



September 30 – October 2, 2018

Center City Philadelphia, Pennsylvania

Friends Center & Sheraton Philadelphia Downtown Hotel
(Hotel Discount for Conference Attendees)

PROGRAM

The Gathering sessions follow three interest-focused pathways for ease of reference. All sessions carry at least one designation and some have multiple appeal. Gathering participants are welcome to attend any of the sessions and are not required to keep to a single “path”.

- **FRNQ: *Fundraisers New to Quakerism*** sessions focus on those issues that are unique to Quaker organizations and are designed to provide insight for those that have recently joined a development team or want to know more about why certain aspects of development are affected by Quaker values and testimonies.
- **MMM: *Monthly Meeting Members*** sessions are specifically designed to support the efforts of those raising funds on behalf of a monthly meeting. These sessions, depending on the content, may also be appropriate for anyone new to development work.
- **SFR: *Seasoned Fundraisers*** sessions delve into more advanced forms of giving and strategies that may require a larger team to implement.

Sunday, September 30

2:30 – 5:30 PM Registration

3:00 – 4:30 PM Pre-session

Quakers New to Fundraising/Fundraisers New to Quakerism

(●MMM & ●FRNQ)

Drew Smith, Friends Council on Education
Martin Ogletree, Newtown Friends Meeting

A session designed for both monthly meeting volunteers and fundraisers who are new to a Quaker setting. The group will spend time as a whole and in a focus specific session during which seasoned Quakers will learn about growth in membership and how Quakers can gain comfort and skill when discussing money. Those who are new to Quakerism will be shepherded by the Executive Director of Friends Council on Education through the nuances of Quaker pace and process in the break-out session. The group will rejoin as a whole to share insights and reflections.

5:30 – 6:30 PM Reception with cash bar

Join friends and connect with new colleagues at the opening of the Gathering. The reception and dinner are the first opportunities for peer networking with other Quaker fundraisers.

6:30 – 8:30 PM Dinner & Keynote at the Sheraton

Keynote: *Quaker Fundraising in Uncertain Times.*

Diane Randall is the Executive Secretary of the Friends Committee on National Legislation (“FCNL”). Diane leads FCNL’s staff to effectively educate and lobby for the policies and legislative priorities established by FCNL’s General Committee. A lifelong advocate for peace and social justice, Diane is a fierce proponent for citizen engagement that advances policies and practices to create a better society for all.

Diane came to FCNL in March, 2011 as the fourth Executive Secretary. Diane has led FCNL’s program expansion, including adding lobbyists and new programs to engage grassroots citizens, young adults, and more Quakers to lobby for peace, justice, and a sustainable planet. Diane travels widely on behalf of FCNL and represents a voice for Quaker advocacy in Washington on the Hill, within the faith community, in media, and throughout the United States.

Diane is a convinced Friend, and a member of Hartford Monthly Meeting, New England Yearly Meeting. Diane currently worships with Langley Hill Friends in Baltimore Yearly Meeting, and she relishes worshipping with Friends across the country while traveling for FCNL. She serves on the Corporation of Haverford College. She previously served on the Sidwell Friends School Board of Trustees, the Board of Advisors of the Earlham School of Religion, the Connecticut Housing Finance Authority Board, the Connecticut Public Defender Services Commission and the West Hartford Board of Education. Diane graduated from the University of Nebraska with a B.S in Education.

Monday, October 1

7:30-8:30 AM Breakfast

8:30-9:15 AM Worship & Introductions

9:30 – 10:45 AM Session I

Plenary Panel: Growing the Vitality of the Quaker Community through Philanthropy

Panel members: Joe Evans, Beth Henricks, Tom Hoopes, Jeff Markovitz, Parker Snowe, and John Gilliland
Moderated by Robin Mohr, Friends World Committee for Consultation

Many have contemplated the current state of Quaker organizations and meetings and pondered whether there is a way to better support the vitality of these entities. Members of the panel will share philanthropic strategies that they have engaged in that include collaboration among organizations, growth focused grant-making, and techniques to increase membership and donor base and the impact those have had on the vitality of the Quaker community.

11:00 – 12:15 PM Session II

Nuts & Bolts for Monthly Meetings

(MMM)

John Merrill, Margaret Allen, Lynn Jordon, Sandi Morton, Rebecca Snyder, and David Macfarlane,
Stony Run Friends Meeting Members

The fundraising efforts of most monthly meetings are supported by volunteers who may or may not have a background in development. This session will focus on those pieces that are essential to have in place when raising funds on behalf of your meeting. Topics covered will include: how to ask for money, gift acceptance policies, minuting a gift, acknowledging a donation, and record keeping.

Leadership's Role in Raising Funds

(SFR & FRNQ)

Chad O'Kane, Wilmington Friends School
Pam Leland, The Hickman

An organization's leaders are often overlooked and underused in a fundraising capacity. Executive directors, heads of school, board members and general secretaries all have an integral role to play in development efforts. Thinking creatively about how and when to engage these team members can result in more meaningful and successful interactions with donors and potential donors.

