



Development Day Agenda

Track 1	Practical
Track 2	Advanced
Track 3	Development
Plenary	Plenary

Thursday, June 05, 2014

7:30 am	Registration/Networking/Continental Breakfast	
	Opening Plenary (Room VT 500)	
8:00 - 9:00 am	Exhibits Open	<p>The Future of Gift Planning Jay Steenhuisen, Founder, Steenhuisen Associates, PPP Board Chair Over the past 25 years, the role of the gift planner has experienced a tremendous arc: moving from the position of isolated technician, to being a key player, to serving as a divergent specialist. While gift planning is currently practiced by more individuals than at any time before, there are increasingly fewer full-time gift planner positions. During this session, Jay will detail this trend and its implications for gift planners, all fundraisers, and the charitable organizations they serve. The growing role of for-profit gift planners will also be examined. By the conclusion of this session, you will be aware of new frontiers for gift planning. You will know what today's practitioners must do to remain relevant and be successful now and in the future.</p>
9:00 - 9:10 am		Break

Morning Breakout Tracks		
Session 1		
9:10 - 10:10 am	Exhibits Open	<p>Leveraging Professional Resources to Create A Planned/Major Gifts Program Beth Kohler, Director of Development, Schoolcraft College Foundation</p> <p>We are all experiencing increased workloads and the pressure to bring in more gifts to help our institutions meet their missions. How do you ensure your database is sound, gain enough information about prospective donors to properly cultivate them, have enough knowledge to develop the right proposal, market yourself, AND get out of the office to actually meet with supporters? Learn how to increase your impact through strategic professional partnerships.</p>
9:10 - 10:10 am		<p>Bargain Sale: Just a Publicity Stunt? Michael Kateman, Executive Director, Development, Alumni and Public Relations, Columbia College</p> <p>A bargain sale can be a win-win for both the donor and the charity. Yet, this giving technique is often misunderstood, overlooked and underused - by both fundraisers and financial officers. This session will provide an overview of the bargain sale including data on the volume and value of bargain sales the past few years. In addition to discussing case studies, the presentation will include research on how top fundraisers from the <i>Chronicle of Philanthropy's</i> Philanthropy 400 utilize the technique in their gift planning program and campaign. Also discussed will be strategies for negotiations between donors, fundraisers and financial officers.</p>
9:10 - 10:10 am		<p>The Dynamics of Combining Major and Planned Gifts for Maximum Results Denise A. Fleckenstein, Director of Gift Planning/Endowment, United Way for Southeastern Michigan Arnold D'Ambrosio, Vice President for Alumni & Advancement, Northwood University</p> <p>Combining major and planned gifts can provide for the maximum benefit for the donor and the charitable organization. In this session, you will learn the step by step approach to cultivating and closing a bigger gift than you thought possible. This will be an interactive discussion inviting questions, stories of success and what might have been.</p>

