ABOUT THE ESSEX COUNTY COMMUNITY FOUNDATION

ECCF’s mission is to inspire philanthropy that strengthens the communities of Essex County. We do this by managing charitable assets, strengthening and supporting nonprofits and engaging in strategic community leadership.

ESSEX COUNTY COMMUNITY FOUNDATION

30 Andover Street | Danvers, MA 01923 | www.eccf.org | @ECCFgives

ESSEX COUNTY COMMUNITY FOUNDATION presents the 11th Annual Institute for Trustees

SUNDAE, MARCH 14, 2020
10:30 am – 1:30 pm | Pingree School • South Hamilton, MA

REGISTER HERE

ABOUT ECCF’S INSTITUTE FOR TRUSTEES

WHO SHOULD ATTEND:
Board members, board chairs, trustees, and executive directors of nonprofit organizations. Full boards are welcome! Executive directors may attend only if accompanied by at least one of their board members.

FEES:
$110 per person by February 13
$130 per person after February 13
Includes breakfast, lunch, wine reception, and the IFT Resource Guide

HOW TO REGISTER:
Registration is open now at www.eccf.org/ift. Please register early as space is limited.

LEARN
from carefully cultivated experts in the nonprofit field.

CONNECT
with peers and new networks of passionate professionals.

LEAD
your nonprofit to a stronger, inspired future.

Register for the region’s premier conference for nonprofit board members and executive directors.

Conference Details Inside

WHAT ONE 2019 ATTENDEE SAID:
I’m grateful for the opportunity to improve and strengthen my knowledge in nonprofit management and governance. I don’t know where else I could go and find such a range of opportunities!

EXPANDED BOARDCONNECT!

ECCF’s popular BoardCONNECT program has expanded for 2020! Including more options to participate, more value and an open space right to help you advance your mission. Our goal is to help talented community members and nonprofit organizations find one another, growing the pool of potential candidates for Board service and making it possible for new leaders to help guide our area nonprofits into the future.

For more information, or to sign up for BoardCONNECT visit http://eccf.org/boardconnect.

221 charitable funds managed
$24.6M grants in 2019
1,288 scholarships to worthy nonprofits
$91m in managed charitable assets

THANK YOU IFT SUPPORTERS and ECCF CORPORATE PARTNERS (as of 1.6.2020):

Amelia Peabody Foundation
Brace Cove Foundation
Edwin S. Webster Foundation
Beaufort Financial
Coastal Capital Group, Inc.
Comcast
Enterprise Bank
InSource Services
McLane Middleton
North Shore Bank
Peabody Essex Museum
Peabody People’s United Bank
The Financial Advisors

$24.6m granted in 2019
includes gifts dispersed from funds established in support of the Merrimack Valley gas crisis

Nonprofit Org. U.S. Postage PAID
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ABOUT THE KEYNOTE: LEADING FOR NONPROFIT IMPACT IN CHALLlENGING TIMES
Dr. Phil Buchanan, President, The Center for Effective Philanthropy
Author, Giving Done Right: Effective Philanthropy and Making Every Dollar Count

The work of nonprofits is uniquely challenging and difficult. Nonprofits seek to address the most vexing problems in our world and combat pervasive negative stereotypes about their work. How can leaders embrace the unique challenges of nonprofit leadership? What are the particular difficulties at play? Phil Buchanan will answer these questions and outline some key attributes required for nonprofits’ success. Drawing on extensive research from the Center for Effective Philanthropy as well as stories from his book, Phil will offer leaders both practical tips and inspiration.
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10:15 – 11:00 EXTENDED WORKSHOP SESSION 1

E51 Feasibility Study to Funding: Can Our Capital Campaign Be Successful and How Will We Make That Happen? Rick Blas, GFSE, Principal, Richard B. Blas & Associates, LLC

We will explore the capital campaign process from teasing out our case for support to celebrating campaign success and discuss strategies for mobilizing the right motivated people to give and how to encourage them to do so.

E52 Fundraising: A Major Gifts Intensive Lauren Hall, Executive Director, City Year, National Brain Tumor Society

This interactive workshop is designed to demystify the major gift process—identifying viable major gift prospects, creating creative cultivation strategies, and developing long-term donor relationships to engage donors involved with your organization over time.

E53 Taking Care of Business for Board Members; Governing Through Routine, Successful, and Challenging Times

Franklin Breen, Partner, David Harris, Managing Partner, and Christine Berube, Director, Executive Solutions LLC

Serving effectively as a board member presents complex challenges at different stages in the nonprofit life cycle. Using case studies based upon real world examples, the presenters will challenge you, as board member, to re-examine your role as you identify and resolve the governance issues of a nonprofit’s “normal” times, when “success arrives,” and when “failure” is “at the door.”

E54 Succession Planning: There should always be a plan! Gary Romans, President and CEO, Cortis Strategies

Nonprofits can face both planned and unplanned changes in leadership, being prepared to embrace that change can be essential to ensure an organization’s stability and sustainability. This workshop will offer guidance, insights, and actionable tools for a path to a successful transition.

E55 Strategic Planning – How to Chart a Course to Success

Jeff Wilkins MD, Lead Consultant, Building On The Foundation. This workshop will cover all aspects of the strategic planning process, effectively to implement and make the best use of the tools you have to help you get to “go” on a strategic planning process. We will look at how to set up and what to do with the data to determine how what kind of planning process will work best for your organization. The tools needed for your organization(s) to “plan to plan” will be provided.

