



Jeffrey Byrne & Associates, Inc.

present

Fundraising & Planned Giving Best Practices

An Opportunity to Fortify Your Organization

Wednesday, April 21, 2010

8:30 a.m. - 1:00 p.m. at Jordan Room in Knowledge Park
Campus of Penn State Behrend - Jordan Road - Erie, PA, 16510

Fundraising in Challenging Times

Often people ask, "Do we really need another fundraising workshop?" Parts of the fundraising process are changing daily as we experience conditions not seen in 40 years. But many best-practices in fundraising are valid and working well for nonprofits across the nation. One of these is sound campaign planning, which helps reduce risk and improve the chances of exceeding your goals. Now is the time to focus on economic realities in conjunction with your capital campaign planning. This part of the workshop will include these topics:

- Giving Institute philanthropic review
- Essential fundraising practices
- Capacity building – Financial development plans
- Defining the case for support
- Development calendar – successful fundraising is a year-round activity
- Training volunteers
- Cultivating donors

This portion of the workshop will be presented by:

Thomas Murray, JB&A Vice President Mid-Atlantic Region, with more than 35 years of development experience, and a special focus on health care institutions

Gary Rick, JB&A Business Development Manager, with more than 26 years of experience in the human services subsector

Planned Giving: An Opportunity to Fortify Your Organization

During our planned giving discussion we will cover the following:

- Key questions to consider in starting an endowment
- What an endowment ISN'T
- Preparing the prospect to make a planned gift - Relationship cultivation
- Board's Role in Supporting a Planned Giving Program
- Players in the planning process
- Common Mistakes relating to Planned Giving Goals
- Sample goals for year one and two
- Evaluating your planned giving program

This portion of the workshop will be led by Jeffrey Byrne, President of JB&A. Jeffrey and his firm's associates have raised millions of dollars on campaigns ranging from \$1,000,000 to more than \$300,000,000 for clients across all subsectors. Among the firm's successes are campaign planning and management for: The Harry S. Truman Library Institute for National and International Affairs; The Liberty Memorial National Association's World War I National Museum; Susan G. Komen Breast Cancer Foundation Endowment Program; American Academy of Family Physicians Major Gifts effort; hundreds of capital campaigns for YMCAs; and The Nature Conservancy, Kansas Chapter Tallgrass Prairie

For more information

Contact the Nonprofit Partnership at 814-454-8800, or call JB&A consultant, Gary Rick, at 412-600-7876

To register, call the Nonprofit Partnership at (814) 454-8800, or e-mail TNP@thenonprofitpartnership.org