

October 10, in Greencastle 11am—2pm
“Telling Your Story & Evaluating Input:
Presenter: Jennifer Pendleton

Every one of us is distracted by messages coming in from many different channels. How does your organization tell its story and ensure your donors (or prospective donors) understand why they should invest in your organization? This interactive workshop will focus on building (or remodeling) your case for support. We'll explore the importance of a case for support and how to use it to support your annual fund, capital campaign and major gift efforts. We'll share examples and encourage you to bring your own to share. You'll leave this session with a checklist of resources and the inspiration to create your own case for support.

November 14 in Greencastle 11am-2pm
“How to Make the Ask & be Held Accountable for Success: Boards in Fundraising”
Presenter: Aly Sterling

Philanthropy begins at home with those closest to the organization – the board, staff and volunteers. After all, how can we ask the community to invest in the organization when those closest to it haven't been given the opportunity? At the same time, over half of all board chairs and executive directors identify philanthropy as one of the most important areas for board improvement! This dynamic workshop is designed to motivate and inspire, and will provide principles of fundraising that can be immediately personalized and applied by board members. Helping board members identify the fundraising strategies that they're comfortable deploying will create a culture of philanthropy in your organization – a culture that paves the way to long-term fundraising sustainability.

Sterling is Founder & President of Aly Sterling Philanthropy based in Toledo, Ohio.

Information

- **All 8 workshops - only \$100**, if registered and paid by February 7, 2017
- One Workshop - \$25 per person at the door ; \$15 if registered and paid one week in advance
- Payment due at time of registration
- Lunch is included

Locations

(Feb., Mar., April, and May)

Crawfordsville Country Club
3272 W Country Club Rd
Crawfordsville, IN 47933

(Aug., Sept., Oct., and Nov.)

The Inn at DePauw
2 W. Seminary St.
Greencastle, IN 46135

To Register

Crawfordsville Workshops

Registration information available at
www.mccf-in.org/grants
or call 765.362.1267

Greencastle Workshops

Registration information available at
www.pcfoundation.org
or call 765.653.4978

2017 Nonprofit Learning Series

Presented by

**Montgomery County
Community Foundation
&
Putnam County
Community Foundation**



*Montgomery County
workshops are also
sponsored by Hoosier
Heartland State Bank*



Hoosier Heartland Financial Services

February 14 in Crawfordsville 11am-2 pm
“Boards that Rock: Board Building for 2017”
Presenter: Susan Decker

Board building starts with a strong understanding of what your organization needs. When you know the skills and abilities you need to lead, board recruitment and cultivation becomes a process of engagement. This workshop will introduce you to board building as a year-long process that engages the entire board. You will also learn about best practices for good governance and board leadership. 2017 can be your year for better board leadership!

Susan serves as a senior governance consultant for BoardSource in Washington D.C. She is also the Director of the Master of Leadership Development program at Saint Mary-of-the-Woods College.

March 14 in Crawfordsville 11am-2pm
“The Annual Appeal: Year Round Donor Engagement”
Presenter: Adam Clevenger

A leader in philanthropic education and leadership, Hank Rosso, once wrote, “Fundraising is the gentle art of teaching the joy of giving.” When was the last time your donors felt joy by giving to your organization? National statistics suggest that 4 out of 5 new donors will not make a second gift...that’s not much joy.

Adam Clevenger, CFRE, a Senior Associate with Loring, Sternberg & Associates will lead a session focusing on engaging your donors to build strong and joy-filled relationships. Successful donor engagement often begins with annual giving. This session will review successful strategies in annual giving, donor communication, and stewardship.

April 11 in Crawfordsville 11am-2pm
“Legal Obligations of Boards and Maintaining Ethical Integrity”
Presenter: Phil Purcell

Legal Obligations of Boards and Maintaining Ethical Integrity: This interactive seminar will explain the three basic legal duties of a nonprofit board of directors and how a board may fulfill these duties. First, the legal duty of care requires a board to exercise prudent care in its decision-making. Second, the legal duty of loyalty demands that board members put the interests of the organization above their personal interests. We will discuss how this legal duty is fulfilled by implementing a conflict of interest policy and procedure as well as a statement of ethics for the organization. Finally, we will examine the legal duty of obedience by looking at the role of bylaws, articles and compliance with the law of federal tax exemption. Questions and discussion will be encouraged.

Purcell serves as Vice-President for Planned Giving and Endowment Stewardship at Ball State University Foundation.

May 9 in Crawfordsville 11 am-2pm
“Engaging Millennials to Serve and Give”
Presenter: Dr. Amy Thayer

This session is a primer for connecting with this digital generation. It explores how individuals think, act and give to causes today and what the future holds in this new era of impulse cause work activities. Based on Achieve’s years of research for The Millennial Impact Project, this presentation will transform your thinking about how and why those in their 20s and 30s participate in cause work – and how to involve them in yours.

As Achieve’s Director of Research, Amy is responsible for identifying and devising appropriate methodologies and data collection strategies for projects like the Millennial impact Report and the Millennial Running Study.

August 8 in Greencastle 11am– 2pm
“Strategic Planning”
Presenter: Mike Stone

Anchor Strategy: Preparing for the Unexpected. The purpose of this workshop is to help nonprofits become better able to cope with continual change and uncertainty by equipping them with an “anchor strategy”, comprised of three core elements of nonprofit strategy.

- The Core, which defines what we do, for whom, and why
- The Strategy Driver, which determines what business we are in and
- The Strategy Boundaries, which determines what we will not do

Stone founded Impact Strategies, Inc. in 2005 to work exclusively with nonprofit organizations. He has a Ph.D. from Michigan State University in Higher, Adult, and Lifelong Education.

September 12 in Greencastle 11am-2pm
“Financial Best Practices & Essential Policies”
Presenter: Melanie Lockwood Herman

Financial management and fiscal oversight are important functions at every nonprofit. This workshop will provide a simple framework for each function, and practical tips for adopting a ‘best practice’ approach in both areas. The session will continue with examples of practices and policies that have been tailored to suit organizations with varying missions, scopes, and even workplace cultures. Learn how to improve fiscal reporting, boost oversight committee engagement, and simplify your policies to steward the financial health of your nonprofit

In a world fraught with danger, it is comforting to know that Melanie is holding on tight to the handlebars of the Nonprofit Risk Management Center. She earned a BA in Urban Affairs from American University and a Juris Doctor from George Mason University.



2017 NON-PROFIT LEARNING SERIES REGISTRATION FORM



Last Name		First Name	
Organization Name		Position/Title	
Address			
City		State	Zip
Phone		Email	

Cost:

\$100.00 / Person / Series if registered Feb. 7, 2017

\$15.00 / Person / Workshop in advance

\$25.00 / Person / Workshop at the door

TO REGISTER:

Please check the workshops you would like to attend and then mail your completed form with check to:
Montgomery County Community Foundation
P.O. Box 334, Crawfordsville, IN 47933
765.362.1267

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