Kentucky Nonprofit Leadership Forum 2005
Hosted by the Nonprofit Leadership Initiative

Thursday, October 6, 2005
Holiday Inn North, Newtown Pike, Lexington, KY

Don’t miss the
Early Bird Deadline:
September 19, 2005
Pre-Conference Workshop  
Wednesday, October 5, 2005

Cultivating and Soliciting Major Gifts  
8:30 a.m. – 4:00 p.m.  
*Lunch included

4:00 p.m. – 6:00 p.m.  
Member Reception and Forum  
Pre-Registration

Pre-Registration  
Kentucky Nonprofit Leadership Forum  
Thursday, October 6, 2005

Registration & Continental Breakfast  
Welcome  
Session One  
Networking Break/Exhibits  
Session Two  
Luncheon & Award Presentation  
Session Three  
Networking Break/Exhibits  
Session Four

William T. Sturtevant  

Bill Sturtevant is Vice President for Principal Gifts at the University of Illinois Foundation, a position which guides relationships with individuals and families capable of gifts at a level of $5 million and above. For the past 25 years he served as Vice President for Planned Giving and Trust Relations at the University of Illinois Foundation. During his years at Illinois, he has been directly involved with over $450 million in major gifts.

Bill Sturtevant is a nationally recognized specialist in major and deferred gifts and planning and solicitation strategies. He is a frequent speaker before development professionals, hospital groups and civic organizations. He is author of the best selling book The Artful Journey: Cultivating and Soliciting the Major Gift which was published in 1997 and revised and expanded in 2004.

He earned the Certified Financial Planner designation in 1984 and regularly assists a variety of charitable organizations with complicated or unusual gift situations. He has been listed in Who's Who, and in 1995 he was honored as Planned Giving Professional of the Year by Planned Giving Today.

Mr. Sturtevant is a member of the Boards of the Sheth Foundation, the Sirasi Foundation and the Lauritsen Family Foundation. He is a founding Director of the Institute for Charitable Giving.
Join the Nonprofit Network!

Take advantage of the reduced member registration fees by joining the Initiative’s Nonprofit Network when you submit your registration.

Who Should Attend the Forum?

Executive Directors, board members, fund development staff, finance staff, program staff and other volunteers of nonprofit organizations should attend the Forum. A variety of sessions are offered to accommodate diverse levels of experience. This year’s Forum features a full Fund Development Track that will be especially helpful.

Registration Information

Registration for the Kentucky Nonprofit Leadership Forum and assignment of workshops are on a first-come, first-served basis. We encourage you to return the registration form as soon as possible. Advanced registrations and payment must be received by September 19, 2005 for a discounted rate or by the final deadline of October 3, 2005. The registration form details savings opportunities including: additional registration, multiple registrations and membership in the Initiative’s Nonprofit Network.

Reserve Your Room Now

A block of rooms has been reserved at the Holiday Inn North, host of the Nonprofit Leadership Forum. The UK Nonprofit Leadership Forum rate of $75 per night will be available through September 19 on a first-come, first-served basis. The hotel can be reached at (859) 233-0512. If you have any special assistance requests, please advise the Holiday Inn North of the accommodations when making your reservation.

Other nearby hotels include Embassy Suites 1-800-EMBASSY, Four Points Sheraton (859) 259-1311, and the Griffin Gate Marriott 1-800-228-9290.

Announcing

Fifth Third Bank

2005 Innovative Nonprofit Award

Recognizing nonprofit organizations whose innovative approaches most effectively improve their communities and our Commonwealth.

The Innovative Nonprofit Award recognizes a nonprofit organization in Kentucky implementing innovative, nontraditional programs or methods that effectively and efficiently meet community needs. The selected organization will have demonstrated creativity and vision in finding solutions to address community issues. Kentucky registered 501 (c) 3 organizations are eligible to apply. The Award is open to any type of nonprofit organization (human service, educational, environmental, arts, faith-based, etc.)

Award nomination packets are available on our website, www.kynonprofits.org. The nomination packet must be postmarked by September 2, 2005.

