

Agenda and Session Descriptions



Wednesday, October 17

Registration, Networking & Continental Breakfast
8:00 a.m. – 9:00 a.m.

Session 1:
9:00 a.m. – 10:15 a.m.

1A: Giving Trends: What to Consider with Changes in Federal Tax Laws & New Donor Giving Habits*

Mimi Ward and Mark Rountree, Ashley|Rountree and Associates

Changes in Federal Tax laws (and some at certain state levels) are impacting and will impact philanthropy. This, coupled with constantly changing ways donors approach their giving, are creating opportunities as well as presenting challenges. Of particular interest are conversations taking place in the world of corporate philanthropy by businesses that are privately held and those that are publicly traded. This session will review tax law changes, explore recent donor giving trends and discuss challenges and considerations for taking advantage of new opportunities.

1B: From Fake News to Fake Newsrooms: How Trends in Modern Media will Impact your Coverage*

Antionette Kerr, Bold & Bright Media

The media landscape now includes citizen journalism, social media trolls and yes, fake news. Antionette will provide you with proven strategies for navigating the new landscape and successfully working with reporters, editors and opinion makers. You'll also gain tips for preparing for crises such as being inaccurately depicted in a story or finding yourself at the center of a social media controversy.

1C: Uncovering Your Authentic Leadership: A Values Workshop for Emerging Leaders

Lisa Williams, Lisa Williams Coaching + Consulting

Young professionals are often promoted to leadership and management positions without formal support or training. As a result, it's easy to feel like you are making your management style up as you go along, trying and failing, or impersonating what a leader "should" be. Lisa's session focuses on developing a leadership style that is aligned with YOUR core values and grounded in a unique sense of purpose. You will uncover the values that drive you; discover how those values form the foundation of your authentic leadership style; and gain practical tools for utilizing your core values as a leadership tool. This self-awareness enables you to be true to your core beliefs at work and will lead to more strategic, effective, and sustainable leadership.

Networking Break
10:15 a.m. – 10:30 a.m.

Agenda and Session Descriptions



Wednesday, October 17 Continued

2018 Election & 2019 General Assembly Preview

10:30 a.m. – 11:45 a.m.

An unprecedented number of challenges face the nonprofit sector. In fact, many would say the sector is under attack... Join us for an important discussion on what's ahead in the 2018 elections and the 2019 Kentucky General Assembly, and how both could impact the sector and your organization's ability to accomplish its mission.

Luncheon & Partner Spotlight ~ sponsored by Crowe, LLC

11:45 a.m. – 1:30 p.m.

Get an update on your state association's work over the past year, learn about partners at the Forum's Nonprofit Marketplace interested in helping make doing business easier and network with your colleagues over lunch.

Session 2:

1:30 p.m. – 2:45 p.m.

2A: Before, During & After: Making Your Event Media Friendly*

Antionette Kerr, Bold & Bright Media

Modern media relations provide nonprofits with many opportunities (and some challenges) for connecting with the media. This interactive session will discuss effective strategies from pitches and press kits, to online newsrooms – with an emphasis on building media relations before, during, and well after your special event.

2B: Overcoming Self-Doubt*

Marian Guinn, MG Coaching & Consulting

Ever feel like an imposter? Many leaders struggle with confidence from time to time. In this workshop we will identify common barriers to self-confidence and consider how we can leverage strengths to bust through barriers, embody confidence and attain greater satisfaction and peace.

2C: Making Senses of the New Laws Impacting Nonprofits

Tad Myre and Mike Fine, Wyatt Tarrant & Combs, LLC; Rachel Spurlock, Crowe, LLC

There have been some significant changes to federal and state laws that directly and indirectly impact nonprofits. Join Tad and Mike for a legal perspective and Rachel with a tax perspective, including the Tax Cuts and Jobs Act and House Bill 443. They'll also peer into their crystal ball to predict what might be on the horizon. You'll leave with an understanding of which apply to your organization, resources to assist you and a roadmap for the potential issues ahead.

Agenda and Session Descriptions



Wednesday, October 17 Continued

Nonprofit Marketplace & Networking Break

2:45 p.m. – 3:15 p.m.

Session 3:

3:15 p.m. – 4:30 p.m.

3A: Is Your Board Driving You Crazy!?: How to More Effectively Navigate Board/Staff Nonprofit Leadership*

Tammy Moloy and Don Tharpe, Ashley|Rountree and Associates

Executive Directors and staff leadership sit in a unique position of authority and leadership, directing staff while also answering to a board of directors. Effective executives learn to see their board as a partner rather than a boss. They also engage and mobilize their board to perform high priority work that benefits the organization. This session will explore some of the habits and mindsets that executive directors can use to create a strong sense of shared leadership with the board – while maintaining your own sanity!

