



Atlanta *Welcomes* APC!

November 5-7, 2009
The Fall Educational Forum

Emory Conference Center Hotel

APC
Association of
Philanthropic
Counsel

Atlanta

FRIDAY SPEAKERS Colin Ware



Colin Ware is
Vice President
of Marketing

and Sales at IDC, where he is responsible for all external relations for the 35 year-old firm. He holds an MBA from UCLA's Anderson Graduate School of Management. He joined the firm first in sales after working for three years as a Senior Consultant for The Collins Group, the largest fundraising consulting firm in the Pacific Northwest. Prior to that, he was Director of Development at the Culinary Institute of America, Director of Marketing at the Denver Center Theatre Company, and Audience Development Manager at the San Francisco Symphony. Colin also served as Vice President for Capital Campaigns at Stephen Dunn and Associates, a firm specializing in telefund and telephone ticket sales programs for the nation's performing arts organizations.

David King



David H. King,
CFRE, President
& CEO
of Alexander
Haas, has lived
in Atlanta and

been in the field of nonprofit development for more than 20 years. In his 18 years at Alexander Haas, David has provided counsel to more than 125 organizations in the areas of higher education, independent schools, hospitals, conservation, human services, churches and faith-based organizations. David's fundraising expertise and qualified client success has led him up the ranks at Alexander Haas, where he now leads the staff of the highly-qualified Partners and forward thinking fundraising professionals in Atlanta.

David has served as Atlanta Assistant Area Development Director for the United Negro College Fund and was responsible for the annual UNCF Atlanta Corporate Campaign. David began his career at the fundraising consulting firms Haas Coxé & Alexander and Coxé & Associates, prior to leaving to found the development office at the Atlanta Union Mission where he served as Director of Development.

Conference Program

Thursday, November 5, 2009

- 1:00 - 4:00 p.m. Taping of "Solutions-based" podcasts with Georgia Center for Nonprofits with volunteers from APC (subject to cancellation)
- 4:00 - 5:00 p.m. Registration at Emory Conference Center Hotel
- 5:00 - 6:30 p.m. Welcome and Velocity Dialogue Session

How will the changes in the philanthropic climate affect my practice both immediately and long range, and what types of changes should I make to my business plan to accommodate them?

Facilitator: Beth Hershenhart

What new markets are emerging, what consulting services might clients need and what changes might we make to our current services to accommodate evolving client needs; what types of partnerships might we form to meet these needs and broaden the impact of our work?

Facilitator: Wyatt Davis

What role does technology play in our marketing and delivery of services, and how can we adapt effectively to the changing technology landscape?

Facilitator: Marshall Ginn

When to incorporate your business and why?

Facilitator: Julia Pipes

- 7:00 - 9:30 p.m. "Atlanta Welcomes APC"
Dinner at the Floataway Café
www.starprovisions.com

Friday, November 6, 2009

- 7:30 - 8:30 a.m. Breakfast and Conversation
- 8:30 - 10:30 a.m. **Marketing a Professional Services Firm in a Sharp Economic Downturn**
Colin Ware, CFRE & David H. King, CFRE
This session offers marketing perspectives from two consulting firms, IDC and Alexander Haas, each with established marketing operations. The presentation will explore evolutions both firms made in their marketing in response to the changing market, including introducing new services, re-positioning existing ones, emphasizing different markets and making changes in communications and advertising. In all cases, these topics will be discussed in a workshop setting with extensive input from the audience. Our goal is to develop a master set of strategies and tactics appropriate for the smaller consulting shops and sole-proprietorships that comprise the majority of the APC membership.
- 10:30 - 10:45 a.m. Break
- 10:45 am.- 12:30 pm **Social Innovation Panel**
Moderated by Karen F. Beavor
CEO & President, Georgia Center for Nonprofits
- 12:30 - 12:45 p.m. Break and Lunch Served
- 12:45 - 1:30 p.m. Working Lunch
Planning for future Forums: A group discussion about concepts for Forum programs in 2010
- 1:30 - 1:45 p.m. Break
- 1:45 - 3:45 p.m. **Cultural Competency and Our Consulting Practice**
Dr. R. Roosevelt Thomas, Jr.
Chairman & CEO
Roosevelt Thomas Consulting & Training
- 3:45 - 4:00 p.m. Break
- 4:00 - 5:15 p.m. APC Committee Meetings
- 6:30 p.m. APC Co-Chairs Reception
Tour of the James E. Carter Presidential Library Museum
www.jimmycarterlibrary.gov/
Underwritten by NOZA Research