The 2005 Innovative Nonprofit Award winner will receive significant promotion and media recognition. Membership in the Initiative’s Nonprofit Network and a $500 organizational scholarship for Initiative services and educational event registration fees are also included.

NEW EVENT: Nonprofit Network Member Reception

Nonprofit Network members are invited to join us for a members-only reception on Wednesday, October 5 from 4:00 p.m. – 6:00 p.m. Please allow us to thank you for your membership and take this opportunity to connect with other members.

Forum Early Check-In

Pre-paid Forum registrants can beat the Thursday morning rush by picking up a registration packet on Wednesday evening between 4:00 and 6:00 p.m.

Please remember

Return your registration form as soon as possible! Workshops are assigned on a first-come, first-served basis. The sooner we receive your registration, the better your chance to get your first choices.

Don’t miss the early registration deadline! To qualify for decreased registration fees, you must submit payment and the registration form by September 19, 2005.

Bring additional staff or a board member! Take advantage of the reduced registration for additional attendees by having staff and/or board members join you at the Forum.

Join the Nonprofit Network! Take advantage of the reduced member registration fees by joining the Initiative's Nonprofit Network when you submit your registration.

Cancellation Policy

Register carefully, as there are no refunds for registration fees. Registrations may be transferred to another participant free of charge until October 3, 2005.

Directions

From I-75 & I-64, exit at Newtown Pike (Exit 115), go south on SR 992 and the Holiday Inn will be immediately on the left. For additional assistance with directions, please call the Holiday Inn North at (859) 233-0512.
Session One, 8:55 a.m. – 10:15 a.m.

1A – Planned Giving: Talking the Talk
Turney Berry
Attorney, Wyatt, Tarrant & Combs
Donors have a myriad of ways to give to your organization that they may not even be aware of – you must tell them! Learn the basics of gift annuities, charitable remainder trusts, gifts of remainder interests in houses and farms, and other interesting ideas which allow donors to help you and receive substantial Federal and state tax breaks. More importantly, learn simple explanations of these ideas to interest your donors at lunch, cocktail parties, and short meetings, without the need for spreadsheets and flow-charts (those can come later).

1B – Perspectives and Practices in Volunteer Management
Panel Discussion
Join a panel of experienced professionals to explore new trends in the area of volunteer management and effective use of volunteers. The four R’s will be discussed: recruitment, retention, recognition and risk management.

1C – Recruiting and Hiring the Right Employees for Your Nonprofit Organization
Michael J. Lichtenstein
Vice President, Marks Paneth Strategy Group
Recruiting and hiring the right employees is critical to the successful implementation of your organization’s objectives. This interactive session will explore best practices in identifying and retaining the optimal staff for your organization. Topics will include identifying the true skills and experience needed to fulfill a role, targeting the right candidate pool, and effective interview techniques.

1D – Protecting Your Nonprofit From Fraud
Elizabeth Woodward
Shareholder, Dean, Dorton & Ford
Fraud can appear as theft, misuse of assets or misleading financial reports. There are simple steps your nonprofit can take to reduce the risk of fraud, ensure that funds are properly accounted for and safeguard the organization’s assets.

Session Two, 10:30 a.m. – 11:45 a.m.

2A – Components of a Comprehensive Fund Development Plan
Marian Blanchard, CFRE
Executive Director, God’s Pantry Food Bank
Alissa Saufley, CFRE
Development Director, God’s Pantry Food Bank
Join seasoned fund development professionals for an informative session on assessing income streams, targeting funding areas for growth, creating a comprehensive fund development plan, and measuring outcomes of your fundraising vehicles. Tools for analyzing staff and financial resources will be presented to help your organization target fundraising efforts that achieve maximum results.

2B – Identifying Tomorrow’s Volunteer & Community Leaders
Stephanie Reynolds
Community Youth Development Coordinator, Kentucky Child Now!
As today’s volunteer population ages, recruiting youth may be the key to your organization’s future. To identify leadership skills in youth volunteers and cultivate these skills requires planning. Learn tips for recruiting youth volunteers, engaging them with meaningful volunteer opportunities and identifying and encouraging the development of leadership skills.

