



# PHILANTHROPY: THE “NEW” ROARING TWENTIES

October 2 – 5, 2022  
 Royal Sonesta New Orleans  
 New Orleans, Louisiana

## CONFERENCE AGENDA

### Sunday, October 2, 2022

6:00 PM – 8:00 PM

**Opening Reception**

### Monday, October 3, 2022

7:30 AM – 8:30 AM

**Breakfast**

8:30 AM – 9:00 AM

**Welcome, Opening Remarks**

**Jake Lyons, CFRE, CNP** | *President & CEO* | Pride Philanthropy

9:00 AM – 10:00AM

**10 Best Fundraising Ideas of the Past Year**

This is it, what we’ve all been waiting for, the “take aways”. We’re flipping the script and giving you the best of the best at the beginning, so you can build your “to do” list around what you can apply when you get home. Have your sharpies ready, and no, you cannot skip the rest of the sessions!

**Marti Barrow, CFRE** | *Vice President of Client Services* | Pride Philanthropy

**Shawna Bullard, CFRE, CNP, MS** | *Executive Director of Client Relations* | Pride Philanthropy

10:00 AM – 10:15 AM

**Break**

10:15 AM – 11:00 AM

**Major Gifts: The Actual “Get Rich Quick” Scheme**

It's no secret that major gifts make up almost the entirety of mature fundraising programs, but how do we access this transformational stream of revenue? The time commitment, consistency of effort, and implementation of best practices are the only path to true fundraising success, so we will be covering the specifics of how to build and sustain a robust major giving program.

**Jake Lyons, CFRE, CNP** | *President & CEO* | Pride Philanthropy

11:00 AM – 12:00 PM

**The Fundraising Ask: Preparation, Practice, Perfection**

No matter how many asks we've made, preparation and practice always make our teams stronger. We will work on building the best team, ensuring each participant has a role aligned with their strengths, optimizing the conversation for the appropriate ask and following up to secure a commitment.

MODERATOR: **Marti Barrow, CFRE** | *Vice President of Client Services* | Pride Philanthropy

12:00 PM – 1:30 PM

**Lunch**

## Main Conference Track

## CEO Summit Track

\*Special breakout session for CEOs and organizational Executive Directors

1:30 PM – 2:15 PM

### Generational Giving: Uncovering Motivations by Age

Why do people give? Who do they relate to? What unlocks the “great gifts”? We deep dive into how different generations are motivated to give to us, and how we can apply the learnings to make their giving empowering for all sides of the equation.  
**Shawna Bullard, CFRE, CNP, MS** | *Executive Director of Client Relations* | Pride Philanthropy

### Defining the CEO Role in Philanthropy

This session, through peer discussion will examine the CEO’s interactive role in the philanthropy process with donors, the governing board, and the philanthropy or foundation board. The group will discuss the amount of CEO time devoted to philanthropy and how that time is applied strategically for maximum results. The session will also review how best to determine the most appropriate philanthropic giving level of an organization’s CEO.  
**Jim Lyons** | *Partner* | Pride Philanthropy

2:15 PM – 2:30 PM

**Break**

**Break**

2:30 PM – 3:15 PM

### Finding New Donors: Overcoming Donor Fatigue

Donor fatigue comes for us all if we are not careful, and it can be exhausting not just for the donors, but for our staff too. How do we branch outside of going back to the same group of people every year (or more often!) to support every new initiative? We will cover both how to keep your donors excited and engaged, and how to expand your donor pool to new individuals, businesses, and foundations.  
**Jake Lyons, CFRE, CNP** | *President & CEO* | Pride Philanthropy

### Establishing and Managing Specific Expectations and Metrics for Philanthropy

Successful management of any process involves the establishment of realistic and challenging objectives. In philanthropy those expectations are typically focused on setting and tracking campaign goals, dollars raised, revenue/expense ratios, and tracking of key performance indicators. In addition, this session will review what CEOs can expect in regular philanthropy reports, including the level of detail and frequency.  
**Jim Lyons** | *Partner* | Pride Philanthropy

3:15 PM – 4:00 PM

### How Fast Things Move in Our Ever-Changing World

By the time you read this, a new flavor of the month will be introduced. Join us as we work through the changes, how to adapt, how to stand strong, and how to survive in a world that seemingly changes in the blink of an eye.  
**Marti Barrow, CFRE** | *Vice President of Client Services* | Pride Philanthropy  
**Shawna Bullard, CFRE, CNP, MS** | *Executive Director of Client Relations* | Pride Philanthropy

### Incorporating Philanthropy into the Short and Long-Term Institutional Strategy

Philanthropy is increasing in importance for the financial needs of nonprofits of all types and sizes. This interactive session will cover how philanthropy can be included into the strategic planning process. Timing of projects, costs, and donor appeal can all be a part of the decisions of how much to anticipate in charitable gift income. Discussion topics will include how philanthropy can impact current cash flow, as well as budgeting for significant future projects.  
**Jim Lyons** | *Partner* | Pride Philanthropy

4:00 PM

**Adjourn**

**Adjourn**

6:00 PM

**Beer, Wine, and Hurricane Reception**

# Tuesday, October 4, 2022

7:30 AM – 8:30 AM

## Breakfast

8:30 AM – 9:30 AM

### **“Trick” Your Board Into Being Engaged**

Call it what you want it, but we’re magicians in the flesh and not all “tricks” are bad! Our board members are our VIPs, let’s learn together how to get/keep them engaged, and flip the script on them proving themselves to US to help further our missions. It’s all in the motivations!

