



2021 Edge Conference

Monday, November 8, 12:00-3:00 pm: Virtual
Tuesday, November 9, 10:00-10:45 am webinar and 12:00-6:30 pm: On-site
Capital One Hall in Tyson's Corner (McLean Metro/\$10 Parking)
Wednesday, November 10, 2021, 1:00-6:00 pm: Virtual

2021 Sponsors & Partners



2021 Schedule of Events

All-Virtual Program for Monday, November 8, 2021

12:00-12:45 ET, virtual: **How to Ask for an Estate Gift without Fear or Anxiety**

Speaker: Russell James III, Ph.D., J.D., CFP®, Professor/The CH Foundation Chair of Personal Financial Planning/Charitable Giving Program Director at Texas Tech University

The idea of legacy gift fundraising makes sense. But it feels a little uncomfortable, right? So how do we actually DO this? What, specifically, do we say? In this session Professor James reviews, step-by-step, the most effective ways to ask for an estate gift for your nonprofit. Connecting experimental research and academic theory with dozens of simple, practical examples, this presentation gives you both the “Why” and the “How” of the words and phrases you will want to use.

1:00-1:45 ET, virtual: **Tips to Prepare Your Website for Cryptocurrency Donations**

Speakers: Dan Jasker, Director, Digital Services and Drew Navolio, Vice President, Client Services, David James Group

Cryptocurrency is a hot topic in the association world as a payment option for membership dues and, more importantly, donations. Of course, we've all heard of cryptocurrency, but what is a cryptocurrency, and how does it work? It seems clear that cryptocurrency is confusing to many people, and such terms as mining, bitcoin, dogecoin, or a crypto wallet sound like gibberish. Let's start with the basics and then dive into cryptocurrency further with a few tips to implement on your website to make it easy for donors who opt to use this payment type.

2:00-2:30 ET, virtual: **Building Grants into Your Fundraising Portfolio**

Speakers: Rachel Werner, MPA, PMP, GPC, CEO, RBW Strategy and Ebony S. Clay, PMP, Senior Manager, Programs and Development, AMCP Foundation

How should association foundations decide the best approaches to raise money given all the recent changes brought about COVID-19? Have you had to pivot your programming, operations, and/or fundraising portfolio? While the grant prospecting, planning, and writing process is new to some, for many association foundations, this is part of their annual fundraising portfolio. Association foundations are not traditional nonprofits, so there are some nuances that need to be identified and analyzed in relation to grant seeking. Actual case studies in association foundations will be used to provide value and clarity on how this can work for your own entity.

2:30-3:00 ET, virtual: **Legal Brief: New Fundraising Issues, Shifting Regulator Priorities, and Compliance Considerations**

Speaker: Cristina I. Vessels, Associate, Venable LLP

Straight from external counsel, a recap of what every association executive needs to know about the latest industry developments in charitable fundraising. Join us for an updated primer on charitable registration requirements, followed by new fundraising issues, shifting regulator priorities, and compliance considerations.

Hybrid Program for Tuesday, November 9, 2021

10:00-10:45 AM ET, virtual: **Strategies for Mutually Beneficial Corporate Partnerships**

Speaker: P Joanne Ray, Principal, Consultants in Association Philanthropy

You are tasked with growing corporate donations and sponsorships for your association and foundation. How do you grow beyond the same 5-10 companies that you count on year-in and year-out? Be inspired to think beyond traditional corporate sponsorship and donor giving opportunities, benefits packages and recognition. Learn practical examples to apply to your next corporate partner meeting.

1:15-1:45 PM ET, in-person: **Major Gifts in a Post-Pandemic World**

Speaker: Conan N. Louis, BS, MS, JD, President, CNL Solutions

Fueled by Major Gifts, Individual Giving traditionally constitutes the lion's share of private fundraising nationally, in some years accounting for more than 80% of all dollars raised. Due to the pandemic, 2020 saw the proportion of individual giving fall to an all-time low of 69%. Despite this drop, Individual Giving remains an area of opportunity for AFG members, who generate only 32% of their total dollars from individual donors, as reflected in the 2021 AFG Benchmarking Report. This 30-minute session will explore the What, Why, and How of Major Gifts, as organizations emerge from the pandemic.

2:00-2:45 PM ET, in-person: **Lessons on Excelling Professionally from America's Best Fundraisers – Keynote**

Speaker: Holly Hall, Contributing Editor, Inside Philanthropy

After decades of writing about fundraising and profiling many of the nation's leading fundraisers, Holly Hall has delved into what propels success in this challenging but rewarding profession. Learn about the secret sauce that the nation's top development professionals have used to achieve record fundraising results for their organizations.

Journalist Holly Hall has been covering fundraising since the late 1980s. She holds a master's degree in Philanthropy and Development from Saint Mary's University of Minnesota and has worked at nonprofits including the American Red Cross where she created *The Humanitarian*, an award-winning quarterly magazine.