Saturday, November 7, 2009

7:30 - 8:30 a.m. Breakfast & Roundtable Discussions

8:30 - 10:30 a.m. **Cutting Edge Research**

Calculated Risks: An Approach to Measuring Risk in Grantmaking Portfolios

Nonprofit Competition in the Philanthropic Marketplace: Exploring the Relationship Between Nonprofit Financial Health and Grant Size

Grantmaking by Multiple Foundations in Competitive Nonprofit Markets: Spreading the Wealth or Winner Takes All?

Elite Philanthropy Networks in a Local Grants Economy: Who's In and Who's Out?

Using Principal Agent Theory to Understand Foundation Grant Making

Louis Falk & Jasmine McGinnis
Andrew Young School of Policy Studies
Georgia State University

Learn about exciting research regarding the level of risk foundations take with their grantmaking portfolios. By comparing grant portfolios preliminary findings suggest that foundations of all types are risk averse. However, foundation type, size, and age explain some variation in foundation risk scores, with larger foundations appearing more risk-averse and community foundations being less risk-averse than other foundation types.

Lewis Faulk is a Ph.D. student in Public Policy at Georgia State University and Georgia Institute of Technology and is a graduate research assistant in the Nonprofit Studies Program at the Andrew Young School of Policy Studies at Georgia State University. He has authored and co-authored papers and book chapters on foundation grant-making, diversity and wages in the nonprofit workforce, social enterprise, and nonprofit federations. His research interests broadly include philanthropy, community nonprofit organizations and their roles in local level public policy, nonprofit advocacy, nonprofit finance, and nonprofit management.

Jasmine McGinnis is currently a Ph.D. student in Public Policy with a concentration in Nonprofit Management in a joint program at the Andrew Young School of Policy Studies at Georgia State and the Ivan Allen College of Public Policy at Georgia Tech. In 2006 Jasmine earned her Master of Public Administration from the University of Georgia and went to work in the nonprofit sector serving as the Senior Development Manager for Special Olympics Georgia.

10:30 - 10:45 a.m. Break

10:45 - Noon **APC Member Presentation: Rethinking Endowments**

Featuring: Anne Peyton

Marketing endowment – given the recession, are we rethinking how we market and what's meaningful to donors? Are we changing investment strategies? Are we changing how we use income – percent of operating budgets? Only use above-performance income for capital projects? Are we providing good stewardship to current donors to endowment and do we need to change our thinking for new donors?

Anne Peyton CPF CFRE has worked in and with nonprofits for more than thirty years: health care, community and human services, the arts, education ((public and private, undergraduate and graduate levels), youth groups, conservation and the environment, academic and public libraries, the equine industry, financial institutions, professional associations, membership organizations, experiential and adventure education, and Outward Bound. She is a Certified Professional Facilitator and a Certified Fund Raising Executive. She holds a BA in Sociology, an MS in Library Science, an MS in Organization and Management, is certified as a Wilderness First Responder, and has been an EMT. She is trained and/or certified in the planning processes (Appreciative Inquiry, Future Search, Drucker, Balanced Scorecard), Myers-Briggs Type Indicator, and Total Quality Management systems and problem-solving tools she uses and translates into the nonprofit sector.

