

FOR Nonprofit Center  
Excellence and  
Philanthropy  
AT PENSACOLA STATE COLLEGE

**WORKSHOPS**

April 30

May 15

August 20

September 26

November 21

**ANNUAL SUMMIT**

October 31–November 1

**PENSACOLA STATE COLLEGE** is proud to help strengthen nonprofit and philanthropic organizations through education and management designed to support board governance, enhance the business practices of nonprofit organizations, and expand the influence of the nonprofit sector. Each year the institute will offer certified fundraising executives (CFRE) credit for their mastery of skills and information shared through Pensacola State College's Nonprofit Center for Excellence workshops. In 2019, all scheduled workshops have components designed to increase fundraising acumen. This year, there are five workshops and a two-day summit that can provide CEUs to nonprofit professionals seeking to maintain their CFRE status.

## **WORKSHOP SCHEDULE**

Location: Delaino Student Center  
7:30 a.m. doors open for registration  
Session is 8 a.m. – 4 p.m. with a one-hour break for lunch  
\$75 per registered attendee

### **April 30 – HOW TO CREATE A HIGH FUNCTIONING FUNDRAISING BOARD**

**Michelle Buchanan, Dini Spheris**

- Roles that board and staff play in fundraising
- Fundraising – financial models that fit your nonprofit
- Board member help and support of different fundraising strategies
- Defining expectations for board member engagement in fundraising
- Building common understanding of the prerequisites for successful fundraising

### **May 15 – SUCCESS WITH COMPREHENSIVE CAMPAIGNS**

**Michelle Buchanan, Dini Spheris**

- Overview – definition of a capital & comprehensive campaign
- What donor development looks like and sources of gifts
- Campaign readiness – what is entailed
- Campaign planning essentials
- Campaign management
- Prospect management
- Stewardship

### **August 20 – SURVIVING AND SUSTAINING IN A GRANT SEEKING WORLD**

**Dr. Debbie Douma, Pensacola State College**

- The grantseeking world: what is the environment today?
- Barriers to grantseeking
- Building relationships with funders
- Basic grant considerations
- Determining a fundable project/program idea
- Sustainability using grant funds
- Grant management

### **September 26 – FIRED UP FUNDRAISING: THE ART OF RAISING MAJOR GIFTS**

**Gail Perry, Gail Perry Associates Philanthropy Consultants**

- Determining organizational readiness for major gift fundraising
- Defining your major gift team
- Identifying potential major gift donors
- How to open the door to a donor without being pushy
- Qualifying donors to find out their potential
- The art of a successful donor meeting
- Creating an engagement plan for your donor prospects
- The easy conversational approach to a solicitation
- How your board can help
- How to ask and never get turned down

### **November 21 – DONOR-CENTERED PROPOSALS & PRESENTATIONS**

**Catherine (Cathy) Brown, The Fundraising School – Lilly Family School of Philanthropy**

- Donor centricity: what is it?
- How can you test your communication?
- Can you quantify how donors are vital to your mission's success
- Putting the donor at the center – of communications, stories, and thank-you notes
- Quantifying your organizational effectiveness and efficiency in a way that allows donors own the success
- What research tells us about how donors feel about fundraising
- Components that matter in the fundraising relationship

# COURAGEOUS AND SUSTAINABLE TRANSFORMATION

## NONPROFIT SUMMIT AGENDA

Hosted at the Jean & Paul Amos Performance Studio  
\$250 per registered attendee

### TOPICS COVERED:

Courageous and Transformative Boards  
Partnerships – Cooperative Impact  
Partnership Studies and Best Practices Panel  
Transformational Grants and Infrastructure to Sustain  
Grants Secured through Cooperative Impact  
Donor-Centered Fundraising and Leadership  
Donor-Centered Marketing (Utilizing Storytelling and Results)  
Donor-Centered Leadership for Courageous Transformation  
Marketing for Transformative Change

### SPEAKERS:

**Chuck Loring**, Loring, Sternberg & Associates  
October 31  
**Penelope Burk**, Cygnus Applied Research  
October 31 and November 1  
**Mary Claire Walther**, Dini Spheris  
October 31 and November 1  
**Michelle Buchanan**, Dini Spheris  
November 1  
**Dr. Debbie Douma**, Pensacola State College  
October 31 and November 1