		Session 2
10:20 - 11:20 am Room VT		<p>Charitable Giving: Gift Vehicles 101 Angelo J. Loumbas, Executive Director - Wealth Planning Director, Morgan Stanley Muata R. Mahluli, CFP®, CRPC®, Morgan Stanley</p> <p>Giving can help make the world a better place for ourselves, our children and future generations. Additionally, a well-structured charitable plan can provide benefits to the causes you care about for generations to come. This session will provide an introduction to different charitable giving strategies, including some of the financial and estate-planning issues associated with them.</p>
10:20 - 11:20 am Room		<p>When Nonprofits Combine: Legal, Board and Donor Issues Daniel J. Jenuwine, CFRE, Senior Consultant, Richner & Richner Jennifer M. Oertel, Partner, Jaffe Raitt Heuer & Weiss</p> <p>Non-profit organizations have three options to consider when deciding to combine their operations. All three put stress on stakeholders. This presentation will explain the difference between mergers, consolidations, and acquisitions; and share how charitable assets (CGAs, endowments, trusts, bequests) are treated in each case. It will then provide practical suggestions for setting board expectations and for keeping donors happy before, during, and after a combination.</p>
10:20 - 11:20 am Room		<p>Understanding Your Donors and How They Respond to Social Media, Email and Web Marketing Kristen Schultz Jaarda, JD, LLM, Executive Vice President, Crescendo Interactive</p> <p>Do you want to see whether your planned gifts online marketing measures up? What kind of online content generates responses for planned gifts? Do you want to gain greater insight into your donor's preferences and interests in planned giving information? How are your planned giving donors viewing your website, emails, and social media? The Planned Gifts Online Marketing Study contains the answer to these questions and more. This groundbreaking study analyzes the largest sample of online planned gifts marketing ever! Kristen will review the most effective strategies and best practices for email, web, and social media for planned gifts.</p>
		Session 3
11:30am - 12:30 pm Room		<p>Elements of A Successful Capital Campaign Nina Holden, CFRE, Vice President for Institutional Advancement, College for Creative Studies Gilda Hauser, Director of Campaigns & Major Gifts, College for Creative Studies</p> <p>This presentation will provide an overview and road map of how to plan for and execute a successful capital campaign. Topics will include feasibility study, institutional buy-in, developing a donor pyramid, recruiting the right campaign chair and committee, communication planning, donor cultivation, solicitations, recognition and stewardship.</p>
11:30am - 12:30 pm Room		<p>Fitting the Charitable Piece into the Estate Planning Puzzle: Planning and Drafting in the Post-Fiscal Cliff World Thomas H. Bergh, JD, LLM- Partner, Varnum, LLP</p> <ul style="list-style-type: none"> • Charitable Trusts to be funded in the future - "reduce to zero" lives on; • Using Charitable interests to limit the risk that family beneficiaries will morph into Paris Hilton; • Trading taxable dollars for non-taxable (or lower rate) interests; • Coupling Business Exit Strategies with Charitable Techniques
11:30am - 12:30 pm Room		<p>Creating A Culture of Philanthropy: Understanding Transformational Generosity Sam J. Kennedy, CFRE, Founding Partner, Strategic Partners, Inc. Judy M. Wernette, Managing Partner, Strategic Partners, Inc.</p> <p>Creating a Culture of Philanthropy is about more than just getting the next gift in the door. It's about walking hand in hand with your donors. It's about changing the way that you approach fundraising to fully engage the entire organization. It's about transformation- <i>Transformational Generosity</i> to be exact-both on the donor side of the table as well as on the organization's side. This presentation will help you determine whether you are operating in a transaction-environment or within a Culture of Philanthropy by identifying the differences and signs between the two. With that understanding you can guide your organization to provide 'transformational generosity' opportunities for your donors.</p>

12:30 - 1:10 pm		Italian Lunch Buffet (VT 500)
-----------------	--	----------------------------------

Thursday, June 05, 2014

		Afternoon Plenary (VT 500)
1:10 - 2:10 pm	Exhibits Open	<p>Trial & Heirs: Lessons From Celebrities to Increase Your Fundraising Efforts Danielle & Andy Moyoras, Trial & Heirs</p> <p>This session will teach you how to increase your efforts by:</p> <ul style="list-style-type: none"> • Using celebrity stories to engage your donors, turning the uncomfortable topic of estate planning into something entertaining • Sharing innovative ways to hook potential donors • Providing tools to help you have conversations in a fun, nonthreatening way • Teaching you how to incorporate these strategies into your everyday practices • Giving you creative and unique ways to kick-off a planned giving campaign
2:15 - 3:15 pm		<p>The Prudent Person’s Guide to Investing for Not for Profits! Heidi B. Jark, JD, Managing Director of the Foundation Office, Fifth Third Bank</p> <p>This presentation will outline the basics of modern day portfolio management as it relates to public charities and private family foundations. The goal of this presentation is to provide an understanding of investing for not for profits that serves many related parties, including those who work in the not for profit organizations (including but not limited to the finance and development teams, executive staff, and board of directors and committee members), but also to those who have made gifts to public charities and private foundations. The world of investments has become more “crowded” with options for investing. Many investors, seasoned and unseasoned, are wary or even uncomfortable with making investment selections in today’s world knowing that their decisions impact not only their organization and its future, but also their donors. Hopefully, after attending this session, everyone involved in investing for not for profits will have a greater comfort level with their process and decisions.</p>
3:20 - 4:20 pm		<p>Protecting Seniors and Their Money Peter A. Lichtenberg, PhD, ABPP, Director of The Institute of Gerontology, Wayne State University</p> <p>The challenges of protecting older adults from financial exploitation are enormous, particularly with the growing problem of older adults having cognitive difficulties being exploited. Over-protection, however, is not the answer. We created two new scales, a financial decision making rating scale and a financial decision making screening scale. In this presentation I will discuss our methods, items and case examples. We will review new knowledge about financial exploitation and financial capacity and provide practical approaches for the attendees to protect the older adults they work with.</p>
4:30 - 6:00 pm		<p>Partners Reception - Sponsored by Fifth Third Bank & Varnum, LLP Cultivate beneficial relationships and discuss topics of the day with fellow philanthropy professionals while enjoying hot Hors d’Oeuvres and a refreshing beverage.</p>
6 : 0 0 p m		Conference Ends

