

2009 Marketing & Fundraising Symposium

...Raising Good Money During Bad Times

“This Conference Will Challenge Everything You Believe About The Raising of Money”

*Charlotte Berry
Philanthropist & Volunteer*

Meet Internationally Renowned Fundraising Officers:



James P. LaRose, CFRE
National Development Institute
Columbia, SC



Natalie F. Carlisle, CFRE
Development Systems International
Tupelo, MS



Wesley A. Rediger, Ed.D.
Development Systems International, Inc.
Indianapolis, IN



Jackson M. Doggette, Jr., CSPG
PAX Global
Philadelphia, PA



Phil Young
PAX Global
Lakeland, FL



Keith Marion
LifeStyle Giving
Columbia, SC



**THIS EVENT
WILL SELL OUT!
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TODAY**



April 28-29, 2009 - Columbia International University - Columbia, SC
REGISTER TODAY AT WWW.NDIEVENT.COM
or call Ouidette at 866-360-3858

2009 Marketing & Fundraising Symposium

...Raising Good Money During Bad Times

PRESENTED BY:



COURSES APPROVED FOR:



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HOW DOES IT WORK? During an economic downturn significant gifts are given by philanthropists who will amply support your organization's great dream when it's backed by a sound plan. This event will ensure that you properly identify, engage, cultivate, and invite individuals of means to invest in your organization with major gifts.

Find out the truth about our economy and how its going to affect your nonprofit agency. You don't have to fail...you can flourish.

MARKETING AND PUBLIC RELATIONS TRACK PARTICIPANTS WILL:

- Receive sample Press Kits, Press Releases, PR Plans, PSA Copy, and more.
- Learn how to write a Marketing Plan that works...and really raises money!!!
- Generate Media Outlet Lists that will carry your message into the community.
- Understand the importance of BRANDING your agency and your campaigns.
- Get above the noise of the marketplace and ensure your message is heard.

ESTATE PLANNING TRACK PARTICIPANTS WILL:

- Receive Five Continuing Education Units issued by Clemson University.
- Teach donors how to increase lifetime wealth by avoiding estate taxes.
- Understand the unique needs NonProfits can meet in the Estate Plan.
- Create an Estate Planning Program that raises New Major Gifts.
- Receive Samples & Tools you need to open doors to New Funding.

CAPITAL CAMPAIGN TRACK PARTICIPANTS WILL:

- Find out the secrets to a success feasibility study.
- Learn how to create an effective campaign plan...Is Your Success Ensured?
- Understand how to recruit & motivate Campaign Committees & Volunteers
- Discover how to listen their way to the gift
- Experience the Anatomy of a Perfect Capital Campaign

WHO SHOULD ATTEND? Non-Profit Executives, Development Officers, Pastors, Church Leaders, Board Members, Volunteers, Special Event Coordinators, and Marketing Directors, who want to increase their knowledge and skills in the areas of major gifts fundraising, nonprofit advancement, public relations and development.

TRACK #1 MARKETING & PR THAT WORKS

PUBLIC RELATIONS: RAISING THE VISIBILITY OF YOUR AGENCY

Matt Thompson - Splash Omnimedia

SUPER CONNECTIONS: ENGAGING PROSPECTS USING WEB PLATFORMS

Mike White - Splash Omnimedia

HIGH TOUCH ONE TO ONE CONNECTIONS USING INTERNET MEDIA

Matt Thompson - Splash Omnimedia

MONETIZING PASSION: AWARENESS EVENTS THAT RAISE MONEY

James P. LaRose, CFRE - Development Systems International

DEVELOPING YOUR BRAND... INCREASING PASSION AND VALUE

Mike White - Splash Omnimedia

CRITICAL DOES & DON'TS WHEN MARKETING YOUR NONPROFIT

James P. LaRose, CFRE - Development Systems International

SUPER RELATIONS: HELPING MEDIA OUTLETS ACCOMPLISH THEIR GOALS

Tim Miller - FOX Television

21st CENTURY STORYTELLING: MAKING THE CASE FOR YOUR AGENCY

James P. LaRose, CFRE - Development Systems International

THREE SUPER TRACKS ONE GREAT SCHOLARSHIP RATE

*THREE SUPER TRACKS DESIGNED TO HELP YOU
SECURE YOUR NONPROFITS FINANCIAL FUTURE*

Special **2009 ONLY**
two-day scholarship rate
\$149.00 per person

TRACK #2 ESTATE PLANNING THAT WORKS

ESTATE PLANNING THAT WORKS AND REALLY RAISES MONEY

Keith Marion — Lifestyle Giving

PLANNED GIVING AND THE OBAMA ADMINISTRATION

Jackson M. Doggette, Esq. - PAX Global

RAISING CURRENT GIFTS USING THE ESTATE PLAN

Keith Marion — Lifestyle Giving

UNDERSTANDING THE INSTRUMENTS MADE EASY - PART I

Jackson M. Doggette, Esq. - PAX Global

UNDERSTANDING THE INSTRUMENTS MADE EASY - PART II

Jackson M. Doggette, Esq. - PAX Global

WORKING WITH THE FAMILY, ADVISORS, AND COUNSEL

Jerry Wear - Lifestyle Giving

ASKING FOR THE LEGACY GIFT: Doing It Right. Doing It Well.

