

EARLY CHECK IN **7:30AM**
PRE-SYMPOSIUM SESSIONS **8AM - 8:45AM**

- *Making the Transition to Fund Development Professional*
Amy Towner – **Santa Cruz Room**
- *Finding Career Growth in Your Current Job*
Suzanne Elliott – **Santa Rosa Room**
- *To CFRE or Not to CFRE – That is the Question*
Heidi Whitman – **La Cosecha Restaurant**

REGULAR CHECK IN **8:30AM**
MORNING PROGRAM **9AM - NOON**

Welcome

- Catherine Kort, Chair, 2018 Symposium
- Steve Willmont, President, AFP Santa Barbara Ventura Chapter

Opening Remarks

- Presenting Sponsor Suzi Schomer, Vice President and Business Development Officer, Montecito Bank & Trust

Keynote Presentation

- Gail Perry, MBA, CFRE, President, Gail Perry Consulting Group

NETWORKING LUNCH **NOON - 1:00PM**
 TOP OF THE HARBOR BALLROOM

AFTERNOON SESSIONS **1PM - 2:15PM**

- *Identifying the Right Prospect, for the Right Gift*
Cristian Hamilton – **Santa Cruz Room**
- *Creative Cultivation and the Art of the Ask*
Mary Schmitz – **San Miguel Room**
- *Guiding Donors to the Next Level of Support*
Molly Ann Woods – **Santa Rosa Room**

DESSERT & COFFEE **2:15 - 2:30PM**
CLOSING SESSION **2:30 - 3:00PM**
 Gail Perry, MBA, CFRE



AMY TOWNER
 CEO, Health Care Foundation for Ventura County

Making the Transition to Fund Development Professional

For newcomers to the profession, experienced marketing and fundraising volunteers, and board members who may be contemplating a career shift, you will learn first-hand what it's like to transition to a rewarding career as a fund development professional. When you love what you do, you never work a day in your life!



SUZANNE ELLIOTT
 Principal, Envision Consulting

Finding Career Growth in Your Current Job

The high turnover rate in the development profession is well documented, so it's become the norm for most fundraisers to expect to stay in their current position for just two years or less. But what if you didn't have to leave the job you have now to find the challenges, rewards and meaning you're seeking? This session will help development professionals explore ways to advance in their careers without jumping to a different organization. Many workshops focus on how nonprofit employers can retain their fundraising staff, but this one tackles how fundraisers can shape the elements they control to create a situation in which they WANT to stay.



HEIDI WHITMAN, CFRE
 Director of Development & Communications
 Santa Barbara Botanic Garden

To CFRE or Not to CFRE – That is the Question

Have you thought about earning your CFRE -- Certified Fund Raising Executive -- credential, but not sure if you should try? This session will answer all your questions. You'll learn: what's involved in earning your CFRE, how you can easily start your online profile today even if you're not sure you'll take the test, how fundraisers with a CFRE are viewed differently and paid better, and much more. Come join us for an informative session that could change your career!



CRISTIAN HAMILTON, CFRE
 Senior Director of Development, Relationship Management, & Data Sciences,
 The Autry Museum

Identifying the Right Prospect, for the Right Gift

Whether you are new to prospecting and want to prioritize your time or needing to build a new more robust pipeline for an established organization, a small, medium or large shop... there are right ways and wrong ways for identifying and cultivating the right prospect from the right data for the right gift. You will learn how The Autry Museum successfully applied their approach to help in completing a 5-year \$80 million campaign through data gathering, data management, and reporting.



MARY SCHMITZ
 Director of Development, Community Memorial Health System Ventura County

Creative Cultivation and the Art of the Ask

We don't really "cultivate" donors (something we do to them); we "engage" with them. Why "ask" donors for money when we can "invite" them to "invest" in an outcome that resonates with their philanthropic priorities? How we speak about our "potential partners" forms the basis for how we work with them throughout our relationship. Using examples from Community Memorial Health System's recently completed \$25million capital campaign in Ventura County, we will share the engagement and invitation strategies we found most successful; how they aligned with our imperfect (but realistic) beginnings; how they matched the culture of the community we serve; and how these creative approaches and lessons learned can be adapted to settings big and small to advance participants' causes.



MOLLY ANN WOODS, CFRE
 Chief Development Officer, New Directions for Veterans

Guiding Donors to the Next Level of Support

Fundraisers can sometimes get a bit stuck in our ways, find ourselves having to cut corners or worse, become neglectful of our pipeline of current donors because we're juggling too many other competing priorities. While there is no one-size-fits-all way to steward donors, there are ways to organize your time to increase the likelihood of a future gift. You will learn how to create a loyal donor base and what reliable strategies to implement to guide donors to new levels of giving. Leave this session with a plan you can set in motion immediately whether you are a one-person office or have a team of fund development professionals and volunteers assisting you.



GAIL PERRY, MBA, CFRE

President, Gial Perry Consulting Group

KEYNOTE SPEAKER

Disruptive Trends in Fundraising: Dealing with the Changing Major Gift Donor & Disrupting Your Board's View of Fundraising to Create New Engagement, Excitement and Revenue

Bio

Gail Perry, MBA, CFRE, is an international fundraising consultant, keynote speaker, trainer and philanthropy leader. Gail was recently named #10 on the list of America's Top Fundraising Experts, published by Philanthropy Media. Her best-selling book, Fired-Up Fundraising: Turn Board Passion into Action (Wiley/AFP) has been called the "gold standard guide to building successful fundraising boards."

Gail launched her fundraising career at Duke University and then went on to lead fundraising at the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill. You can read her weekly blogs at FiredUpFundraising.com, and also find her provocative articles at Fundraising Success, Guidestar and Capital Campaign Masters.

COMMITTEE

THANK YOU 2018 SYMPOSIUM COMMITTEE

Catherine Kort, Interface Children & Family Services
Committee Chair

Steve Willmont, Netzel Grigsby Associates
President of AFP Santa Barbara Ventura Counties

Lauren Arzu, First 5 Ventura County
Carrie Hughes, Casa Pacifica
Dena Jenson, CLU Center for Nonprofit Leadership
Amy Towner, Health Care Foundation for Ventura County
Kathy Wertheim, Werth-It Consulting
Heidi Whitman, Santa Barbara Botanical Garden

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THE AFP SANTA BARBARA/VENTURA COUNTIES CHAPTER IS HONORED TO RECOGNIZE

SANTA BARBARA FOUNDATION AS A CHAPTER SPONSOR THIS YEAR.



SYMPOSIUM ON FUNDRAISING

THE NEW NORMAL IN EFFECTIVE FUNDRAISING

Presented by
Montecito Bank & trust

June 12, 2018
Crowne Plaza Ventura Beach

