

# Agenda and Session Descriptions

## Tuesday, October 29

### Registration, Networking & Continental Breakfast

8:00 a.m. – 9:00 a.m.

### Session 1:

9:00 a.m. – 10:15 a.m.

#### **1A: 5 Steps to Developing a Bulletproof Marketing Strategy**

*Richmond Simpson and Todd Krise, Vimarc*

Does your marketing support your business objectives? Aligning your goals with your marketing strategy is one of the tried and true secrets to success. In 75 minutes, you'll learn the key to crafting a case for support, establishing campaign objectives, defining your audience, determining a deployment plan, and measuring and optimizing your efforts. Whether you're looking to generate awareness or increase donations, learn the essentials to building a strong, foundational strategy.

#### **1B: The Final Countdown to the 2020 Census**

*Leslie Rodgers, U.S. Census Bureau*

There's much at stake for Kentucky's communities with the 2020 Census. Learn more about efforts to help your nonprofit easily engage in census outreach to help us be sure every Kentuckian is counted and the Commonwealth gets its fair share of federal dollars for schools, health care, housing, infrastructure and more.

#### **1C: Leveraging the Logic Model**

*Lisa Williams, Lisa Williams Coaching + Consulting*

Toss your preconceived notions of an outdated, overused logic model out the window. Facilitator Lisa Williams has reimagined the logic model by flipping it on its head and the result is an innovative tool, and philosophy, that opens individuals, teams and organizations to possibilities of achieving the goals that matter most. Participants will leave this workshop with a new perspective about planning for and achieving successful outcomes.

### Networking Break

10:15 a.m. – 10:30 a.m.

## **2019 Gubernatorial Race Preview & Our Sector's 2020 Public Policy Strategy**

10:30 a.m. – 11:45 a.m.

Join us to hear from the two candidates running for Governor of the Commonwealth: incumbent Governor Matthew Bevin (invited) and Attorney General Andy Beshear (invited). You'll also learn more about the public policy priorities of the sector, including what's ahead in the 2020 Kentucky General Assembly that could impact your organization's ability to accomplish its mission.

# Agenda and Session Descriptions

## Tuesday, October 29 Continued

### Luncheon & Partner Spotlight

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 helping you do business easier; and network with your colleagues over lunch.

### Session 2:

1:30 p.m. – 2:45 p.m.

#### **2A: The 4 Phases of a Wildly Successful Giving Day**

*Julia Campbell, JC Social Marketing*

Whether it's a statewide giving day like Kentucky Gives Day, a regional giving event or an international day of giving back like #GivingTuesday, there are four critical phases that all wildly successful giving day campaigns have in common. Join Julia Campbell, a nonprofit marketing strategist who has helped dozens of nonprofits launch successful online fundraising and giving day campaigns, as she walks you through each step required to plan, launch, execute, and cultivate donors during a profitable and effective giving day campaign. Participants will leave with a customized blueprint and calendar that they can start using immediately to launch and implement your very own wildly successful giving day fundraising campaign.

#### **2B: Managing Stress**

*Marian Guinn, MG Coaching & Consulting*

Feeling Stressed? Of course you are! With too much on your plate, deadlines looming, people counting on you, and your own expectations for yourself. In this workshop we will identify and discuss seven ways to defeat stress, looking at mindset and motivational style.

#### **2C: QuickBooks for Nonprofits: Improving your Usage and Reporting**

*Judy Simpson and Nancy Orben, Blue & Co.*

Make QuickBooks work for you! QuickBooks can be a great tool for your organization's growth and save you a lot of time on reporting. This session will show you different tasks and features you might be missing out on. We will also cover how to customize QuickBooks reports for program and grant reporting. You'll also be able to pick up tips on reporting for nonprofits, including board meeting reports and audit requests.

#### **Nonprofit Marketplace & Networking Break**

2:45 p.m. – 3:15 p.m.

# Agenda and Session Descriptions

## Tuesday, October 29 Continued

### Session 3:

3:15 p.m. – 4:30 p.m.

#### **3A: 10 Myths about Social Media for Nonprofits**

*Julia Campbell, JC Social Marketing*

Social media was once promised as the silver bullet for nonprofit fundraising. Start posting, start tweeting, start Instagramming - and the donations will just roll in! Sadly, that was never the case. In 2019, organic (unpaid) reach is down dramatically, social media algorithms prioritize friends and family over businesses and brands, and millions upon millions of pieces of content are uploaded every single day. To raise money and awareness on social media requires concerted, consistent effort and creativity, as well as resources, staff time, professional know-how, and even grit. Join Julia Campbell, a nonprofit marketing strategist who has helped dozens of nonprofits launch successful social media marketing and fundraising campaigns, as she walks you through the ten most pervasive social media myths - and how to combat them at your organization. Participants will walk away with increased clarity and confidence around social media, as well as a One-Page Social Media Strategy Worksheet to start from scratch or improve current social media work at their nonprofit.