E56 Messages that Matter: How to Attract New Audiences, Retain Existing Audiences, and Stay Connected with Communities

Annie Romano, Interim Vice President for Advancement, and Michael Johnson, Community Engagement Manager, Arts Hickory

This dynamic workshop will share data-driven techniques to help improve the reach of your communications, programming, and outreach to the next generation of people who want to support and public values, and offer tangible messaging examples, tools and real-time examples at help you attract and retain audiences and build community relevance. Learn how you can tap into the values and motivations of diverse stakeholders in your own community.

11:05 – 11:30 WORKSHOP SESSION I

W5A Leadership When It Counts: How to Build a Culture of Learning When Your Results Are Bad

Rick Blas, GFSE, Principal, Rick Blas

What do you do when evaluation results are unexpected? How does the experience of failure change when leadership is critical when there is temptation to hide or deflect responsibility? This workshop will explore experiences from our organization in how leaders respond to failure that demonstrates their capacity for learning. This dynamic workshop shares strategies to foster a learning culture.

W5B Upgrading Governing Documents

Brad Bedford Friend, Partner, and Evan Evans, Managing Partner, Tennyson & Dentons LLP

This session will provide an overview of best practices for upgrading by-laws and similar governing instruments for nonprofit organizations. We will delve into the key provisions that modern by-laws should contain and discuss practical solutions to common governance issues.

W5C Demystifying Brand Evangelism: A Guide to Sustainable Social Engagement

Molly Merluzzi, Founder and Principal, MM Consulting & Riveting Broads

In the non-profit sector there is often a large gap between awareness, positioning and cadence can transform the ways an organization’s purpose is truly ‘heard’. This workshop will expand board members’ understanding of how content strategies center around building and the ability to grasp what is required to drive brand-evangelism. The workshop will cover the practical steps of how philanthropic boards can be a board as a result, and build an accompanying marketing infrastructure.

W5D Accounting & Tax Update for Nonprofits

Joyce Ripplin, Partner/CMA, AAFCS4x4

This workshop will provide an overview of the recent changes to Generally Accepted Accounting Principles (GAAP) and a tax update for nonprofit organizations.

11:45 – 1:00 WORKSHOP SESSION 2

W2A How to Enhance Fundraising with Program Data: Making It Happen

Mary Knapp, President, Giving Change Evaluation Group

Many organizations collect program data; however, few are able to make it meaningful or impactful or communicate success to funders. This workshop will focus on the key lessons learned from the recent transition to Generally Accepted Accounting Principles (GAAP) and a tax update for nonprofit organizations.

W2B The Art of Discovery: How to Engage Your Board with Its Community by Asking Questions and Deep Data Analysis

Gayle L. Offord, AFCRE, Co-President, Cause & Effect
during the course the presenters will engage attendees in learning how to develop skills in data collection, planning partnerships and strong donor relationships. Gayle will share tools and techniques for building a sustainable and scalable communications plan. Gayle shares practical tips and tools on how, where and how to ask and what to do with the information you collect.

W2C How to Conduct a Member Fiduciary Duties: Conversation with the AGD

Dean, Deputy Division Chief, Office of Attorney General Maru Haley

This workshop will focus on fiduciary responsibilities and legal issues that all board members must understand to carry out their roles.

W2D The Capitalization Challenge

Bailey Haley, Project Manager, and Susan Nelson, Executive Vice President, TDC

Capitalization is the financial bridge between strategy and vision and yet undercapitalization is widespread and its corrosive effects are felt throughout the sector. Breaking the cycle of undercapitalization requires action from foundations, donors, and leaders. Join us for this workshop, which introduces capitalization concepts that have transformed the nonprofit sector in ways you can support your organization’s financial health.

1:15 – 2:35 LUNCH

Update from ECCF

Sharon Danosky, President & Founder, Danosky & Associates, LLC

For many board members fundraising something best “left to the professionals.” In this workshop, we will de-mystify the process. How does a sounding donor “suddenly” give you $500K or leave you in the dark about what board members actually become great fundraisers? We will reveal the secrets of exceptional fundraisers and invite you to share this fabulous fundraising adventure.

W2E Empowering Board Members for Successful Leadership

Nonni Fraderrando, Principal, Fraderrando Strategies

Is your board empowered to lead? Come discuss the key components and behaviors of engaged boards and their leaders, learn the formula for activating your board, and identify red flags and pitfalls that discourage active leadership.

W3C Advice from the Field: How to Use Performance Measurement to Transform Your Nonprofit

Gina Antioco, Consultant, Gina Antioco Consulting, LLC

The most valuable asset in any organization is its people. However, nonprofit commonly textbooks to valuation and leveraging diversity and managing unusual situations. Will you make the right impact decision, make progress, attract top talent, and maintain your organization’s core mission? In this workshop, board members will discover strategies for setting goals and measuring performance. By the end of the session, board members will feel more confident about their role as leaders of diverse institutions. The session will also explore the understanding of corporate responsibility and sustainability and we can incorporate awareness and understanding to transform decision making.

W3D How Advocacy Accelerates Your Mission

Rick Jakius, District Director, Office of Congressman Seth Moulton

Achieving Financial Resilience

Rick Jakius, District Director, Office of Congressman Seth Moulton

It serves. Break through the myths, confusions and game changer for your nonprofit and the people it serves. Learn how you can tap into the values and motivations of diverse stakeholders in your own community.

3:45 – 4:30 TOAST TO TRUSTEES RECEPTION