3:00-3:45 PM ET, in-person: **Annual Giving, Planning for Year-End**

Speaker: Douglas H. London, Executive Vice President, CCS Fundraising

An effective annual giving program is necessary for successful and sustainable fundraising for all foundations. Join us for a presentation to learn about best practices for annual giving requests and marketing materials, donor communication and follow up, donor segmentation and targeted requests, volunteer, and board engagement, and thanking your donors. Attendees will: understand current trends in annual giving; receive recommendations for how to think about annual giving within a balanced fundraising model; and learn strategies for developing and implementing annual giving program best practices.

3:45-4:15 PM ET, in-person: **Five Questions to Optimize Data Management within Your Foundation**

Speaker: Wes Trochil, Founder, Effective Database Management

Whether your data management system is brand new or many years old, there are steps you can take to get the most from it. Here are five questions you should be considering at your organization in order to improve the value and usefulness of your current system and data. You'll hear specific, real-world examples of actions other non-profits have taken to clean up their data, improve the use of their data management systems, and improve fundraising effectiveness.

4:30-5:30 PM ET, in-person: **LEADERSHIP: Disruption, Risk, and Opportunity – Closing Keynote**

Speaker: Shawn Boynes, FASAE, CAE, Executive Director, American Association for Anatomy

Followed by networking happy hour

Are you prepared to lead successfully through the *next* disruption? How can you positively influence teams – internally and externally – when everything has changed? Our closing keynote speaker will provide insights into the thought patterns of truly innovative leaders. Effective leaders craft opportunity from disruption. Honest leaders acknowledge social justice issues and address impact on their organizations. Successful leaders are preparing *now* for the new normal.

With 25 years of experience in the association sector, Shawn Boynes spent the greater part of his career passionately serving in the education and professional development space. A past member of the Board of Directors of the American Society of Association Executives (ASAE), Shawn currently chairs the ASAE Fellows Program and is a graduate of Howard University. He is also a co-host of the recently launched Texts to Table podcast, which focuses on conversations around race and leadership.

All-Virtual Program for Wednesday, November 10

1:00-1:45 PM ET, virtual: **Leading through Change: Charting a Course for Philanthropy**

Speakers: Natalie Zundel, CFRE, Owner, Raise Well and Melanie Dolechek, CAE, Executive Director, Society for Scholarly Publishing

2020 brought seismic shifts to our lives and our members' lives. Donors – individuals, foundations, and corporations – are expressing a need to do something to affect real change. This session will study a case from an association tackling fundraising during the uncertain times of 2020 and early 2021. Learn how to craft relevant, empathetic appeals and how to steward supporters during difficult economic times, moving towards impactful lifetime giving.

2:00-2:30 PM ET, virtual: **The Ethical Nonprofit**

Speaker: Cecilia Sepp, CAE, CNAP, VEIP, Principal & Founder, Rogue Tulips Nonprofit Consulting & Association Management Services

An insightful and thought-provoking ethics overview that is designed for professionals in the nonprofit profession, presented by the CEO & Founder of The 501c League. This session demonstrates AFG's commitment to supporting ethical development within our profession, which protects the integrity of what we do.

3:00-3:45 PM ET, virtual: **Designing the Right Fundraising Campaign: How Do You Lead Your Organization – and Your Board – to Success?**

Speakers: *Barbara O'Reilly, CFRE, Principal of Windmill Hill Consulting, and Stephen E. Peeler, CFRE, Executive Director, IDSA Foundation*

2020 forced every organization to accelerate or pause and certainly change its fundraising. This was true for annual giving and for campaigns planned or underway. Transformational campaigns require big, bold visions, careful preparation, and the right mix of staff and volunteer engagement. As we look to a post-COVID fundraising landscape, how should associations prepare for future campaigns?

4:15-5:00 PM ET, virtual: **Part I: Associations as Changemakers: A Blended Approach to Drive Impact and Investments
A Two-Part Pre-versation (Presentation + Conversation)**

Speakers: *Bruce Arbit, Principal, Melarbit Impact Partners; Lisa Lanzkowsky, Chief Development Officer, AIChE Foundation; Matt Harris, President & Founder, The DRINK Agency; and Alvenia Scarborough, Senior Vice President of Corporate Communications & Chief Brand Officer, The Chemours Company*

Forming association and industry collaborations that blend profit and purpose activates the participation and imagination of stakeholders. AIChE is sparking a movement among its members, with over \$30MM raised. A recent winner of the Power of A award, AIChE Foundation is adapting fundraising campaign best practices to fund innovative programs and launch transformative new initiatives. In so doing they are shaping the future of a profession, an industry, and our world. This unique panel provides the opportunity to learn from all angles of a case study: association, investor, and partners.

5:00-5:30 PM ET, virtual: **Part II: Associations as Changemakers: A Blended Approach to Drive Impact and Investments - A Two-Part Pre-versation (Presentation + Conversation)**

Building on the prior session, a time for additional Q&A and dialogue. As the Annual Edge Conference concludes, this is a chance for a freewheeling debrief on questions like: what does transformation look like at my organization? Grab a beverage of your choice – the conversation will segue into a virtual happy hour!