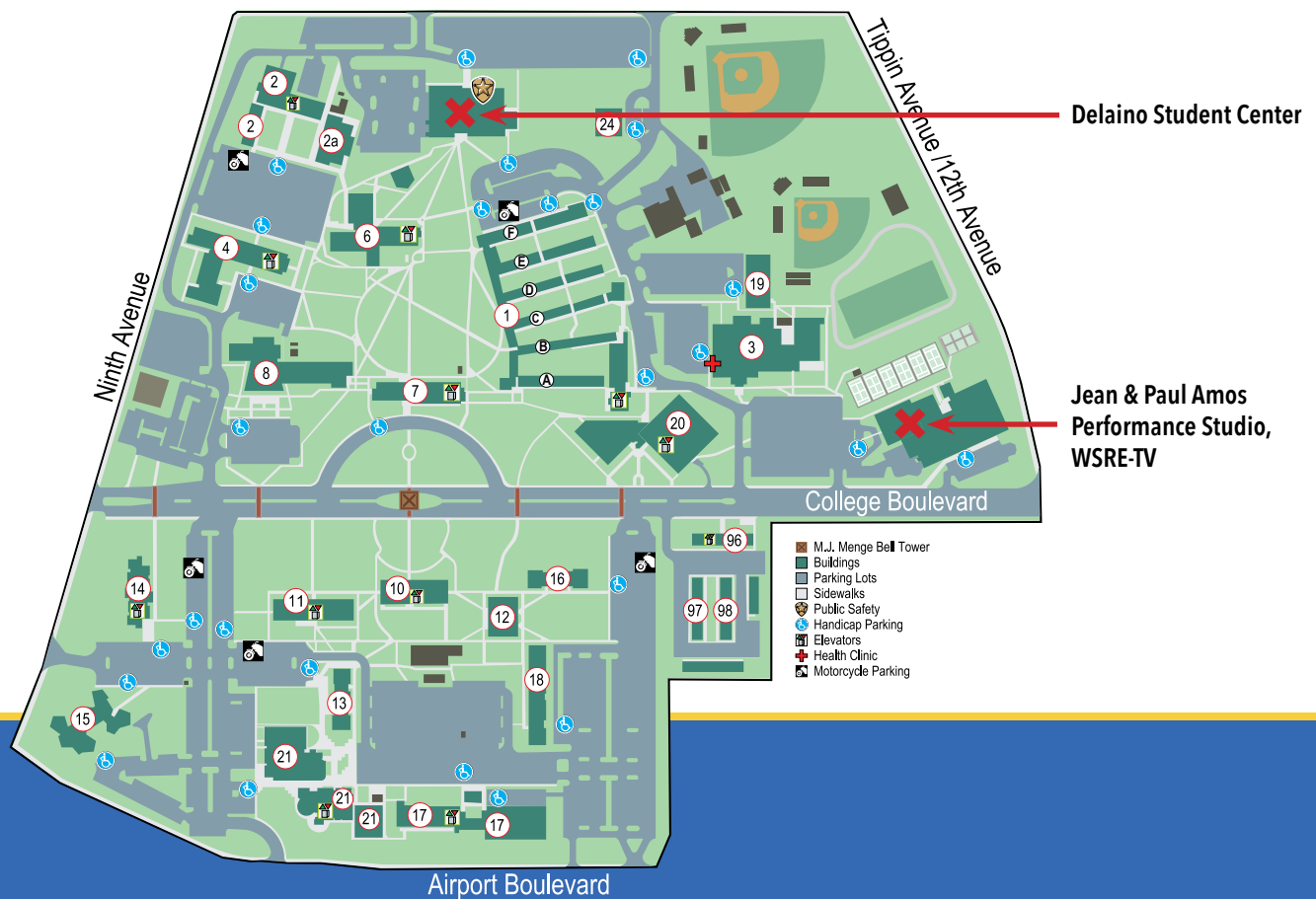
### OCTOBER 31

- 7:30 a.m. Networking and Registration – Doors open
- 8:45–9:30 a.m. **Keynote Speaker, Chuck Loring**, Loring, Sternberg & Associates  
**TEN BEST PRACTICES OF IMPACTFUL BOARDS**  
In this fast paced presentation, Chuck will discuss the common characteristics of high performing boards. You can measure your board against best practices and learn where you can improve.
- 9:45 a.m. **EFFECTIVE GOVERNANCE IS NOT HISTORY AND HABIT, Chuck Loring**, Loring, Sternberg & Associates  
Nonprofit Board Governance is often sabotaged by the Board's lack of ability to adapt to changing times. This session and the one that follows will examine the important topics of board structure and operations, board recruitment, effective board meetings, and more.
- 11–11:30 a.m. **EDUCATIONAL WORKGROUP, Chuck Loring**, Loring, Sternberg & Associates  
In this session, participants will be able to utilize what has been shared to begin building the plan that works for their organization and helps attendees put into practice what they have learned.
- 12:30–1:15 p.m. **WHAT IS COOPERATIVE IMPACT AND HOW CAN IT HELP SECURE GRANTS?, Mary Claire Walther**, Dini Spheris
- 1:15–2 p.m. **TRANSFORMATIONAL GRANTS – ARE YOU READY? CAN YOU SUSTAIN?, Mary Claire Walther**, Dini Spheris
- 2:15–3 p.m. **PANEL ON BEST PRACTICES, Facilitated by Dr. Debbie Douma**
- 3–4 p.m. **Closing Keynote Speaker, Penelope Burk**, Cygnus Applied Research, Inc.  
The foremost expert on Donor-Centered Fundraising, Ms. Burk will share her research that combines lessons learned from the over ¼ million American donors surveyed regarding what motivates giving.



## NOVEMBER 1

- 7:30 a.m. Networking and Registration – Doors open
- 8:45–9:30 a.m. **Keynote Speaker, Penelope Burk**, Cygnus Applied Research, Inc.  
Ms. Burk will share stories of donor frustration and inspiration as she speaks on Donor-Centered leadership and fundraising. Attendees will learn Ms. Burk’s evidence-based formula for keeping donors giving longer and inspiring them to make more generous contributions.