Plenary Speakers



Jay Steenhuisen, Steenhuisen Associates

Jay is the founder and president of Covenant Calls, LLC and sole owner of Steenhuisen Associates. He has consulted with numerous national non-profit and charitable organizations for more than 20 years - effectively refining and refocusing their gift planning, major gift, and marketing programs to meet the needs of donors at all wealth levels. His unique expertise in understanding, applying, and teaching the strategies and tactics that motivate philanthropic giving is based on his extensive work with major donors.

Jay is the chair-elect for the Partnership for Philanthropic Planning. He speaks regularly at fundraising conferences, is widely published, and is recognized as one of the leading major gift and gift planning experts in the country. Jay holds a BA from Seattle Pacific University, an MA in theological studies from Gordon Conwell Theological Seminary, and an MBA from Pepperdine University.



Danielle & Andy Mayoras, Trail & Heirs

Nationally-known legacy expert attorneys and husband and wife duo, Danielle & Andy Mayoras, combine combative celebrity estate cases and famous courtroom clashes with common sense advice to help people avoid their own costly inheritance catastrophes. In this presentation, Danielle & Andy Mayoras share the estate stories of celebrities such as Michael Jackson, Whitney Houston, Princess Diana, Sonny Bono, Marlon Brando, and James Brown, among many others.

Danielle & Andy Mayoras are co-authors of Trial & Heirs: Famous Fortune Fights!, hosts of the national television special, Trial & Heirs: Protect Your Family Fortune!, and regular contributor for Forbes. Danielle & Andy are respected media resources and have lent their expertise and analysis to hundreds of media sources, including The Associated Press, Los Angeles Times, Vanity Fair, Kiplinger, and The Washington Post, among many others.



Heidi Jark, JD, Foundation Office, Fifth Third Bank

Heidi B. Jark, Managing Director of the Foundation Office at Fifth Third Bank, oversees the administration of corporate and family foundations throughout the Bancorp. She has been with Fifth Third since 1999 and previously served as its Planned Giving Manager.

Prior to joining Fifth Third Bank, Ms. Jark served as the Planned Giving Director for Valparaiso University, assisting donors in estate and charitable gift planning. Ms. Jark also practiced law in Valparaiso, Indiana with the firm of Hoepfner, Wagner & Evans concentrating her work in the areas of litigation and appellate brief writing. She has a B.A. in Political Science from Valparaiso University and a J.D. from its School of Law.

Ms. Jark is very active in the community having served in the past as President of the Greater Cincinnati Planned Giving Council, the American Cancer Society Board of Directors for Hamilton County, the WAVE Foundation, and Ohio Grantmakers Forum, and on the National Board for the Partnership for Philanthropic Planning.