**Shawna Bullard, CFRE, CNP, MS** | *Executive Director of Client Relations* | Pride Philanthropy

9:30 AM – 10:30 AM

### **Psychology of Giving**

Ever wonder WHY philanthropy is a half-trillion dollar industry? What about our biology compels us to give away resources to charities every year? And more importantly, how can we use this information to better connect with our donors. If we understand how people think about giving, we can harness that information to help direct more philanthropic dollars to our mission.

**Jake Lyons, CFRE, CNP** | *President & CEO* | Pride Philanthropy

10:30 AM – 10:45 AM

## Break

10:45 AM – 11:45 AM

### **How to Keep Your Donors Coming Back for More: Stewardship and Recognition – Panel**

Everyone likes to feel appreciated but not everyone is intentional about their stewardship efforts. Let's discuss how to make a difference by expressing gratitude through impactful and meaningful interactions with our supporters so that we can inspire repeat gifts and deepened relationships to keep our donors coming back for more year after year!

MODERATOR: **Marti Barrow, CFRE** | *Vice President of Client Services* | Pride Philanthropy

11:45 AM – 12:30 PM

## Lunch

12:30 PM – 1:15 PM

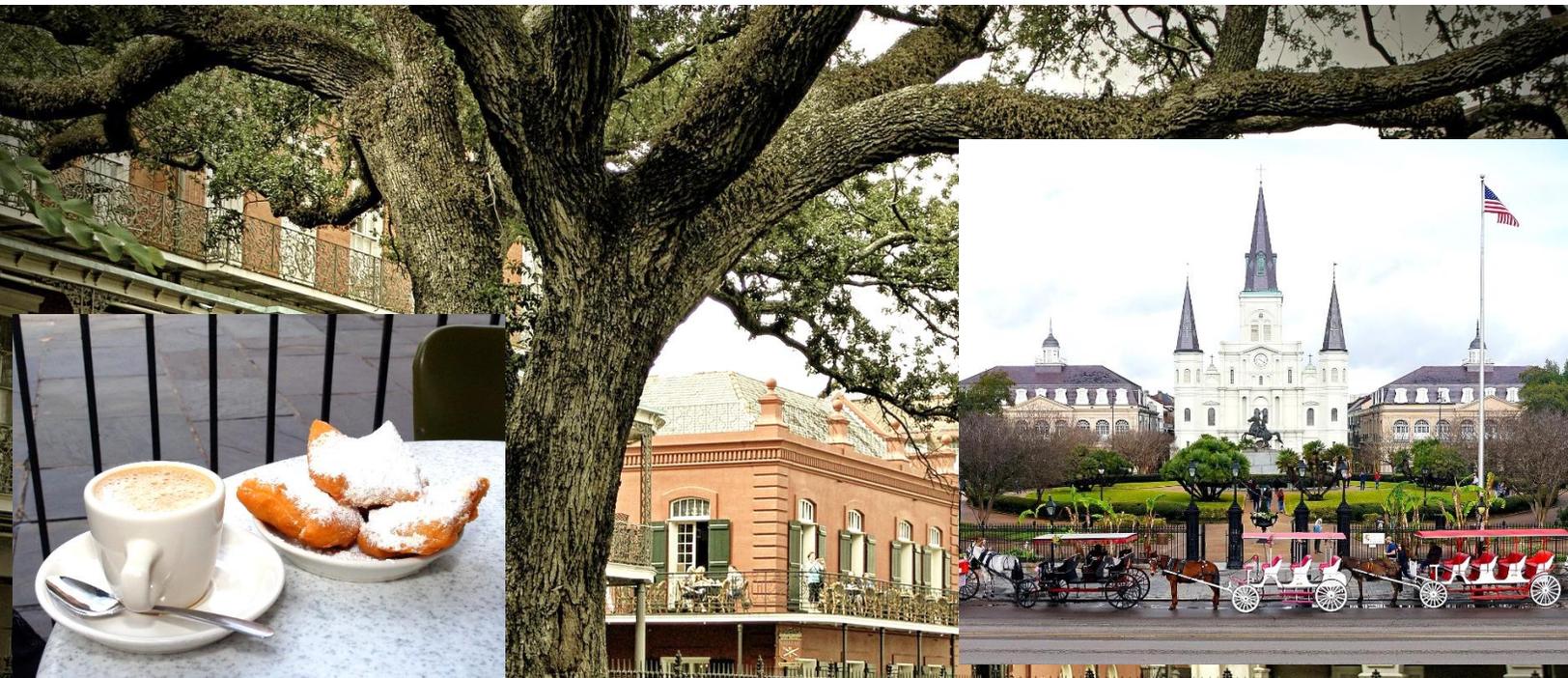
### **Fundraising Family Feud Gameshow**

We put a little of the "fun" back in fundraising in this lively game for the whole conference! We can neither confirm nor deny Steve Harvey's live participation.