The Q'uniqueness of Friends Fundraising

(FRNQ & SFR)

Maani Waldor, Greene Street Friends School
Matt Jackson, Friends School Haverford

Those conversations that only take place within the walls of Quaker organizations: auctions without alcohol, giving levels as taboo, and "to name or not to name", to name a few! The session will be led by development professionals who pondered these same questions as they joined their Quaker community and who will share continuing revelation around these issues.

12:15 – 1:15 PM Lunch

1:15 – 2:45 PM Plenary Session: Ethical Principles as a Guide Path to Excellence
Robbe Healey, Aurora Philanthropic Consulting

Are ethics a road block or a glide path to excellence? Charity scandals make sensational global headlines. A misstep in your community – or across the continent can cast a pall on the entire sector. The cry goes out; someone should do something! The damaging impact can endure for decades.

Dr. Paul Pribbenow, ethics expert, reminds us, "The Code of Ethics sometimes seems like this black-and-white document sent from on high, but the reality is, it's a living document that represents just the floor for ethical behavior. The key is for us to slow down and think through the sort of lives we want to live, our moral values, the ethical situation we face, and then to encourage discussion about our professional moral lives."

This session will challenge you to think critically about how you incorporate ethics, ethical practice, and ethical culture into your daily work ... as a personal and organizational glide path to excellence.

3:00 – 4:30 PM Session III

Planned Giving 101

(MMM)

Mimi Blackwell, Friends Fiduciary Corporation

Planned Giving 101 will focus on the most donor-friendly deferred gift vehicles, the bequest and the charitable gift annuity. The session will also review the benefits of gifts of appreciated securities. Learn why a planned giving program is an important fundraising tool for organizations of every size and how to get started.

Break on Through: Looking at Philanthropy from the Donor's Perspective

(SFR & FRNQ)

Gail Connerley, Earlham College

Mary Ellen McNish

Ken Hellendall

Understanding a donor's motivation and safeguarding their intent is critical to effective fundraising. Hear first-hand from donors to Quaker organizations and gain insight into building effective relationships and meaningful asks. Also, learn from the experience of others, what didn't work and why.

Best Practices Panel

(FRNQ & SFR)

Andrea McCabe, Foulkeways at Gwynedd, Barbara Monahan, FCNL, Diane Mallery, Germantown Friends School, and Ann Venable, Baltimore Yearly Meeting

This panel will span the various forms of giving--annual, planned, major and capital gifts—and highlight the thinking and practices across a spectrum of Quaker entities including, schools, continuing care retirement communities, organizations and yearly meetings. The purpose of the session is to discuss best practices within several different organizations to hone skills and share ideas.

Tuesday, October 2**7:30-8:30 AM Breakfast****8:30-9:00 AM Worship****9:00 – 10:15 AM Session III*****Tax Cuts and Job Act for Fundraisers***

(MMM, SFR & FRNQ)

Mike Valoris, PG Calc

The new tax law, effective January 1, 2018, should have all fundraisers re-evaluating how they discuss charitable giving with donors. Donors may lack understanding about charitable giving in this new tax environment and may believe that they should curtail their gifts to your organization. The good news is there are still ways for fundraisers to make a compelling case for philanthropy. Fundraisers will learn how to address charitable giving under the new laws, ways donors can give and still have tax advantages, and strategies for giving that donors may not have considered in the past.

Planned Giving 201

(MMM, SFR & FRNQ)

Lynne Ierardi, University of Pennsylvania

Some planned gifts only make sense when a larger donation is being contemplated. Learn more about less common vehicles such as charitable remainder trusts, charitable lead trusts, pooled life income funds, and donor advised funds and when they may be appropriate for a donor and an organization. *Planned Giving 101* is not a prerequisite for this session.

10:30 – 11:45 AM Session IV***Social Media and Storytelling***

(SFR & FRNQ)

Karl Vela, Westtown School

Effectively expressing the mission of your organization through the sharing of donor stories and the impact of philanthropy is a tremendously powerful tool. As digital platforms multiply and grow, many questions and opportunities arise. This session will delve into the various platforms for storytelling to promote a campaign, discuss why they are important to implement, and model how to craft compelling communications that will inspire your supporters to give.

Rallying Techniques

(MMM & FRNQ)

Betsy Torg, Friends Council on Education

Jack Rogers, William Penn Charter School

In addition to all of the obligatory items on a development team's calendar there are always those "extras" that need to be woven into the existing structure. This session will take a deeper dive into fundraising strategies such as matching challenges, celebrating an organizational milestone, and auctions. Discussion will focus on the best times to pursue these extras and how to effectively incorporate them into your established fundraising plan.

Educating Your Quaker Community about Giving

(FRNQ & SFR)

Marci Roberts, Richmond Friends School

Marlene Sloger, San Francisco Friends School

Schools are terrific at educating students, but what about educating parents on the importance of giving? Before making an ask, consider how you teach your community about why and how their gift might be important. This session will focus on building a culture of giving within your community by helping all members understand and embrace the need to support Quaker organizations.

11:45 – 12:00 PM Farewell & Box Lunch Pickup