2C – Financial Reporting as a Communication Vehicle
Michael J. Lichtenstein
Vice President, Marks Paneth Strategy Group
Leigh McKee, CPA
Shareholder, Dean, Dorton & Ford, PSC
In today’s highly regulatory environment, accurate and timely financial reporting is critical to an organization’s success and well being. However, often times, nonprofit organizations fail to use their financial reports as an opportunity to better educate and engage their friends and donors. This session will discuss effective methods for communicating your organization’s story via financial reports.

2D – The Fed’s Are Coming – Is Your Organization Ready?
Foster Ockerman, Jr.
Attorney, Martin, Ockerman & Brabant, LLP
The tax exempt community (and your organization!) will likely be impacted by federal regulations being proposed by Congress and recommendations proposed by a panel of national nonprofit leaders. This session will update you on the latest developments and how these new federal laws and regulations will directly affect your organization.
Session Three, 1:00 p.m. – 2:15 p.m.

3A – We Received the Gift! Now What Do We Do?
Lee Ellen Martin, CFRE
Director of Major and Planned Gifts, United Way of the Bluegrass
President, Association of Fundraising Professionals – Bluegrass Chapter
This interactive session will discuss traditional and innovative ways to stay in touch with your donors between solicitations. Different methods to keep your organization’s name and mission in front of your donors will be explored.

3B – E-Communications: Making the Most of Email and Your Website
David Kitchen
Associate Director of Communications, United Way of the Bluegrass
Join David to learn the do’s and don’ts of web design and layout, how to get a website up and running and keep it that way, and several different ways you can utilize email to enhance your message.

3C – Boosting Your Nonprofit Organization’s Earned Income
Michael J. Lichtenstein
Vice President, Marks Paneth Strategy Group
Many nonprofit organizations are exploring the possibility of launching an earned income venture as a means of increasing and diversifying their revenue base. Unfortunately, due to poor analysis and planning, many ventures fail to meet an organization’s expectations and, in some cases, actually hurt the organization’s financial stability. This interactive session will examine the critical market forces and organizational capabilities necessary to establish and sustain an earned income venture.

3D – Cost Allocation Made Easy
Jason Schmiedt, CPA
Reimbursement Manager, Dean, Dorton & Ford
Accountability and efficiency are hot button issues in today’s nonprofit sector. Fully allocating overhead expenses is one tool to help your organization track program, fund development and administrative costs. This session will provide an overview of functional cost accounting and will discuss cost allocation plans, tracking, direct versus indirect and the pitfalls between GAAP and functional accounting.

Session Four, 2:30 – 3:45 p.m.

4A – The Advisor’s Role in Your Planned Giving Program
Turney Berry
Attorney, Wyatt, Tarrant & Combs
Nonprofit professionals need not be attorneys with estate planning expertise to have a successful planned giving program. Working with a skilled advisor can provide your organization with the expertise needed to meet the estate planning needs of your donors. Join Mr. Berry for strategies to enhance your planned giving program through a successful relationship with an estate planning advisor.

4B – Recruiting and Orienting an Engaged Board of Directors
Danielle Clore
Director, Nonprofit Leadership Initiative
Recruiting the right board of directors, effectively orienting them and keeping them educated on your organization’s needs are keys to nonprofit success. This session will discuss the changing needs of your nonprofit, successful recruitment strategies, a solid plan for orientation of new board members and ongoing board education.

4C – Using a Business Plan in Your Nonprofit Organization
Michael J. Lichtenstein
Vice President, Marks Paneth Strategy Group
A strategic business plan can be a powerful tool for a nonprofit organization. It describes an organization’s competitive environment, establishes a clear set of goals and objectives, and provides the tools needed to monitor its implementation. This interactive session will review the critical steps to an effective business planning process.

4D – Employment Law Q & A
Larry Sykes
Attorney, Stoll, Keenan & Park
Ask the questions that keep you up at night! In addition to the latest trends in employment law, find out the real story on comp time, exempt employees, flex time, family and medical leave, overtime and more.
Join the Nonprofit Network!