#### **3B: When to Walk Away from Difficult Sponsors**

*Parker Harrington, Sponsorships Plus*

There are times when the best of intentions lead to meager results. And a sponsor relationship is costing us more than it's worth. Attend this fast-paced session and understand the key steps to assessing outcomes, strategies for difficult conversations, techniques to realigning benefits and approaches to part ways amicably if it's just not working. Case studies from various sized nonprofits, including associations, bring even more clarity to the workshop content. Plus create a platform to avoid not-so-productive partnerships in the future.

#### **3C: Toward Viability: Understanding the State of the Nonprofit Workplace**

*Richard Young, Megan Gulla, Loren Wood, CivicLex*

In the first half of 2019, CivicLex conducted an intensive research project on the workforce health of Fayette County's nonprofit sector. Join CivicLex as they present their findings and discuss what lessons can be learned for nonprofit organizations across the Commonwealth. The session will also contain a workshop to discuss these issues as they apply in your community and will seek to discover what we can do collectively to address them as a sector.

# Agenda and Session Descriptions

## Wednesday, October 30

### Registration, Networking & Continental Breakfast

8:00 a.m. – 9:00 a.m.

### Session 4:

9:00 a.m. – 10:15 a.m.

#### **4A: Storytelling in the Digital Age - Strategies to Stand Out, Get Noticed, and Build Your Movement**

*Julia Campbell, JC Social Marketing*

Stories have the power to persuade, to captivate, and to move people from passive to active. Human brains are wired to remember stories - not just hear or listen to stories, but to experience them along with the storyteller. While the power and the principles of great storytelling have not changed since humans began to communicate, the landscape in which to tell stories certainly has. Digital technologies have fundamentally changed the way people research, consume, and share information. The current fast-changing, always-on digital reality demands ever-more creative approaches to storytelling - to grab attention, to pique curiosity, and to inspire action. How can we collect, craft, and share stories in order to take our audience from passive to active? Which channels should we use to maximize visibility for our stories? How can we make complex and difficult issues come to life through stories? This session will walk you through the secrets to nonprofit storytelling success in the digital age. Participants will walk away with actionable strategies, inspiration, and real-world examples of ways that even small nonprofits can get results with digital storytelling and digital access to the printable *Storytelling in the Digital Age Workbook* and Content Calendar template to start building their own digital storytelling plan.

#### **4B: The Intended and Unintended Consequences of your Investment Policies**

*Clint Long, WealthSouth*

Your nonprofit's investment policies can have unintended consequences. Join us for a discussion on whether your organization is ready for a planned giving program; understanding donor motivation; investment policy best practices; how these policies should align with your organizational goals and investments your nonprofit may want to avoid.

#### **4C: It Takes a Village: Working Together to Remove Social Barriers for Better Health Outcomes**

*Morgan Kirk, WellCare*

Data is often critical to your organization's funding requests. And it's not always easy to collect... WellCare Health Plans Community Connections Program partners closely with nonprofits and community-based-organizations throughout Kentucky to remove the barriers and address social service gaps that improve health outcomes and create systemic change. These partnerships have resulted in data that demonstrates improved health outcomes and increased access to care. Join WellCare and some of their partners (are you having others join you?) to learn more about these partnership opportunities and their data analysis that could assist your organization in seeking more sustainable funding.

# Agenda and Session Descriptions

## Wednesday, October 30 Continued

### **4D: Wild Times on the Nonprofit Frontier**

*Tad Myre, Michael Fine, Wyatt, Tarrant & Combs*

Tad and Mike will draw from their personal experiences and discuss knotty issues that can come up with small to medium-sized nonprofits, peppering their discussion with anecdotes. They will focus on the humorous, the unusual and the bizarre to share valuable lessons on good governance, compliance and problem solving.

### **Nonprofit Marketplace & Networking Break**

**10:15 a.m. – 10:45 a.m.**

### Session 5:

**10:45 a.m. – 12:00 p.m.**

### **5A. Storytelling in the Digital Age - Strategies to Stand Out, Get Noticed, and Build Your Movement (Continued)**

*Julia Campbell, JC Social Marketing*

### **5B: The Yin and Yang of Engaging Donors, Volunteers and Influencers**

*Parker Harrington, Sponsorships Plus*

Raising awareness in communities for our mission is a top priority. And we understand that the more focused task that follows awareness raising -- building relationship with people who are most interested in our work and likely to become involved in our work -- is time consuming. But what if there was one system -- with two key components -- to streamline starting conversations and engaging those with real interest? And what if it helped to bring a little more order to everything you're currently doing? Learn how to simplify your engagement process into a yin and yang, and produces better outcomes. We will discuss case studies from various sized nonprofits, including associations.

### **5C: Boards that Make a Difference**

*Florence Tandy, Leadership Bridges*

High functioning nonprofits rarely exist without strong, committed, and knowledgeable boards leading the way. In this workshop we will explore best practices in board development, structure, and meeting design using KNN's recently revised Principles and Practices to guide our discussion. And because boards will be boards, we will also discuss what to do when your board members behave badly.