- 9:45–10:30 a.m. **EDUCATIONAL WORKGROUP, Penelope Burk**, Cygnus Applied Research, Inc.  
How to stop donor attrition and hang onto your fundraising staff
- 10:30–11:30 a.m. **EDUCATIONAL SESSION, Penelope Burk**, Cygnus Applied Research, Inc.  
What leadership volunteers do best and how they can raise more money for their organizations by saying thank you the donor-centered way.
- 12:30–1:15 p.m. **EDUCATIONAL SESSION, Michelle Buchanan**, Dini Spheris  
Marketing considerations for the organization seeking transformative change; and, is grant writing marketing?
- 1:15–2 p.m. **EDUCATIONAL WORKGROUP, Michelle Buchanan**, Dini Spheris  
Cooperative grants for transformative change
- 2:15–3 p.m. **PANEL ON BEST PRACTICES, Facilitated by Dr. Debbie Douma**
- 3–4 p.m. **COURAGEOUS TRANSFORMATION, Closing Keynote, Michelle Buchanan**, Dini Spheris  
What must we get right to take our organizations to the next level



## FEATURED TRAINERS



CATHY BROWN  
The Fund Raising School

**CATHY BROWN**, a Pensacola, Florida resident, is the Associate Director of Education at The Fund Raising School (TFRS), Lilly Family School of Philanthropy at Indiana University. She currently serves as lead practitioner faculty for many of the face-to-face professional development courses as well as online courses. Cathy joined TFRS first in a curriculum design capacity, updating course materials, implementing adult learning strategies into course design, and creating new faculty guides and instructional tools.

Cathy has 15 years' experience running small nonprofits and quasi-government agencies, as well as board and volunteer experience in a wide range of subsectors. She also has career experience in k-12 and college level curriculum design, college access, grant proposal writing and grant

management, solid waste and recycling program management, newspaper writing, and classroom instruction ranging from elementary school through college.

