

# REGISTRATION FORM

Philanthropy Day • November 5, 2008

7:30 a.m. - 2:00 p.m.

The Resort and Conference Center at Hyannis  
35 Scudder Avenue (West End Rotary) Hyannis, MA

Seminars and Luncheon \$50

PGCCC/EPCC Members \$30

I'm a member of \_\_\_\_\_ PGCCC \_\_\_\_\_ EPCC

\_\_\_\_\_ Attendee(s) Seminars and Luncheon @ \$50 ea. = \$ \_\_\_\_\_

\_\_\_\_\_ Attendee(s) PGCCC/EPCC Members @ \$30 ea. = \$ \_\_\_\_\_

\_\_\_\_\_ Table for ten @ \$500 ea. = \$ \_\_\_\_\_

*Names of all table guests are needed in advance, please email:  
mwhite@capecodfoundation.org or call (508)790-3040*

## Registration Information

Name: \_\_\_\_\_

Company or  
Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

**Payment** Return form & payment (checks payable) to:

**PGCCC, 259 Willow Street, Yarmouthport, MA 02675**

\_\_\_\_ Visa \_\_\_\_ MasterCard \_\_\_\_ American Express \_\_\_\_ Discover

Card # \_\_\_\_\_

Name on Card: \_\_\_\_\_

Exp. Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ Zip Code associated with card \_\_\_\_\_

*If you cannot attend for financial reasons, please contact  
Jason Lilly at (508) 420-1742 or Jason.Lilly@rocklandtrust.com*

*If you have dietary restrictions, please indicate below or email  
philanthropyday@capecodgiving.org*

**Registration Deadline: November 1, 2008**

**(508) 790-3040**

**www.capecodgiving.org**



NON-PROFIT ORG.  
U.S. POSTAGE  
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Planned Giving Council of Cape Cod  
259 Willow Street  
Yarmouthport, MA 02675

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THANKS TO**



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*Community Underwriter*

We look forward to seeing you at  
Philanthropy Day on Cape Cod 2008  
To register, go to [www.capecodgiving.org](http://www.capecodgiving.org)  
and click on *Philanthropy Day*.

**Remember**  
Deadline for Registration is November 1<sup>st</sup>



2008  
PHILANTHROPY DAY  
ON CAPE COD



*The Resort & Conference Center  
at Hyannis*

35 Scudder Avenue  
(West End Rotary)  
Hyannis, MA



Philanthropy Day on Cape Cod, now in its 12<sup>th</sup> year, is organized by the Planned Giving Council of Cape Cod and a volunteer planning committee. Attendees are Cape Cod and Island professionals in nonprofit organizations of all types and sizes, their volunteers, board members, as well as professional advisors such as attorneys, estate planners, financial planners, and others.

## 7:30 a.m. REGISTRATION

Start your day off with continental breakfast, tea, or coffee. Visit the sponsors and exhibitors.

## 8:00-8:45 a.m. ROUNDTABLES

Moderator: **Christiane Perry**, *Director of Marketing and Membership Services, Lower Cape Cod Community Development Corporation (CDC)*



**Tax Laws and Impact**  
**Brooks Thayer**, *Attorney-at-Law*  
*LaTanzi, Spaulding & Landreth, P.C.*

**Prospect Research**  
**Dave Chase**, *President, Chase Solutions*

**Grant Writing**  
**Alice Boyd**, *Owner, Bailey Boyd Associates*

**Databases**  
**Pat Weaver**, *Business Development Manager*  
*Mission Research / Giftworks*

**Special Events**  
**Bobbi Mersereau**, *Manager of Donor Relations*  
*Cape Cod Healthcare Foundation*

**Planned Giving**  
**Charlie Case, Jr.**, *Attorney-at-Law, Principal*

**Social Networking**  
**Beth Dunn**, *Director of Communications and Technology*  
*Arts Foundation of Cape Cod*

**Direct Mail**  
**Maura Szendey**, *Sr. Director, SCA Direct*

**Fundraising Videos**  
**Amy Davies**, *Production Services Coordinator,*  
*Cape Cod Community Media Center*

**Planned Giving Calculations**  
**Gary Pforzheimer**, *President, PG Calc*

**Collaboration**  
**Richard Brothers**, *Executive Director, Cape and Islands United Way*

**Organizational Development & Leadership Coaching**  
**Janice Kinder**, *Workplace Coach*

## 9:00 – 10:15 a.m. MORNING SESSIONS I

### Fundraising 101

Moderator/Speaker: **E. Peter Dubay**, *FAHP, Director of Development, Riverview School*  
This will be a lively, interactive session that will be based on the expressed needs of the participants and will draw upon the experience of the presenter and participants in attendance. We will cover the basics of: Annual Appeals, Special Events, Prospect Research, Capital Campaigns, Moves Management, and Planned Giving.

