicago School of Law, cum laude, and also received her undergraduate degrees in Political Science and English, summa cum laude, from Loyola.

Your Executive Director or Director of Development is Leaving – Are You Prepared? A Panel Discussion from Those Who Have Experienced This Critical Transition

Friday, July 22, 2016, 1:45–3:15 pm, Fender 3

Your beloved Executive Director has given notice she's retiring. You're a Director of Development who is leaving the organization you love. How do you leave the development department in the best possible position? Join a panel of coast-to-coast Development Directors who can share their succession planning experiences and lessons learned. Learn how to make certain the transition is seamless to your donors.

MODERATOR:

Jenny Goldberg, Vice President, Aly Sterling Philanthropy

Jenny Goldberg, CFRE, Vice President, Aly Sterling Philanthropy, is an experienced fundraiser, talented speaker and respected advisor. With more than 10 years of experience working and volunteering in the nonprofit sector and a diverse background in development and media/public relations, Jenny is focused on helping her clients improve fundraising strategies, donor relations, gift cultivation and overall team effectiveness.

Jenny has presented on fundraising topics at meetings of the Boys & Girls Clubs of America, The Center for Non-profit Resources in Toledo and Nonprofit Enterprise at Work Inc. (NEW) in Ann Arbor and Detroit. Jenny is a graduate of Leadership Toledo and holds a bachelor's degree from the University of Toledo. She has received training from the Fund Raising School at the Indiana University Lilly Family School of Philanthropy and has served on a many boards and com-

mittees with local organizations including the Sight Center of Northwest Ohio, the Anthony Wayne Youth Foundation, the Northwest Ohio Scholarship Fund, the Arts Commission of Greater Toledo, Ronald McDonald House and The Cullen Center at Toledo Children's Hospital.

PRESENTERS:

Lisa Verges, Director of Development, Community Legal Services

Lisa Verges joined Community Legal Services in Philadelphia as Director of Development in 2012. She entered the nonprofit fundraising world as a college student over 30 years ago, found inspiration, and never left. A graduate of University of Virginia, Lisa has focused her work on individual giving and Board governance at legal services, health care, and youth development organizations, mostly in the Philadelphia area. She has served in staff, consulting, and volunteer roles, and believes that professionals openly sharing their experiences and questions leads to greater understanding and success. An active rower, Lisa is a founding Board member and volunteer serving the Head of the Schuylkill Regatta, Philadelphia's largest and most inclusive rowing event.

Jaclyn Piñero, Director of Development, Bay Area Legal Aid

Jaclyn Piñero provides leadership and direction in all individual giving and grant/contract procurement and management for offices across a seven-county service region of the San Francisco Bay Area. Over Jaclyn's 13-year tenure at BayLegal she has grown BayLegal's grants and contracts portfolio from 32 grants totaling \$5.8 million to a portfolio of 80 grants totaling over \$11 million. Jaclyn and her team secure grants in each of BayLegal's five priority areas of law (family law/dv/immigration; housing; health access; benefits access; consumer advocacy) and for target populations including transitional age youth, reentry populations, immigrants, Veterans, and many others. She also works in close collaboration with BayLegal's Board of Directors to secure approximately \$1 million in individual, law firm, corporate and cy pres support.