Cathy has a Master's in Education from Indiana University and a Bachelor's in Elementary Education from Hanover College. She holds a Certificate in Fund Raising Management, and completed the Graduate Certificate in Philanthropic Studies from Indiana University in 2015, and is currently pursuing Associate Professional in Talent Development (APTD) certification. She is a member of Association of Fundraising Professionals (AFP), Association for Talent Development (ATD), Council for the Advancement and Support of Education (CASE), National Association of Charitable Gift Planners (NACGP) and Grantmakers for Effective Organizations (GEO).



MICHELLE BUCHANAN  
Dini Spheris

**MICHELLE BUCHANAN**, CFRE is a Principal in the Dini Spheris Houston office. When in a tough spot, Michelle will settle for nothing short of success and the celebration that follows achieving a goal. Her goal is to make others better – to strengthen the skills and results of those with whom she works.

Building strong, trusted relationships was one of the secrets to Michelle's success as a development professional and major gift officer. Michelle began her fundraising career at the Wesley Community Center, eventually serving at the University of Houston's main campus. Before joining Dini Spheris, Michelle was a leader among the major gift solicitors at The University of Texas MD Anderson Cancer Center. There, Michelle managed an annual portfolio of over 150

individuals – many of whom she would come to regard as personal friends.

At Dini Spheris, Michelle has served as team leader on numerous projects. Those projects include building a centralized philanthropy program for St. Louis' Mercy Health system, which spans four states and 32 hospitals, as well as working with Medical Center Hospital in Odessa, Texas, to create the first-ever major gift foundation. A graduate of Texas Tech University, Michelle is often heard speaking at major professional conferences in nonprofit, educational and healthcare philanthropy. (See workshop and summit schedules for April 30, May 15 and November 1.)



PENELOPE BURK  
Cygnus Applied  
Research, Inc.

**PENELOPE BURK** understands donors and what they want more deeply than just about anyone in the business. In the last fifteen years, she and her innovative firm, Cygnus Applied Research, Inc., have conducted surveys and research studies with more than a quarter million American donors. She has reached back into their lives to find out about the first time they gave, what motivates their philanthropy now, what their greatest and most frustrating experiences in giving are, and what their dreams are for their philanthropic future.

Penelope's contributions to the fundraising industry can be best summed up as a long list of "firsts":

- She was the first fundraising author to back up her ideas and solutions with evidence from donors
- The first to bring the problem of Donor Attrition to the attention of the fundraising industry, pointing out how much money not-for-profits were losing by failing to hold onto their donors

- The first to offer an evidence-based formula for keeping donors giving longer and inspiring them to make more generous contributions
- The first to document what leadership volunteers do best and how they can raise more money for their organizations by saying thank you the donor-centered way
- The first to document the real impact of the high rate of turnover among professional fundraisers and the first to bring innovative solutions to the table to keep fundraisers loyal, raising more money, and still leaving the office at 5 o'clock!

Penelope is the author of the fundraising classic, *Donor-Centered Fundraising* and she has just published a completely updated and substantially expanded second edition containing all-new research with donors. She has also written two other books as well as more than fifty seminars and dramatic plays. (See summit schedule for October 31 and November 1.)



DEBBIE DOUMA  
Pensacola State College

**DR. DEBBIE DOUMA** is the Dean of Grants and Federal Programs at Pensacola State College.

Since Debbie Douma stumbled into higher education resource development in 2003, Pensacola State College has been successfully awarded over \$45 million in competitive grant funding. Debbie received her A.A. from Irvine Valley College in California, B.A. and M.S.A. from the University of West Florida, and Ed.D. in Higher Education Administration

from the University of Florida. She was awarded the Council for Resource Development Campus Impact Award – National Grant Professional of the Year in 2013. Debbie serves on the boards of the Opening Doors, Inc., the Escambia 4-H Foundation, First City Art Center, and the Association of Florida Colleges Foundation. (See workshop and summit schedules for August 20, October 31 and November 1.)



CHUCK LORING  
Loring, Sternberg  
& Associates

**CHUCK V. LORING**, MBA, CFRE is the senior partner of the Fort Lauderdale and Indianapolis-based firm of Loring, Sternberg & Associates, which provides fundraising and governance consulting services to nonprofits. Chuck is also a Senior Governance Associate for BoardSource (formerly the National Center for Nonprofit Boards) in Washington, DC, offering expertise in board development and other governance issues to nonprofit boards across the country.