Jerry Wear - Lifestyle Giving

MARKETING YOUR ESTATE PLANNING PROGRAM

James P. LaRose, CFRE - Development Systems International

TRACK #3 CAPITAL CAMPAIGNS THAT WORK

LAUNCHING A CAPITAL CAMPAIGN: Doing It Right From Scratch.

James P. LaRose, CFRE & Wesley A. Rediger Ed.D

ANATOMY OF PERFECT CAPITAL CAMPAIGN: How Could It Be Perfect?

Wesley A. Rediger Ed.D - National Development Institute

MAJOR DONOR PROSPECT RESEARCH: Who Are They? Can they Give?

Timothy E. Ervolina - United Way of South Carolina

THE FEASIBILITY STUDY: Raise Your Money Before You Go Public..

James P. LaRose, CFRE & Wesley A. Rediger Ed.D

DONOR'S PERSPECTIVE: The Role of Volunteers in Capital Campaign.

Charlotte Berry & Louise Slater — Woman In Philanthropy

THE ESTATE PLAN: The Role of Planned Gifts In Capital Campaign.

Keith Marion — Lifestyle Giving

ASKING FOR THE CAPITAL GIFT: Doing It Often. Doing It Well.

Natalie Carlisle, CFRE - Development Systems International

INSTITUTIONAL VIABILITY: Are You Ready For Campaign?

Natalie Carlisle, CFRE - Development Systems International

SPECIAL GIFT - COMPLIMENTARY FUNDRAISING TOOLS WITH CONFERENCE REGISTRATION

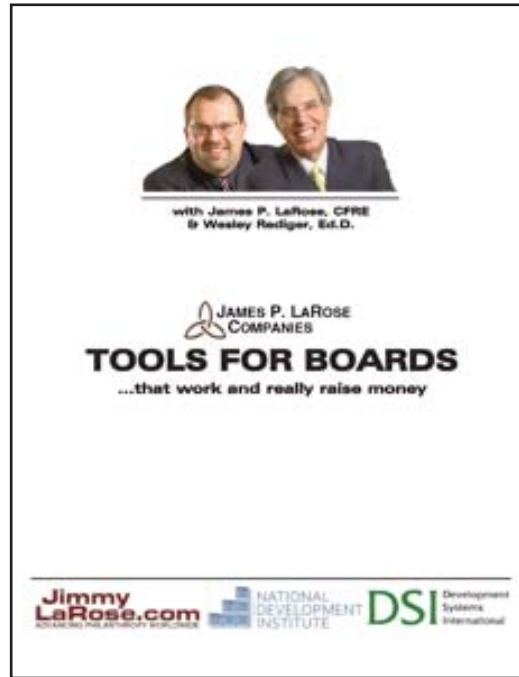
Register now and receive JIMMY LAROSE's BOARD RETREAT FUNDRAISING KIT a \$350 Value

BOARD RETREAT FUNDRAISING KIT: **FREE** COMPLETE KIT FOR BOARDS THAT WORK...AND REALLY RAISE MONEY

Playing Twenty Questions With
Your Board of Directors
SUPERCULTIVATION DVD



Tools For Boards That Work
...and really raise money
BOARD RESOURCE MANUAL



PRE-RETREAT AUDIO ORIENTATION
Wesley and Jimmy's Famous Teaching That
Has Inspired Boards Around The World

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Conference Summary

Frequently Asked Questions (FAQ)



THREE SUPER TRACKS one SCHOLARSHIP RATE

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COLUMBIA INTERNATIONAL UNIVERSITY

MCQUILKIN BUILDING - PAMPLIN AUDITORIUM
7435 MONTICELLO ROAD COLUMBIA, SC 29203

START TIMES

CONFERENCE REGISTRATION OPENS 8:00am
CONFERENCE START 9:00am

HOTEL LODGING

RADISSON HOTEL - BUSH RIVER, COLUMBIA, SC
2100 Bush River Road , Columbia SC 29210

Call (803)731-0300 and ask for the NDI Rate (Only available by calling the front desk)

