

# SYMPOSIUM ON MAJOR GIFTS



Creating the Environment for Major Gifts through Meaningful Engagement

September 29, 2011 | 8:00 am - 5:00 pm  
Bell Harbor Conference Center | Seattle

Join us for our 4<sup>th</sup> annual look at the environment needed for major gifts and the ingredients and leadership qualities that go into the most productive, professional and meaningful fundraising programs.

**REGISTER ONLINE:** [www.afpWASHINGTON.org/symposium](http://www.afpWASHINGTON.org/symposium)

#### Registration Pricing:

**Early Bird** Until 9/01/11: Members \$180 | Non-members \$225

**Full Price** After 9/01/11: Members \$205 | Non-members \$285

**CEO Summit 8:00-11:00am Only:** \$125

#### GOALS FOR THE DAY

**2011 Symposium Theme: "Meaningful Engagement":** *If all of your stakeholders are meaningfully engaged with the mission, donors will see you as a vibrant organization they want to be a part of, advocate for and bring others into. They will join you in a lifelong relationship that is meaningful (and of course, financially rewarding!) for all involved.*

**Good to Great:** Meaningful Engagement is only useful if we deliver higher results that impact on our mission

**Influence:** What role do you personally play in winning over internal and external stakeholders?

**Impact:** Where do you focus to create the highest impact developing stakeholders that want to be a part of your organization?

**The Engagement Journey:** Once you start the journey with your stakeholders, how can you methodically create a model for meaningful engagement?

**Messages:** How do you create new and powerful engagement messages?

#### PRESENTING SPONSOR:



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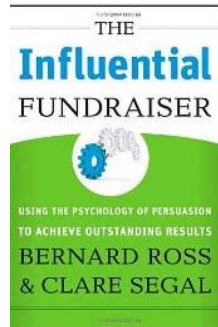
# AFP WASHINGTON'S 4TH ANNUAL SYMPOSIUM ON MAJOR GIFTS

## FEATURING:

### BERNARD ROSS



[Bernard Ross](#), co-founder of the U.K.'s ground-breaking [Management Centre](#), co-author of [The Influential Fundraiser](#) and [Breakthrough Thinking for Nonprofit Organizations](#), and all-around fundraising innovation and management luminary. Bernard brings humor, worldly experience and a business



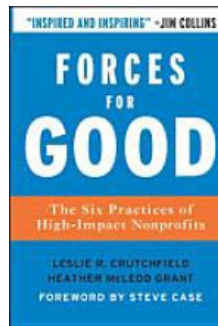
framework to our focus on “Meaningful Engagement” starting with the qualities of executive leadership during the CEO Summit, followed by addressing psychology and neurology, messaging, and models for engagement.

### HEATHER McLEOD GRANT



What makes great nonprofits great? Not large budgets. Not snazzy marketing. Not perfect management. The answer is not what you might think.

[Heather McLeod Grant](#) co-authored the landmark case study, [Forces for Good: The Six Practices of High Impact Nonprofits](#), surveying



thousands of nonprofit leaders and was surprised at the six common practices of the most successful organizations. She will apply this case study to the qualities of successful philanthropic cultures to challenge us to look beyond our development office to the larger culture of our organization.

**WHAT IS A SYMPOSIUM?** *Noun, plural sympo-sia "a social gathering at which there is a free exchange of ideas"*

In 2008, AFP Washington took an inventory of our field, and what we found was unsettling and unacceptable: the fundraising profession continued to mystify, frustrate and confuse too many people in too many ways, wasting resources and mission. At the same time, there was an exponential increase in philanthropy coming our way...if we were prepared. Another conference was not the answer—leadership on all parts was. With a clear focus on fundraising leadership, AFP Washington created an environment where we could talk, challenge, examine and generate new ways of approaching our profession. We created the Symposium on Major Gifts—a stimulating gathering at which we freely exchange ideas about how to create an environment for major gifts.

**WHAT IS OUR FOCUS?** Our annual Symposium approach is to drill down on the components of a successful fundraising environment and philanthropic culture as well as the CEO, Trustee and professional fundraising leadership needed to make it happen. In 2008, we focused on “*Core Competencies of Major Gifts*,” in 2009 on “*Philanthropic Culture*” followed by “*Collective Leadership*” in 2010. This year, the Symposium’s Program Committee, a team of 22 experienced fundraising professionals, identified the focus of “*Meaningful Engagement*” as an essential ingredient for maximizing major gifts today.