Chuck is a past president of the Indiana Chapter of the Association of Fundraising Professionals, is a Certified Fund Raising Executive, and holds a bachelor's degree in communications from the University of California, Santa

Barbara (UCSB) and an MBA from the Marshall School of Business at the University of Southern California. He is a former President of the University of California Alumni Association and a former Trustee of the UCSB Foundation.

Chuck has helped hundreds of local and regional nonprofits across the country improve their governance and such prominent national charities as Special Olympics, The First Tee, Boys and Girls Clubs of America, Girl Scouts USA, The Alzheimer's Association, Easter Seals, Planned Parenthood, Feeding America, Make A Wish America, The League of American Orchestras and the Professional Golfers Association. (See summit schedule for October 31.)



GAIL PERRY  
Gail Perry Associates  
Philanthropy Consultants

**GAIL PERRY** is an international fundraising consultant, keynote speaker, trainer and philanthropy leader, with deep expertise in major gift and capital campaign fundraising. Her Fired-Up Fundraising approach, developed over the past 30 years as a nonprofit philanthropy expert, has helped organizations raise hundreds of millions in gifts.

With over 30 years of experience in successful major gift and capital campaign fundraising, Gail focuses on guiding her clients to transformational gifts that can catapult their organizations to new heights. She is a veteran of over 55 capital campaigns from LA to Maine as consultant, coach or staffer – raising over \$500 million.

Gail was recently named #10 on the list of American's Top Fundraising Experts, published by Philanthropy Media, and

her Fired-Up Fundraising Blog is consistently listed among the top fundraising websites in the world. Her best-selling book, *Fired-Up Fundraising: Turn Board Passion into Action* (Wiley/AFP) has been called the "gold standard guide to building successful fundraising boards."

Gail keynotes fundraising conferences in the US and abroad. She has led board and leadership workshops for national and international organizations around the world.

Gail launched her fundraising career at Duke University and then went on to lead fundraising at the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill. (See workshop schedule for September 26.)



MARY CLAIRE WALTHER  
Dini Spheris

**MARY CLAIRE WALTHER** is a Consultant based out of the Dini Spheris Houston office. Entering college with a vision of changing the world through the foreign service, Mary Claire is now involved in changing lives through the institutions, volunteers and executives she serves as a Dini Spheris consulting team member. Mary Claire enrolled at the University of Chicago to study religion and history. However, after an internship at Interfaith Ministries for Greater Houston, Mary Claire became captivated by the transformative power of philanthropy and the integral role fundraisers play in making dreams a reality. One internship became many, and by graduation Mary Claire had worked in several development departments across Houston and Chicago.

What drives Mary Claire every day is a deep passion for service and a sincere belief that – in the words of Margaret Mead – a "small group of thoughtful, committed citizens can change the world."

Immediately prior to joining Dini Spheris, Mary Claire managed individual giving and the annual fund at Young Women's Leadership Charter School in Chicago. While there, she helped develop the organization's first major gifts program, quadrupling individual gifts within a single year.

Since joining Dini Spheris, Mary Claire has worked with clients throughout Texas and across the country. Engaged in a variety of capital and endowment campaign settings, she has helped development and executive staff to believe that vision – coupled with patient, diligent hard work – can overcome the most daunting challenge. In addition, Mary Claire continues teaching and mentoring the next generation of nonprofit leaders as an adjunct lecturer with the University of Houston Nonprofit Leadership Alliance. (See summit schedule for October 31 and November 1.)

# Nonprofit Center for Excellence and Philanthropy at Pensacola State College

## REGISTRATION FORM

NAME: \_\_\_\_\_

ORGANIZATION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

PHONE: \_\_\_\_\_ CELL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

### SELECT THE OPTION BELOW THAT MOST DEFINES THE DISCOUNT YOU QUALIFY TO RECEIVE (LIMIT ONE):

- I wish to become a member of the Nonprofit Center for Excellence at Pensacola State College (\$100 year)  
 Members receive a 25% discount on the courses below.
- I wish to become an organizational member of the Nonprofit Center for Excellence at PSC (\$250 year)  
 Organizational members receive a 25% discount (for up to three members) on the courses below.
- My organization received a grant from Gulf Power Foundation within the last 2 years – my paperwork is attached.  
 Grant recipients receive a 15% discount on the courses below.
- I am a certified partner of United Way of Escambia County and have attached my certification paperwork.  
 Certified partners of UWEC receive a 10% discount on the courses below.
- I am a member of AFP West Florida Chapter and have attached a copy of my membership card.  
 AFP members receive a 10% discount on the courses below.

