

CHAPTER MEETING SCHEDULE

2023 CHAPTER MEETING SCHEDULE

The AFP Northwest Arkansas Chapter holds chapter meetings on the third Wednesday of each month. Whether you are a member or non-member, we welcome you to join us!

Registration is on-line only.

Members: \$30.00 per monthly session

Non-Members: \$50.00 per monthly session

Each session is 2 CFRE credit hours

Please note the registration for AFP events or meetings is non-refundable.

Sponsored by:



The 4 Pillars of Donor Relations, Inspiring Donors to Their Highest Level of Philanthropy

Purpose-Driven Engagement - Meaningful Moments You Can Measure

Date: January 18, 2023

Time: Announcements at 8:30 am - Program 8:45 am - 11:30 am

Location: NWACC Springdale Campus, 6101 Co Road 889, Springdale, AR

Presented by: Matthew Helmer

Matthew Helmer

Matthew became a founding member of the Donor Relations Guru Group in 2015. With an extensive background in event production, fundraising, constituent engagement, and team development, Matthew S. Helmer is committed to elevating the way people experience organizations. Previously, Matthew served as Assistant Vice President of University Advancement at Colorado State University, providing the creative and strategic leadership for a talented team of event, communications, and donor engagement professionals.

Matthew's philosophy is that every experience should be designed from a meaningful, well-articulated purpose – without it, the moment becomes just something that happens. Known for a love of novel ideas, Matthew led an innovative reorganization at

Colorado State in 2010, consolidating responsibility for donor, alumni, and university events under the CSU Events umbrella. This organizational shift opened the door for a candid conversation about the power of purposeful events, resulting in a more strategic approach to engagement and significantly contributing to more than seven consecutive years of record-breaking fundraising results.

Matthew's experience includes a wide range of collaborative productions, from managing campus visits for U.S. Presidents and other world leaders, to spearheading the launch of multiple comprehensive campaigns and the development of academic ceremonies including convocation and presidential investitures. Matthew's background also includes the development of engagement, cultivation, and stewardship strategy for major donors, and he regularly masterminds bespoke experiences for intimate audiences.

As a trainer, consultant and frequent speaker for Academic Impressions, the Council for the Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP), Matthew utilizes an artful blend of humor and authentic joy for the profession in his work with others. His writing has been featured in CASE Currents magazine and other national and regional publications.

A Louisiana native, Matthew is a proud alumnus of the University of Arkansas and remains an avid Razorbacks fan. He currently lives in Colorado with his partner, their son, and two fur babies.

Demystifying DAFs and DAF Donors

Date: March 15, 2023

Time: Announcements at 8:30 am - Program 8:45 am - 11:30 am

Location: NWACC Springdale Campus, 6101 Co Road 889, Springdale, AR

Presented by: Jody Dilday

Perhaps it is the acronym that intimidates us. But in the most basic sense, a Donor Advised Fund (DAF) is just another "pocket" a donor might reach into when choosing to support your mission. While many donors give from their "income pocket": using cash, check or credit card, some donors give from their "wealth pocket": via stock, securities, or real estate. Still others choose to give from retirement savings with an IRA rollover or Qualified Charitable Distribution.

The Donor Advised Fund is a "pocket" specifically intended for charity.

Topics covered in this presentation include:

What are DAFs?

- How do they work? And what special rules do I need to know about?
- Targeting DAF Fundholders
- Engaging and stewarding DAF Donors/Fundholders
- Recording and recognizing DAF gifts
- Insights from a Financial/Wealth advisor on working with DAF Fundholders

Presenting Speaker:

Jody Dilday, Vice President Northwest Operations

Arkansas Community Foundation

Using Donor Motivations for Growth: The New Development Plan (Part 1 & 2)

Date: May 17, 2023

Time: Announcements at 8:30 am - Program 8:45 am - 11:30 am

Location: NWACC Springdale Campus, 6101 Co Road 889, Springdale, AR

Presented by: Katie Lord

The world is changing, and so is fundraising. Through the pandemic and beyond, the nonprofit sector needs to adapt to the expanding world of personalized and segmented messaging. In this session, you will learn more about donor motivations and how to utilize donor- and community-centric messaging tailored to your organization's mission and outreach. You will leave with a strategy to implement personalization, segmentation, and donor journeys.