### Board Development

Moderator: **Karen Billard**, *President, Kusala Design*  
Speakers: **Herbert P. Dane**, *President & Founder, The Dane Group*  
**Janette H. Emlen**, *Vice President, The Dane Group*

This session will be a discussion of the importance of Boards of Trustees: how to build or improve your board, how to choose trustees, how to get the most from your trustees, what trustees' roles are. The session will provide opportunities for questions, comments, and examples from the audience.

### Attracting, Managing, and Keeping Volunteers

Moderator: **Natalie DuBois**, *Director of Development*  
*Cape Cod Community College Education Foundation*  
Speakers: **Mary Carchrie-Feltus**, *Director, Sr. Services Corp, Elder Services*  
**Hilary Greene**, *Volunteer Coordinator, Habitat for Humanity of Cape Cod*  
**Robin Carroll**, *Director of Human Needs, Lower Cape Outreach Council*  
**Jill Talladay**, *Founder and Chairperson, Single Volunteers of Cape Cod*

This interactive panel session will cover all aspects of volunteers including where and how to recruit them, management techniques, as well as training and motivating these ambassadors to serve the mission of your organization.

### Why Your Great Cause Alone Is No Longer Enough

Moderator/Speaker: **Patricia Janiak**, *Director of Development, Cape Abilities*  
Speakers: **Laura Kurzrok**, *Executive Director, Eastern Bank Charitable Foundation*  
**Charlie Case, Jr.**, *Attorney-at-Law, Principal*  
**Gary Sheehan**, *President/CEO, Cape Medical Supply*  
**Mike Robinson**, *Vice President, Rogers and Gray Insurance*

This session will address how today's donors look at giving to nonprofits almost like researching personal investment options: What do we do with the funds? How do we manage our resources and their investment? Donors are doing their homework. Are you ready? Hear perspectives from a nonprofit, a funder, an advisor and the next generation of donors.

*All sessions are expected to be available on-line to attendees after the event. The event committee reserves the right to change or modify the program of activities should the need arise.*

## 10:45 – 12:00 NOON MORNING SESSIONS II

### Fundraising 101

Moderator/Speaker: **E. Peter Dubay**, *FAHP, Director of Development, Riverview School*  
This session will be a repeat of the first morning session.

### Direct Marketing – the Good, the Bad, and the Ugly

Moderator/Speaker: **Maura Szendey**, *Sr. Director, SCA Direct*  
Speaker: **Dom Spinosa**, *Creative Director, SCA Direct*

This session will be an overview of Direct Marketing as a fundraising medium with some examples of how it has worked effectively, and not so effectively, to broaden Annual Giving, Planned Giving, and mid-level giving efforts.

### Moving Your Prospects From Cold to Hot

Moderator: **Karen Bissonnette**, *CFRE, Chief Development Officer*  
*Community Health Center of Cape Cod*  
Speaker: **Nancy Simpson Banker**, *FAHP, Senior Consultant, Copley Harris*  
“Moves Management” is the term used to describe the process of engaging prospects in your organization. This session will demystify moves management and provide participants with a tool kit to help turn your prospects into donors.

### Family Dynamics / Generational Giving

Moderator: **Christopher J. Deluga**, *Vice President,*  
*BNY Mellon Wealth Management*  
Speaker: **Thomas C. Rogerson**, *Director of Family Wealth Services,*  
*BNY Mellon Wealth Management*

Aimed at executives and board members of universities, hospitals, and nonprofit organizations with donors. Individuals and families who are philanthropic, attorneys and clients who are charitably inclined. This session will cover: effects of family dynamics on wealth decisions, how to use philanthropy to prepare future generations to receive wealth, increase the size of gifts made by your major donors.

## 12:15 - 2:00 p.m. LUNCHEON & AWARDS

Each year the Planned Giving Council celebrates the dedication and generosity of support for nonprofit organizations on Cape Cod and the Islands with annual distinguished service awards in the following categories:



- Outstanding Philanthropist**
- Outstanding Volunteer**
- Outstanding Business/Organization**

*Co-chairs, Jason Lilly, Rockland Trust, and Erica Waasdorp, A Direct Solution and Planned Giving Council President, Deborah Baker, Development Solutions of New England, would like to thank all sponsors, committee members, volunteers, and attendees for making this year a success!*