Noon - 2:00 p.m. Lunch & APC Board Meeting

2:00 p.m. Forum adjourns



FRIDAY SPEAKERS Karen Beavor

Karen Beavor is a graduate of Agnes Scott College and serves as

a board member or advisory board member of a variety of civic and nonprofit organizations, including the National Nonprofit Risk Management Center, Family Connections Partnership, the Foundation Center-Atlanta, The Nonprofit Quarterly, American Humanics, The Center for Nonprofit and Government Leadership at Kennesaw State University, The State Bar of Georgia's ABC Committee and the National Center for Charitable Statistics.

Karen has received the Martin Luther King Leadership award and the Harvard Business School Club of Atlanta's Community Leader Award. She is a graduate of the 2000 class of Leadership Atlanta and the 2003 Coca-Cola Diversity Leadership Academy.



Dr. Roosevelt Thomas, Jr.

During the past 25 years, Dr. R. Roosevelt Thomas, Jr. has been at the forefront of developing and implementing innovative concepts

and strategies for maximizing organizational and individual potential through Diversity Management.

Dr. Thomas' revolutionary framework for addressing diversity issues is called the Strategic Diversity Management Process™ (SDMP™). The premise of this process is that diversity exists where any two or more entities mix and that those mixtures are naturally accompanied by tension and complexity. Dr. Thomas defines diversity management as **the craft of making quality decisions in the midst of tension and complexity.**

In addition to serving as Chairman and CEO of Roosevelt Thomas Consulting and Training, Dr. Thomas is also the founder of the American Institute for Managing Diversity, a nonprofit research and education enterprise.

Dr. Thomas serves as a consultant to numerous Fortune 500 companies, corporations, professional firms, government entities, non-profits and academic institutions. He is the author of six books and numerous articles on diversity management and leadership and is a contributing writer to Diversity Executive magazine. A seventh book is scheduled for release in 2010, entitled *World Class Diversity Management: A Strategic Approach.*



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The Fall Educational Forum

**EMORY CONFERENCE
CENTER HOTEL**

1615 Clinton Road
Atlanta, GA 30329
404.712.6175

emoryconferencecenter.com

FORUM HOTEL RATE

\$149.00 per night.

Reservations must be
made with the hotel by
October 14, 2009.

**INQUIRIES AND
WAYS TO REGISTER**

Contact: Michael
Thompson
Association of

Philanthropic Counsel
119 Washington Avenue,
Suite 300

Albany, NY 12210

Phone: 800.957.5666

Fax: 518.427.9495

www.apcinc.org

info@apcinc.org

CANCELLATION POLICY

A fee of \$100 will be
charged if registration is
canceled 15 days prior
to the conference. No
refund will be made for
cancellations less than
15 days prior to the
conference.

Registration

NAME _____ TITLE _____

FIRM _____

ADDRESS _____

CITY/STATE/ZIP _____

BUSINESS PHONE _____

EMAIL _____

LIST ADDITIONAL REGISTRANT(S): _____

LIST GUEST NAME(S): _____

SPECIAL NEEDS: _____

Registration Fees

Special registration: 10% discount on single registration fee if you register a non-member for the conference

APC Members only

One registrant • \$375 (\$337.50 if you register a non-member for the conference) \$ _____

Each additional • \$300 x _____ quantity = \$ _____

Thursday dinner at Floataway Cafe • \$65 x _____ quantity = \$ _____

Non-member firm

One registrant • \$475 \$ _____

Each additional • \$400 x _____ quantity = \$ _____

Thursday dinner at Floataway Cafe • \$65 x _____ quantity = \$ _____

Payment Information (Due Thursday, October 29, 2009)

Enclosed is my total fee of: \$ _____

Check # _____ payable to APC Atlanta Forum Visa MasterCard Amex

CARD NUMBER _____ EXPIRATION DATE _____

Security Code: (required) AMEX: use CID (front above card number) _____

Visa/MC: use last 3 digits (on back of card) _____

AUTHORIZATION SIGNATURE _____