- - Understand donor psychology and behavioral economics
 - Develop basic segmentations and create donor journeys
 - Create a development plan based on your donors' needs

Presented by: Katie Lord

Katie Lord is Vice President of Nonprofit Development at Proof and brings extensive background in nonprofit development and marketing. At Proof, Katie works with nonprofit client partners to create deeper, more strategic relationships with donors, volunteers and constituents using emotional data. Katie's strength and passion is working with nonprofit organizations to increase their fundraising and development success through strategic, donor-based communications.

Prior to Proof, Katie has spent her entire career working in the social sector, first in fundraising and development with three national nonprofit organizations before transferring her skills to nonprofit consulting. where she served as a Vice President and Consultant for a national firm, where she worked with clients both regionally and nationally. During her tenure, Katie worked with clients to raise millions of dollars towards their capital goals through expanding donor relationships and implementing best practices with her client partners. Katie also spent 8 years working in the nonprofit sector in development for three national nonprofits.

Katie is an AFP Master Trainer and a BoardSource Certified Consultant. She is passionate about education, women and girls' issues and increasing the democratization of giving. She enjoys sports, reading and travel and lives in Kansas City with her daughter rescue dog Ruby and cat Ollie.

CFRE: Professional Achievement and Commitment to Our Profession **MEMBERS ONLY**

Date: July 12, 2023

Time: Announcements at 10:30 am - Program 10:30 am - 11:30 am

Location: Hope Cancer Resources, 5835 West Sunset Ave, Springdale, AR

Presented by: Allison McElroy, CFRE, The McElroy Group, founding member of the AFP NWA Chapter

Alison Levin, CFRE, Senior Gift Officer, The Mercy Foundation

One-hour discussion and Q/A about the importance of CFRE to our profession; the process of earning the certification; and the Code of Ethics and Accountability Standards required.

Q/A will be centered around applying fundraising skills and knowledge to scenarios in the day-to-day work.

Free to AFP NWA Members Only

1 CFRE Credit

Intentional Dialogue: Fostering Deep Listening Skills on Your DEI Journey

Date: August 16, 2023

Time: Announcements at 8:30 am - Program 8:45 am - 11:30 am

Location: NWACC Springdale Campus, 6101 Co Road 889, Springdale, AR

Presented by: Anne Shelley and Magdalena Arroyo

This 2-hour facilitated dialogue will support AFP members as they:

- *practice deep listening skills.*
- *reflect on personal perspectives as a means to more genuinely connect with individual and organizational efforts to advance inclusion and belonging.*
- *build more mutually respectful relationships in their work toward achieving their stated DEI goals.*

Presenters:

Anne Shelley, Senior Trainer, Facilitator, and Consultant at the IDEALS Institute

Magdalena Arroyo, Trainer, Facilitator, and Consultant at the IDEALS Institute

Mid-Level Giving Program and Renewed Focus on Gift Planning

Date: October 18, 2023

Time: Announcements at 8:30 am - Program 8:45 am to 11:30 am

Location: NWACC Springdale Campus, 6101 Co Road 889, Springdale, AR

Presented by: Joycelin Randle

Bridging the Gap: How a Mid-level Giving Program can enhance your organization's overall fundraising strategy.

Description: In this session, Arkansas Children's Director of Individual Giving, Joycelin Randle, will share how and why Arkansas Children's started a Mid-level Giving Program. Participants will hear about the tools and strategies being used to grow and retain donors who invest in Arkansas Children's at a level below the major gift threshold.

Journey to a Healthier Tomorrow: How a Renewed Focus on Gift Planning is Advancing the Mission of Arkansas Children's Foundation

In this session, Arkansas Children's Hospital Foundation Executive Director of Philanthropy, Jill McIlroy will discuss how the gift planning program was transformed by the implementation of nation-wide best practices; how it increased internal buy-in from senior leadership and the board; and how the organization's gift planning campaign will help move mission through investment level philanthropy. Participants will gain insights on how to strengthen a gift planning program and how to grow more planned gifts.