3B: Building Your Nonprofit Brand on a Budget*

Antionette Kerr, Bold & Bright Media

Does your nonprofit have a brand? Even if Have you thought of how your branding impacts your nonprofit? What does your nonprofit's brand (or lack thereof) say about your organization and its mission? In this session, Antionette will show you how to develop a bold, broad and more strategic approach to promoting your brand through media outlets. We will discuss tools to boost your brand, simple tips to measure brand effectiveness and explore some marketing hacks for boring brands.

3C: Worker Classification Issues – Who's Who; What's What; and Wow Does Our Nonprofit Stay Out of Hot Water?

Jeff Calabrese, Stoll Keenon Ogden

Many nonprofits are eager to utilize volunteers and interns to help them accomplish their mission. Some organizations also use independent contractors as a way to save money and hire only project specific expertise. Jeff will provide an overview of the federal and state guidelines to be sure your organization is complying with the law.

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Thursday, October 18

Registration, Networking & Continental Breakfast

8:00 a.m. – 9:00 a.m.

Session 4:

9:00 a.m. – 10:15 a.m.

4A: The Mystery of Major Gifts*

Timothy Burcham, Burcham Solutions Group

Have you ever wondered why you're struggling to raise major gifts? Your mission is compelling, you've hired (or are) a development staff person able to ask for gifts and your board has donor connections, but the pieces are not falling into place. In this session, we'll review the essentials to fundraising success and discuss the strategies, tools and methods you can use immediately to solve the mystery of major gifts.

4B: How to Become a Thought Leader & Media Darling*

Antionette Kerr, Bold & Bright Media

Positive earned media can help you establish your brand, bring attention to your cause and build awareness among potential donors and funders. But it doesn't happen magically. It's often the result of a media relations strategy built upon being responsive and cultivating relationships. This session will discuss tips for being accessible, available and accurate – making you a "go to" source with reporters.

4C: Building an Inclusive Culture

Demetria Miles McDonald, Decide Diversity

Diversity is being invited to the party, inclusion is being asked to dance...or is it? Inclusion has become a catch all for engagement, retention and development, but what does it really mean? Inclusion can make or break your organization's ability to effectively serve, lead and create. During this session you'll unpack what inclusion means in your organization, and how you can foster a culture where employees, volunteers, and clients feel safe, valued and wanted. You'll gain knowledge for creating an inclusive environment, learn how to develop inclusive skills and behaviors, and discover how to package your organization's inclusive culture for prospective employees, volunteers and clients.

4D: Get Ahead of FASB Reporting Updates

Judy Simpson, Blue & Co.

Deadlines for several new accounting and reporting updates are fast approaching - including one standard that focuses on the presentation of financial statements for nonprofits - and will have a significant impact on how nonprofit organizations report under GAAP. This session will provide the latest news on the reporting requirements, how they will impact your organization, and steps, including examples, to help you prepare.

Agenda and Session Descriptions



Thursday, October 18 Continued

Nonprofit Marketplace & Networking Break
10:15 a.m. – 10:45 a.m.

Session 5:
10:45 a.m. – 12:00 p.m.

5A. Fresh I.D.E.A.S. for Diversifying your Donor Base*

Antionette Kerr, Bold & Bright Media

Are communities of color reflected in your nonprofit's donor base? In this session, Antionette will introduce Fresh I.D.E.A.s - Inclusion, Diversity, Equity, Access. Better understanding each of these attributes will help your organization increase engagement donors that truly represent your community.

5B. Legislators Are People Too – Making the Connection and Building Relationships*

Panel Discussion

Legislative advocacy is critical to the success of nonprofits and our sector. This panel will share their perspective on the tools necessary to build collaborative relationships with legislators and executive branch officials. Participants will gain suggestions for “breaking the ice” and tools to build mutually beneficial relationships that encourage legislators to prioritize your organization and cause.

5C: Avoiding “Starbucks Moments” and Other Diversity and Inclusion Disasters

Demetria Miles McDonald, Decide Diversity

Prioritize diversity and inclusion today to prevent disaster, or scramble to recover from a diversity and inclusion nightmare tomorrow. The choice is yours! No matter where your organization is in the diversity and inclusion journey, mistakes and pitfalls can occur. Starbucks, Papa Johns, H&M and so many other organizations unintentionally created diversity and inclusion problems that are completely avoidable. How close is your organization to a “Starbucks Moment?” Don’t allow your organization to fall prey to disasters that can take years to recover from, both from a reputational and financial standpoint. In this session, learn how to strategically build your diversity and inclusion strategy by analyzing the disasters from organizations you know and love.

5D: Outsourcing: An Efficient Option for Your Back Office?

Justin Hubbard, Dean Dorton

Limited funding and/or staffing expertise can often hamper a nonprofits’ ability to effectively handle important finance, human resources and IT functions necessary for the organization’s success - regardless of the size of the nonprofit. Justin will provide an overview of some of the options for outsourcing these operations, national and state trends in outsourcing, pros and cons of this solution and what to look for when evaluating if an outsourcing solution is right for your nonprofit.

