



2019 MEALS ON WHEELS ANNUAL CONFERENCE & EXPO CFRE SUBMISSIONS

TITLE	DESCRIPTION	SPEAKER INFO	LENGTH	FUNDRAISING KNOWLEDGE DOMAIN
A Roadmap for Succession Planning	Does your organization have leadership succession plans? If the answer is no, you're not alone. According to BoardSource's most recent "Leading With Intent" report, only 27% of nonprofit respondents have written plans. It's time to overcome the obstacles holding you back – whether it be competing priorities, uncertainty about future candidates or overall resistance – and craft a plan for board and staff succession. You'll learn practical tools to get started on a plan, what should be included in the plan and how to convey its value. Leave with a template in hand to help you implement!	Ruth Masterson , MPP, Executive Director, Meals on Wheels of Takoma Park/Silver Spring and Masterson Consulting	75 minutes	Leadership and Management
Strategies for Success with Digital Fundraising	Keeping up with the ever-evolving world of digital fundraising is essential to your organization's success. But with the digital landscape shifting and changing at a breathtaking speed, how can a small nonprofit with limited resources keep up? In this session, a nonprofit digital marketing and online fundraising expert will share best practices and innovative tactics that will enhance your ability to effectively raise money and cultivate	Jason Wood , VP Digital Development, TrueSense Marketing	75 minutes	Securing the Gift

	donors through digital channels. Case studies and real-world examples will help explore what's possible for your organization. You'll also hear from Member programs of various sizes about how they have planned, implemented and optimized their digital fundraising strategies. You'll leave with tools and strategies to take your digital fundraising to the next level.			
Event Trends: The Pressure to Innovate - Part 1	How can you make your event rise above the rest? This session will explore the technological, cultural, adult learning and design trends impacting events now and in the future. You'll learn strategies to use these trends to stave off event fatigue, distinguish your event from all the others, maintain costs, enhance fundraising and stay connected to your stakeholders. After this session, you will understand how to leverage and prepare for events on behalf of your organization while enhancing the guest experience meaningfully.	Rebecca Linder , CEO and Founder, Linder Global Events Jennifer Covert , Director, North Area Meals on Wheels Arthur Crawford , Chief Executive Officer, Silver Sage Community Center Cindy Fink , MBA, Executive Director, Meals on Wheels Rowan	75 minutes	Securing the Gift
Event Trends: The Pressure to Innovate - Part 2	This facilitated peer-to-peer session will focus on how event organizers are currently innovating. You'll start by reviewing a before-and-after case study to highlight a current response to the pressure to innovate. Then, you'll move into smaller discussion groups to identify best practices, lessons learned, available resources and which other trends your fellow peers see coming.	Rebecca Linder , CEO and Founder, Linder Global Events Jennifer Covert , Director, North Area Meals on Wheels Arthur Crawford , Chief Executive Officer, Silver Sage Community Center	75 minutes	Securing the Gift

		Cindy Fink , MBA, Executive Director, Meals on Wheels Rowan		
It's All About The Data - Part 1	Join us for this interactive session where you and your peers will not only gain a better understanding of what data is, but also how you can use it to measure the impact your work is having. We'll start by assessing where you are on your data journey. Then, we'll explore what data would be useful for your organization to collect so you're better able to make improvements, decisions and understand the extent to which you are achieving your goals. You'll learn how others are collecting and using data, take stock of the work you're already doing, discuss what information would be useful to know, explore potential data collection options, and walk away with actionable steps you can take to use data more effectively.	Michelle Molina , MA, Principle, Connecting Evidence	75 minutes	Current and Prospective Donor Research
It's All About The Data - Part 2	The healthcare system runs on data. To play in this space, we must go beyond basic client information to understand the impact of our services on specific outcomes tied to overall health and well-being. Join us for Part 2 of this two-part session to hear from a panel of your peers on the best ways to collect and share healthcare data.	Kelly Anderson , CEO, FRESH Meals on Wheels of Sheboygan County, Inc. T. Lee Covington , MPA, President & CEO, Senior Services, Inc. Holly Hagler , MM, President & CEO, SeniorServ Michelle Molina , MA, Principle, Connecting Evidence	75 minutes	Current and Prospective Donor Research
The 3 Rs of Volunteer	Volunteers are the lifeblood of many senior nutrition programs – you	Traci Lato-Smith , CVA, Owner and Principal Consultant,	75 minutes	Volunteer Involvement