Benefits Include:

- A minimum 15% discount on all workshops and seminars provided by the Nonprofit Leadership Initiative.
- Free registration for select workshops.
- Reduced consulting fees provided by Nonprofit Leadership Initiative associates.
- Access to extensive web resources, including usable templates and samples.
- Opportunities to network with nonprofit organizations from across Kentucky.
- Subscription to the Initiative’s newsletter, *KY Nonprofit News*.
- Discounts on publications.
- Additional benefits being added to meet member needs!

Membership in the Nonprofit Network is an affordable investment in your nonprofit organization and in the future of the nonprofit sector in Kentucky. Annual dues cover a 12 month period and are on a sliding fee scale based on your operating budget. Individuals and corporate friends are also invited to join the Network for a flat fee. Foundation dues are based on annual grants awarded.

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<th>Nonprofit Members</th>
<th>Foundation Members (based on grants awarded annually)</th>
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<tr>
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| Less than $100,000         | $75                                                   |
| $100,000 - 499,999         | $120                                                  |
| $500,000 - 999,999         | $175                                                  |
| $1,000,000 – 1,999,999     | $250                                                  |
| $2,000,000 or more         | $350                                                  |
| Individual Members         | $45                                                   |
| Corporate/Other Members    | $250                                                  |

Visit us at: www.kynonprofits.org
Kentucky Nonprofit Leadership Forum  
October 5 and 6, 2005  
Holiday Inn Lexington-North  
Lexington, Kentucky

Please use a separate form for each registrant.

| Name: | | 
| Title: | | 
| Organization: | | 
| Address: | | 
| Phone: | | 
| Fax: | | 
| Email: | | 
| Website: | | 
| First Name for Nametag: | | 

Please mark your first, second and third choices for each session, as sessions are filled on a first-come, first-served basis. Space is limited in each session and PRE-REGISTRATION for sessions is REQUIRED by October 3, 2005. To assure your choice of sessions, please register early!

### Session One: 8:55 – 10:15 a.m.
- **1A:** Planned Giving: Talking the Talk
- **1B:** Perspectives and Practices in Volunteer Management
- **1C:** Recruiting and Hiring the Right Employees for Your Organization
- **1D:** Protecting Your Nonprofit Organization from Fraud

### Session Two: 10:30 – 11:45 a.m.
- **2A:** Components of a Comprehensive Fund Development Plan
- **2B:** Identifying Tomorrow's Volunteer and Community Leaders
- **2C:** Financial Reporting as a Communication Vehicle
- **2D:** The Fed's Are Coming

### Session Three: 1:00 – 2:15 p.m.
- **3A:** We Received the Gift! Now What Do We Do?
- **3B:** E-Communications: Making the Most of Email and Your Website
- **3C:** Boosting Your Nonprofit Organization’s Earned Income
- **3D:** Cost Allocation Made Easy

### Session Four: 2:30 – 3:45 p.m.
- **4A:** The Advisor's Role in Your Planned Giving Program
- **4B:** Recruiting & Orienting an Engaged Board of Directors
- **4C:** Using a Business Plan in Your Nonprofit
- **4D:** Employment Law Q&A

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**Registration Fees**

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Pre-Registration is required. The deadline for registration is October 3, 2005. The early registration deadline is September 19, 2005. Early registration fees will only apply if registration and payment are received on or before September 19, 2005. Registration fee does not contain hotel charges. Call the Holiday Inn directly at (859) 233-0512 for reservations.

Registration fee for the Pre-Conference Workshop includes lunch and all materials. Registration fee for the Forum includes all sessions on Thursday, October 6, continental breakfast, Award Luncheon and all materials.

**Special Assistance:** Please note any special requirements (wheelchair access, vegetarian meal, etc.):

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**Payment Information**

- Check Enclosed
- Visa
- MasterCard

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**Signature:**

*Please make checks payable to the University of Kentucky*

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Join the Nonprofit Network to take advantage of registration discounts and receive membership benefits! Membership covers a 12 month period from receipt of payment. See materials inside for fee information.

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**Please mail or fax registration forms to:**

Kentucky Nonprofit Leadership Forum  
Nonprofit Leadership Initiative  
University of Kentucky  
300 Garrigus Building  
Lexington, KY 40546-0215  
(859) 257-2542  
FAX (859) 323-2715