Agenda and Session Descriptions



Thursday, October 18 Continued

Kentucky Nonprofit Awards Luncheon ~ sponsored by Anthem Blue Cross & Blue Shield in Kentucky

12:00 p.m. – 1:45 p.m.

Session 6:

1:45 p.m. – 3:00 p.m.

6A: Fundraising's Real Silver Bullet? Stewardship*

Lee Ellen Martin, Fundraising Consultant

An organization's next best donor is a current donor. In the crowded world of fundraising solicitations and with the changes to charitable giving tax incentives, stewardship of your most important supporters is even more critical to maintaining their commitment. Lee Ellen will highlight the dangers of neglecting donor stewardship and help you create strategies to minimize donor churn and maximize retention to ensure donors have a great philanthropic experience when they donate to your organization.

6B: Reframing the Story: Presenting Your Mission to Better Connect*

Antionette Kerr, Bold & Bright Media

Nonprofits are often seen by policy makers, business leaders and some donors as "always having their hand out" - merely "takers." While we are likely actively engaged in raising funds for our mission, nonprofits also have an important opportunity to educate constituents and reframe our stories to communicate the vital role we might play in the economy; as a community problem solver; an actual saver of dollars in a government budget; and more. In a crowded world where more nonprofits are clamoring for fewer resources, understanding when and how to reframe your story for the right audience is a tool every nonprofit must have in their toolbox.

6C: Managing Difficult Conversations with Ease

Marian Guinn, MG Coaching & Consulting

Few people truly enjoy conflict but avoiding or delaying a difficult conversation can damage relationships and create other negative outcomes. In this workshop we will reframe thinking around engaging in difficult conversations. Participants will practice effectively delivering constructive feedback and expressing disagreement with a boss or coworkers.

6D: Beyond #Me Too: Building Harassment-Free Workplaces in the Nonprofit Sector

Sharon Gold, Wyatt Tarrant & Combs LLP

Workplace harassment is an unacceptable and avoidable risk. Yet it still persists, even in the nonprofit sector. What is your organization doing to prevent it? Employers must provide a harassment-free work environment to protect their employees, volunteers and donors – and the organization's resources and reputation. This session focuses on understanding harassment, identifying risks and learning how to address and prevent it through anti-harassment policies and procedures – real, ready-to-implement ways to make your workplace harassment-free.

Agenda and Session Descriptions



Thursday, October 18 Continued

Networking Break
3:00 p.m. – 3:15 p.m.

Session 7:
3:15 p.m. – 4:30 p.m.

7A: From Board Member to Fabulous Board Ambassador in 10 Minutes or Less*

Antionette Kerr, Bold & Bright Media

Yes, in only 10 minutes, you can help your board members serve as fabulous ambassadors for your organization and its mission. From the elevator to media interviews, this session will provide solid strategies for helping board members easily stay on message. Hint: You don't need more materials, more facts, more figures, because board members insist that "less is more!"

7B: Opportunities and Pitfalls for Nonprofits Engaging in Political Advocacy*

Shelia Schuster, Advocacy Action Network

Just around the corner and jockeying for 2020 is already under way. The past several years have involved significant swings in policy, and the near future promises more of the same. In these times of uncertain policy, the nonprofit sector's appetite to participate in lobbying, advocacy, and education is expanding. This session will provide a roadmap for nonprofits to follow when engaging in political advocacy. Shelia will provide an overview of the do's and don'ts for successful advocacy for your cause, including reporting requirements.

7C: Legacy Leadership: A Facilitated Conversation with Seasoned Leaders and Executives

Lisa Williams, Lisa Williams Coaching + Consulting

Maya Angelou said, "At the end of the day people won't remember what you said or did, they will remember how you made them feel." A leader's legacy is much less about who or what they lead and much more about how they lead. Title and responsibilities do not make a leader, the leader is made by how they show up and how they are received by others. Imagine the possibilities of the impact you can make if you strive to be a more intentional leader, by understanding that how you lead yourself impacts your ability to lead others and this contributes to the legacy you leave in your organization on a day-to-day basis and beyond. In this session, Lisa will challenge leaders to explore key questions that will help them define their personal Leadership Legacy Plan outlining who they are, what they value, and the difference that they want to make as a leader.

7D: Health Benefits Solutions for Nonprofits Large and Small

Kelly Harding, Peel & Holland

Offering a competitive and affordable health benefits program for your employees is indeed possible. Join Kelly Harding with KNN partner, Peel & Holland to learn about the options available to nonprofits in today's market - including KNN's health benefits program and other options.

*Sessions sponsored by UK Philanthropy

**Sessions sponsored by Vimarc