### **5D: Getting Started With D&I**

*Demetria Miles-McDonald, Decide Diversity*

Diversity and inclusion in everyday practice can be very overwhelming and it can be difficult to determine where to start. Effective diversity and inclusion looks at the entire employee lifecycle to better understand where bias, discrimination and inequality may creep in and camp out. Through case studies and real-world scenarios, you'll get an overview of successful diversity and inclusion initiatives and how organizations have implemented them, as well as a plan for developing initiatives that create a culture where diverse individuals can thrive!

# Agenda and Session Descriptions

## Wednesday, October 30 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: Social Enterprise 101: New Ideas, New Revenue, More Mission Impact**

*Tom Bishop, CauseImpact*

Join CauseImpact for hands-on exploration of how social entrepreneurship can help you to increase innovation, grow your revenue, and amplify your mission. If you've often wondered if social entrepreneurship is a good fit for your organization or have a strategy cooking, this session is for you.

### **6B: Charitable Giving is Changing Part 1: New Strategies for Donor Retention & Annual Giving:**

*Jeff Ashley, Mark Rountree, David Cobb and Lisa Resnik, Ashley|Rountree & Associates*

We've all seen the data and read the headlines -- charitable giving is changing, and for a variety of reasons. What reasons are valid? What should you be concerned about? And what should you do? Part 1 of this session will deal with strategies and solutions to continue to engage and secure gifts from smaller/mid-level donors, focusing on donor retention, annual giving, leveraging social media and building/securing a broad and deep base of donors. Join the team from Ashley|Rountree and Associates for this interactive session designed to learn proven -- and still to be prove -- methods to maximize sustainable giving and retain/grow donors in these changing times.

### **6C: Inspirational Leadership**

*Marian Guinn, MG Coaching & Consulting*

Research shows that anyone can become an inspiring leader. When employees aren't just engaged, but inspired, organizations see real breakthroughs. In this workshop we will identify the attributes of inspirational leaders and consider how we can leverage our strengths to bring greater inspiration to each other and the workplace at large.

### **6D: Tax and Accounting Update**

*Kim Scifres and Alice Cowley, Crowe*

This session will cover a general overview of the IRS Form 990, as well as provide an update on Kentucky sales tax as it relates to not-for-profits. The accounting update will also cover the recently issued ASU 2018-08 related accounting for Grants & Contracts that is required to be implemented by not-for-profits in the next fiscal year.

### **Networking Break**

**3:00 p.m. – 3:15 p.m.**

# Agenda and Session Descriptions

## Wednesday, October 30 Continued

### Session 7:

3:15 p.m. – 4:30 p.m.

#### **7A: Leverage the Power of Volunteers to Enhance Your Organization's Mission**

*Amy Potts, John Gillig, Serve Kentucky*

Are you tired of putting out fires with your volunteer program? Join us to learn about research proven methods that will help you gain a greater return on your organization's volunteer investment to better achieve your mission, increase your social impact and strengthen communities. Nonprofit leaders will share best practices in volunteer engagement and you'll learn about new training opportunities and the volunteer recognition programs of Serve Kentucky, the State Service Commission on Volunteerism.

#### **7B: Charitable Giving is Changing Part 2: Strategies for Major and Planned Giving**

*Jeff Ashley, Brian Cohoon, Paula Swope and David Cobb, Ashley|Rountree & Associates*

Part 2 of this session (and don't worry if you miss Part 1!), will focus on the impact of the changes to tax policy on charitable giving that still may not be known for at least another year. You may be surprised to hear that some of the changes aren't all bad news -- especially for major and/or planned giving programs, and for corporate giving and engagement. This session will discuss strategies for nonprofits with existing programs or those ready to launch and grow, helping your nonprofit implement strategies to capitalize on the new tax law changes and focus on major and planned giving opportunities. Join the team from Ashley|Rountree and Associates for this interactive session designed to learn proven -- and still to be proven -- methods to maximize sustainable giving and retain/grow donors in these changing times.

#### **7C Advancing Our Understanding of Bias and Privilege within Our Organizations**

*Demetria Miles-McDonald, Decide Diversity*

If you've spent time developing a diversity and inclusion initiative, you probably have heard of bias and privilege. There are many misconceptions surrounding bias and privilege, why they exist, and how we can manage them. Bias and privilege are both touchy topics that can easily leave people feeling defenseless. Learn how to facilitate conversations within your organization that are equally focused on the 'problem' of bias and privilege, as well as, the 'solution.' In this advanced diversity and inclusion workshop, learn how one's intersectional identity is privileged and marginalized; how one's intersectional identity is privileged and marginalized compared to others; and how to use one's privilege to fight on behalf of others. People are multidimensional and complex, focusing on bias and privilege from an intersectional perspective helps expand our definition of diversity, inclusion and equity.

#### **7D: 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.