GAMESHOW HOST: **Jared Lyons** | *Executive Director of Business Development* | Pride Philanthropy

1:15 PM

## Adjourn – Afternoon and Evening Free



# Wednesday, October 5, 2022

7:30 AM – 8:30 AM

## Breakfast

8:30 AM – 9:30 AM

### Cryptocurrency in Fundraising

Of all the fast-changing topics in philanthropy, crypto seems to move the fastest. *What do I need to know about the crypto industry as it relates to fundraising? Does my organization need to accept crypto donations? And how? What does this change about our approach going into 2023?* Come hear the latest as we filter out all the noise and present the useful must-knows of cryptocurrency in philanthropy.

**Jake Lyons, CFRE, CNP** | *President & CEO* | Pride Philanthropy

9:30 AM – 9:45 AM

## Break

9:45 AM – 10:30 AM

### “But We Are Different Here”: Industry-Specific Breakouts

Nonprofit fundraising has so many different sub-niches with their own unique challenges and best practices. Ever gotten fundraising advice and thought, “well, that doesn't apply to my organization unfortunately.”? We will be breaking into groups by organization type and discussing the unique challenges and solutions for our sector. Whether you are a hospital, school, church, community service organization, hospice, or more, we've got you covered! MODERATOR: **Marti Barrow, CFRE** | *Vice President of Client Services* | Pride Philanthropy

10:30 AM – 11:30 AM

### Stump the Staff: Bring Your Toughest Fundraising Questions – PRIDE Staff Panel

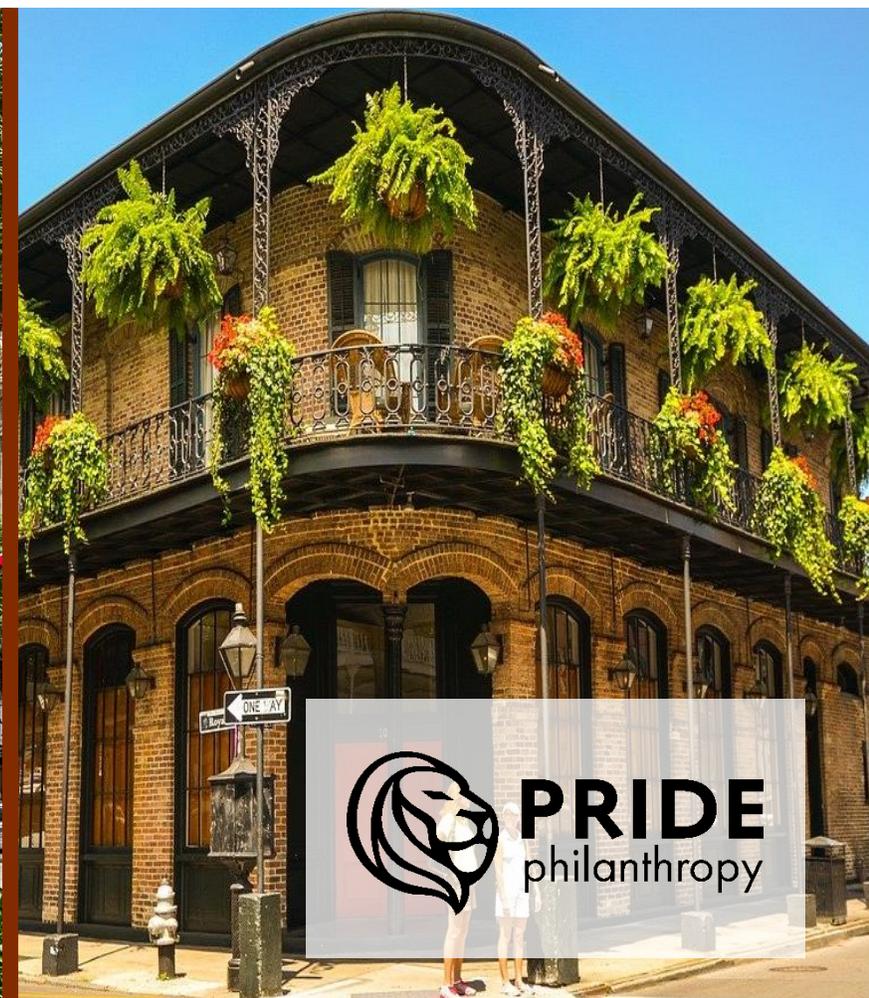
Have a tough question? Be ready to ask the PRIDE team live in front of a whole auditorium of people! We think we can't be stumped, but not even the experts know everything, so bring your trickiest situations, strangest conundrums, and hardest questions for this interactive closing panel!

11:30 AM

## Adjourn



  
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philanthropy