Engagement: Recruitment, Recognition and Retention - Part 1	couldn't do what you do without them! Join us for Part 1 of this two-part session focused on emerging trends and innovative strategies for the "3 Rs" of volunteer engagement: recruitment, recognition and retention. You will leave with a deeper understanding of new developments and strategies in the volunteer management field, tips and tools for strengthening your volunteer programs and connections to other practitioners in the Meals on Wheels network.	Volunteer Management Consulting		
The 3 Rs of Volunteer Engagement: Recruitment, Recognition and Retention - Part 2	Volunteers are critical for many senior nutrition programs. Part 1 of this session focused on equipping you with a deeper understanding of new developments and strategies in the volunteer management field. Now, join us for Part 2, which features an interactive discussion with a panel of your peers who will share successful volunteer management strategies.	<p>Shawna Callaghan, Director of Programs, Senior Resource Association</p> <p>Sarah Drew-Watson, Vice President of Volunteer Services, Meals on Wheels, Inc. Tarrant County</p> <p>Gerald Patesel, Vice President Community Services, Peninsula Agency on Aging</p> <p>Virgina Skov, MHA, CDP, Nutrition Manager, Senior Resource Association</p> <p>Traci Lato-Smith, CVA, Owner and Principal Consultant, Volunteer Management Consulting</p>	75 minutes	Volunteer Involvement
Getting Your Organization Retirement Ready	In a competitive job market, you want to know if your organization is offering a retirement plan that is attracting and retaining employees.	Jody Jurica , Senior Vice President, Mutual of America	45 minutes	Leadership and Management

	<p>Where to start? The place to start assessing your plan is to take a close look at your retirement plan provider. Are your employees utilizing the available benefits under your plan to the fullest? Or is this hampered by “out-of-sight, out-of-mind” mentality on the part of your service provider with infrequent and/or a lack of educational and face-to-face learning opportunities. You don’t want to end up paying a lot of money for a benefit that goes underutilized and results in employees leaving seeking a better benefits package. Participants will leave with a strong understanding of how to assess your current retirement plan and ideas on how to garner more employee utilization of your benefits.</p>			
<p>Creating an Organizational Culture of Well-being</p>	<p>Burnout may be the greatest challenge of your career. In fact, it has become an occupational hazard among nonprofit staff. But it doesn’t have to be. Join us for a session focused on busting the myth that the only route to success is via overwork and fatigue and instead, learning how to create a culture of well-being in your organization where employees are cherished. You’ll learn seven comprehensive principles to dial down an overwhelming environment, as well as insights into transforming your organizational culture</p>	<p>Danielle Collins, ACC, NBC-HWC, Professional Coach, Primavera Strategies for Nonprofits</p>	<p>45 minutes</p>	<p>Leadership and Management</p>

Lessons Learned from Successful Public Relations Campaigns	Public relations is a strategic communication process that builds mutually beneficial relationships between organizations and their publics. Like any business, senior nutrition programs need to get their message, services and name out into the community. You don't have to be a million-dollar company to catch the media's eye! Join this peer-to-peer session to learn more about public relations strategies that can help you educate the public, increase donors and cultivate volunteers for your program.	Kathie Taylor , APR, Chief Marketing Officer, In Plain Sight Marketing Courtney Warner , Executive Director, Carson City Senior Center	75 minutes	Securing the Gift
Getting Your Board on Board with New Ideas and New Mindsets	What happens when you bring your great new idea from Conference back to your board? Many nonprofit boards tend to be risk averse and hesitate to leap into the unknown, so we'll focus on how to strategize your way to success back at home. Whether you're considering new partnerships in healthcare, opportunities to expand service offerings or collaborations via regional networks, it is crucial to be prepared to build board buy-in for change initiatives. This interactive workshop will explore tips, tools and strategies for planning to change mindsets and outcomes, helping you to identify steps for success when bringing your new idea back to the boardroom.	Jeanne Allen , Master Trainer, Facilitator, Consultant, Jeanne Allen Consulting	75 minutes	Leadership and Management
Navigating the Straits of Accounting Requirements	Program leaders and development professionals are often in a difficult spot: They need to enthusiastically raise funds for their organizations	Douglas A. Boedeker , CPA, Partner, Tate & Tryon	75 minutes	Ethics and Accountability

Between Fundraising and Compliance	<p>while also navigate a variety of accounting and tax compliance requirements. Problems with financial statement audits or tax compliance can damage a nonprofit's reputation and cause your board to lose confidence in your program's management. Fortunately, with proper awareness, the most significant issues can be prevented. In this session, we'll review the most common audit and tax problems that can arise from fundraising and development activities. You will leave with solid strategies to help ensure a smooth audit and tax season.</p>			
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