**AFP WASHINGTON'S BELIEF PROPOSITION:** We weave leadership throughout every aspect of the program, reflecting AFP Washington's firm belief that “*inspired fundraisers fuel the nonprofit sector by being powerful catalysts for positive change.*”

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## PROGRAM SCHEDULE

TIME	TOPIC	COMPETENCY	TAKE-AWAYS
7:30 – 8:00 am	<b>REGISTRATION AND CONTINENTAL BREAKFAST</b> Worth getting here on time for!	<ul style="list-style-type: none"> <li>Fuel</li> </ul>	Full stomach to absorb the amazing day ahead
8:00 – 10:00 am  <i>ALL ATTENDEES WELCOME</i>	<b>CEO/LEADERSHIP SUMMIT: You're Good, But Could You Be Great?</b> <i>(CEOs, Executive Directors and Trustees are welcome to join this first session of the Symposium for a special price of \$125)</i>  The Symposium kicks off with a session specifically tailored for CEO's, E.D.'s, and Trustees to join the Symposium to gain executive level framing, management tools, and resources to assess, manage and lead successful major gift fundraising. <b>Bernard Ross</b> will take on the principles of Jim Collins' book <i>Good to Great</i> to challenge our assumptions on the key principles and drivers for change to be successful. This session explores where engagement fits into a wider context.	<ul style="list-style-type: none"> <li>Fundraising Management</li> <li>Leadership</li> <li>Learning</li> <li>Philanthropic Culture</li> </ul>	Understanding of the key drivers for a productive non-profit culture and the qualities of executive leadership in high impact cultures  We'll use a specially developed =mc G2G scorecard to assess how far you are on the "Good to Great" journey and where you have to improve
<b>CEO ONLY FORUM</b> 10:00 – 11:00 am  <i>OPTIONAL</i>	<b>CONFIDENTIAL CEO FORUM WITH AFP-WA LEADERSHIP</b> CEOs, E.D.s and Trustees are invited to join Susie Burdick, CEO of Hearing Speech & Deafness Center and Mauri Ingram, CEO of Whatcom Community Foundation for a confidential discussion of what AFP can provide you and/or your development team to increase your fundraising productivity.  <b>SPONSORED BY : Pacific Continental Bank</b>	<ul style="list-style-type: none"> <li>Fundraising Management</li> <li>Peer-coaching</li> </ul>	CEO's, E.D.'s, and Trustees address your organization's specific needs with AFP-WA leadership
10:00 – 10:30 am  <b>BREAK</b>	<b>THE DOCTOR IS IN: Personal Mentoring for Your Own Unique Challenges</b> Each year, the Symposium has offered free advice throughout the day from sought-after fundraising pros. These ever-popular fundraising "doctors" will be in the house to answer your questions one-on-one.	<ul style="list-style-type: none"> <li>Professional Development</li> </ul>	Personal peer coaching to address your own specific needs and challenges
10:30 am – 12:00 pm	<b>INFLUENCE: What You Can Do</b> Influence and engagement: this session develops you as an influencer, using leading edge skills and techniques from psychology and neurology to engage and win over supporters and stakeholders. The session draws on <b>Bernard Ross' book <i>The Influential Fundraiser</i></b> .	<ul style="list-style-type: none"> <li>On-going Donor Centered Communications</li> <li>Meaningful Donor Engagement</li> </ul>	You will know how you can leverage your influence to shape and share your ideas- with donors, board members and other stakeholders

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TIME	TOPIC	COMPETENCY	TAKE-AWAYS
12:00 – 1:30 pm  LUNCH	<b>LUNCHTIME KEYNOTE: Heather McCleod Grant, Co-author, <i>Forces For Good: The Six Practices of High Impact Nonprofits</i></b> Heather McCleod Grant will share the six common practices of the most successful organizations and, for the first time, take her findings further into how they relate to a high engagement and healthy philanthropic culture.	<ul style="list-style-type: none"> <li>• Management</li> <li>• Philanthropic Culture</li> <li>• Organizational Development</li> </ul>	Through national case studies, understand the larger context of high impact nonprofits and how it relates to productive major gift environments
1:30 – 1:45 pm	<b>BREAK</b>		
1:45 – 3:15 pm	<b>THE ENGAGEMENT JOURNEY</b> In this session, we'll look at models to generate an effective donor/supporter journey – and how to improve the quality of the engagement. Bernard Ross will draw upon global studies enabling you to understand how and when a donor makes decisions.	<ul style="list-style-type: none"> <li>• Leadership/ Management</li> <li>• Management and Philanthropic Culture</li> </ul>	Participants will understand how and when they can move their donors along the supporter journey
3:15 – 3:30 pm  BREAK	<b>THE DOCTOR IS IN</b> This year, the Symposium will have additional "Social Media" doctoring from Northwest media experts (afternoon only).	<ul style="list-style-type: none"> <li>• Professional Development</li> </ul>	Personal peer coaching to address your own specific needs and challenges
3:30 – 4:30 pm	<b>MEMORABLE MESSAGES: Engaging Heart and Head!</b> Generating high engagement messages: <b>Bernard Ross</b> will explore how to make your messaging stand out from the competition making it 'sticky' and high touch so that donors and supporters remember you and your messages and feel fully engaged in your cause.	<ul style="list-style-type: none"> <li>• Communications</li> <li>• Meaningful Donor Engagement</li> <li>• Personal Professional Development</li> </ul>	After a stimulating day of looking at the larger picture, you will leave knowing what you can do right now to affect meaningful engagement
4:30 – 5:00 pm	<b>CELEBRATION RECEPTION With Your 400 New Friends and Peer Supporters</b>	<ul style="list-style-type: none"> <li>• Refueling the Tank</li> </ul>	Refreshed, energized and fully supported for the journey ahead!

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**QUESTIONS? Contact the AFP Washington Chapter office at**  
[office@afpWASHINGTON.org](mailto:office@afpWASHINGTON.org) or call 206-367-8704

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