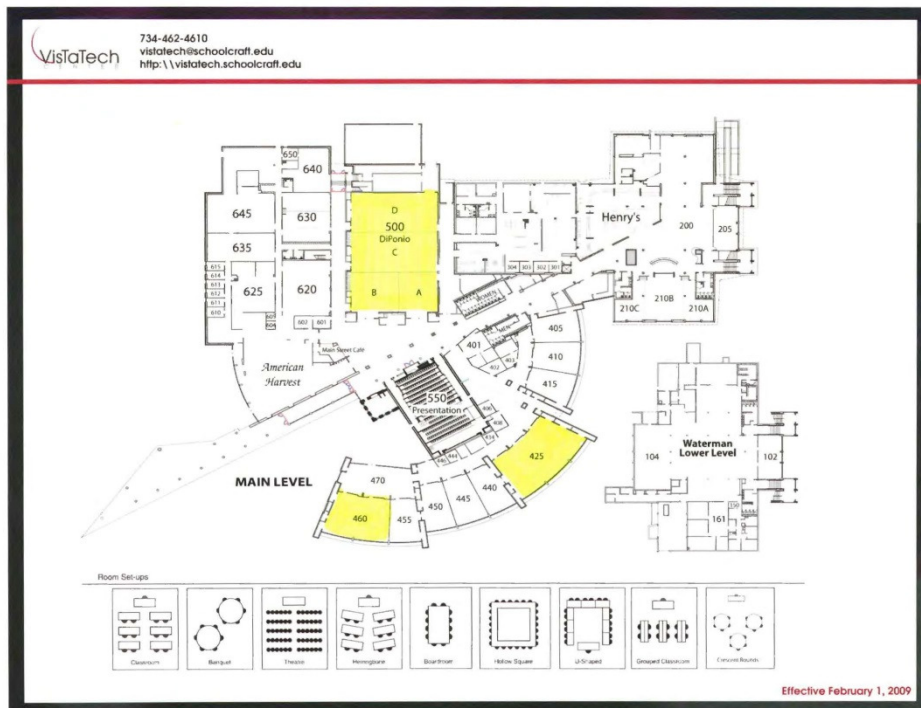
Peter Lichtenberg, PhD

Institute of Gerontology, Wayne State University

Peter A. Lichtenberg, Ph.D., ABPP is the Director of The Institute of Gerontology and the Merrill Palmer Skillman Institute. He is also a Professor of Psychology at Wayne State University. He received his bachelor's degree from Washington University in St. Louis, and his Master's and doctorate in Clinical Psychology from Purdue University.

Dr. Lichtenberg is active in his research on issues related to capacity assessment, late life depression, minority health and aging, dementia and disability. He has written three books and edited three more and has over 150 peer reviewed publications. He recently completed the creation of the Lichtenberg Financial Decision Making Rating Scale, a tool to be used to assess major financial decisions and/or transactions of older adults.

Conference Center Location and Floor Plan



VisTaTech Location at Schoolcraft College

VisTaTech Center
Schoolcraft College
18600 Haggerty Rd
Livonia, MI 48152

Direction Information

- Free parking is available in Schoolcraft College's North Parking Lot
- Easy access from major expressways, including I-275, M-14, and I-96.
- 25 minutes to Detroit Metropolitan Airport.

Registration

2014 LEAVE A LEGACY PARTNER: \$25

Note: Nonprofit partners can register up to 3 people at the discounted rate!

PGRTSEM Member: \$75

Guest: \$100

Reception-only: \$15

Details, details, details...

Invest just one day and get a year's worth of the insight and advice you need to create your plan for success. You'll hear from top national and regional experts about "what works" and how that will benefit your organization, your donors/clients, and your career.

Track Descriptions:

Practical: These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better.

Advanced: These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning.

Development Track: These sessions may be best for those working with annual/major donors and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

Register early: Online registration is available on the website. www.plannedgivingroundtable.org. You will be invoiced for the registration fee.

Cancellation Policy: A \$25 fee will be charged for all cancellations received in writing by May 23rd. After May 23rd, there will be no refunds.

Continuing Education: CFRE™ has been applied for by the committee.

Valuable Connections: Multiple opportunities to make valuable connections and learn from more than 180 of your gift planning colleagues.

Customized Experience: Whether you are new, wanting a refresher, or needing technical expertise, you can customize your experience in the sessions to get what you need the most.

A fabulous venue with free parking!

Gold & Silver Sponsors



Comerica Charitable Trust

Bronze Sponsors



Reception Sponsors



Exhibitors



In Kind Sponsors