### I WOULD LIKE TO REGISTER FOR THE COURSES BELOW:

- HOW TO CREATE A HIGH FUNCTIONING FUNDRAISING BOARD (April 30, 2019) \$75
- SUCCESS WITH COMPREHENSIVE CAMPAIGNS (May 15, 2019) \$75
- SURVIVING AND SUSTAINING IN A GRANT SEEKING WORLD (August 20, 2019) \$75
- FIRED UP FUNDRAISING-THE ART OF RAISING MAJOR GIFTS (September 26, 2019) \$75
- DONOR-CENTERED PROPOSALS & PRESENTATIONS (November 21, 2019) \$75
- COURAGEOUS TRANSFORMATION SUMMIT (October 31-November 1, 2019) \$250

### PLEASE SIGN ME UP (CHECK ALL THAT APPLY):

- eNewsletter Distribution from the Nonprofit Center for Excellence
- Networking notices from the Center
- Lunch with the Experts (\$25 extra)
- I would like to talk to someone about serving as a panelist or trainer

## Member Discount=25%

The Nonprofit Center (NPC) Membership Program qualifies nonprofit professionals for a 25% discount on registration for continuing education hosted by the Pensacola State College NPC. Members receive priority communication on scheduled events and updates on best practices or emerging trends in the nonprofit world. Additionally, members will benefit from access to low cost subscriptions to the Society for Nonprofit Professionals, BoardSource, Foundation Software and GrantStation Insider. Please provide your NPC Membership number when you register for events or educational offerings.

## Individual Membership=\$100

- 25% discount on educational workshops and activities
- The value of this 25% discount in 2019 = \$187.50
- Monthly eNews with best practices and links to valuable grant opportunities
- Notice of relevant nonprofit happenings and guidance on regulatory issues impacting the nonprofit sector

## Organizational Membership=\$250

- 25% discount on educational workshops and activities (applicable for up to 3 members at each event)
- The value of this 25% discount in 2019 = \$562.50
- Membership to the Society for Nonprofit Organizations and access to Nonprofit World and GrantStation Insider = \$695 value
- Monthly eNews with best practices and links to valuable grant opportunities
- Notice of relevant nonprofit happenings and guidance on regulatory issues impacting the nonprofit sector

*Attendees must qualify for discounted registrations.*

*Individuals are limited to one discount value per registration.*

## Gulf Power Foundation

### Grant Recipient Discount=15%

The Gulf Power Foundation was a founding partner in developing the concept of a Nonprofit Center for Excellence and Philanthropy at Pensacola State College. Their commitment enabled PSC to launch the educational offerings seen in this brochure. In honor of this partnership, organizations who have received a grant from the Gulf Power Foundation in the past two years or who have been recently awarded an Amplify! grant will receive a 15% discount on registration for workshops or the annual summit. To receive the discount, please include your grant award paperwork from the Gulf Power Foundation as part of your registration for offerings you wish to attend.



## United Way of Escambia County – Certified Partner Discount=10%

The concept of the Nonprofit Center was validated by attendance to a nonprofit training series that was hosted at United Way of Escambia County from 2015-2017. As a partial impetus to the Center at Pensacola State College, certified partners at United Way of Escambia County will receive a 10% discount to any educational offerings provided at PSC. This is also intended to serve as a recognition of the value that certified nonprofits bring to Escambia County, Florida where the Center is located. To receive the discount, please include your current certified partner notice received from United Way with your registration.



## AFP West Florida Chapter Member Discount=10%

The Association for Fundraising Professionals West Florida Chapter offers members the opportunity to connect with colleagues, engage in creative thinking, network with new friends, and achieve great results in their work. Members of AFP can receive a 10% discount to courses by scanning a copy of the current membership card and attaching that copy to their registration form for classes.



Proudly supported by the Gulf Power Foundation