2009 Symposium Faculty

James P. LaRose, CFRE: Co-Founder, NDI

jimmy@jamesplarose.com

James P. LaRose, CFRE known around the world as Jimmy LaRose the "Fundraiser's Fundraiser" continues to transform nonprofit executives tasked with raising money in a tumultuous 21st Century economy. His passion for the nonprofit sector is without bounds and his love for individuals who serve it is unparalleled. Jimmy's heroes are those men and women of the charitable world who lay down their lives daily for the hurting and the hopeless. Jim, during his career as a development professional has assisted over 325 non-profit institutions in the U.S. and overseas. The organizations he's served include child and human welfare agencies, colleges and universities, private K-12 schools, civic organizations, mental health institutions, animal protection agencies, and fine arts coalitions. He specializes in major gifts cultivation, special events, direct mail, foundation solicitation, annual fund campaigns, capital campaigns, feasibility studies and board/staff development. Jim has worn the hats of conference speaker, development officer, and agency director, and is past President of both the Association of Christian Development Professionals (ACDP) and the Western Maryland Chapter of the Association of Fundraising Professionals (AFP). He is the founder of the National Development Institute, a certificate program for development professionals committed to continuing education. He holds the Certified Fund Raising Executive certification from the AFP and was recently named Outstanding Executive Fundraiser of the Year by the AFP's Carolina Chapter. He is a graduate of Indiana University's Executive Leadership Institute and Faculty Training Academy, Indianapolis, IN, the National Planned Giving Institute, Memphis, TN, Tennessee Temple University, Chattanooga, TN and Word Of Life Bible Institute, Schroon Lake, NY.



Wesley A. Rediger, Ed.D: Co-Founder, NDI

wesley@funddevelopment.com

Wesley, author of the "Perfect Capital Campaign" concept and co-founder of the National Development Institute entered Jimmy's life in 1996 and became his greatest influence. Jimmy is fond of sharing with audiences, "Wesley's knowledge of development is without bounds...he's challenged everything I believe about the raising of money. " Having traveled the world together, they now sow their vast experience into a new generation of development officers, challenging them to "get out of themselves, find a need, and meet it." Wesley Rediger has more than twenty years of professional experience in higher education including ten years as chief student development officer and six years as vice president for development. Dr. Rediger has comprehensive experience in all aspects of advancement including fund-raising, public relations, alumni, parent and community relations, current fund and campaign leadership. During Dr. Rediger's tenure as vice president for development at Huntington College, the number of annual fund donors and gift income increased more than 30%. He directed a comprehensive campaign for current funds, scholarships, and endowment, including deferred gifts, which generated \$4.3 million against a goal of \$4 million. Dr. Rediger has also served as a development auditor for the Coalition for Christian Colleges and Universities. Dr. Rediger holds a B.A. from Taylor University, an M.A. in Student Personnel Administration and an Ed.D. in Educational Leadership from Ball State University. He holds the Certified Fund Raising Executive certification and is also certified to administer, score and interpret the Myers Briggs Type Indicator which he has used widely in management training and team building seminars.



Conference Faculty (cont.)

Natalie F. Carlisle, CFRE: Senior Faculty

ncconsulting@bellsouth.net



Before launching her own successful consulting practice Natalie Carlisle served as Vice President for Development at Mississippi Methodist Senior Services overseeing development office start-up, annual giving, capital campaigns, special event planning, major gift programs, planned giving, volunteer recruitment, staff and volunteer training, and board development. Natalie's fundraising experience includes senior housing, healthcare, substance abuse prevention, museums, political campaign fundraising, festivals, churches, social services organizations, civic clubs and other community service associations, as well as state and national resource/service provider organizations. She is available and regularly presents on a variety of fundraising topics for national, state, and local associations. Natalie has been designated as a Certified Fund Raising Executive by the Association of Fundraising Professionals (AFP), is a graduate of the Planned Giving Institute at the College of William and Mary, has attended both the University of North Alabama and Auburn University, Earning a Bachelor of Science degree in Marketing, is certified Franklin-Covey Facilitator for the Seven Habits of Highly Effective People Workshop Series, and has served as the Mississippi Center for Nonprofits, Chair of the Board of Directors.

Jackson Michael Doggette, Jr J.D., CSPG: Senior Counselor

doggette@mac.com



Jackson Michael Doggette Jr. is an ordained minister and attorney at law. His academic preparation for service includes a B.A. in Theology from Oakwood College, M.A. in Religion from Andrews University, and J.D. from Thomas M. Cooley Law School. Additionally, Mr. Doggette has earned designations as a Certified Specialist in Planned Giving from the American Institute for Philanthropic Studies, California State University at Long Beach Foundation, Certified Life Coach from The Life Coach Institute, Executive Leadership Training through the CEO Workshop for Advanced Ministry Chief Executive Officers, Certified Trust Officer through the General Conference of Seventh-day Adventists, and Certified Family Mediator through the Supreme Court of Florida. Mr. Doggette's experience in leadership with nonprofit organizations spans more than 28 years. As senior pastor of small and large congregation, former Chief Legal Officer of Florida Hospital, and member of many community nonprofit boards, Mr. Doggette has learned how to effectively move organizations forward in an efficient and effective manner to achieve predetermined goals. As a consultant to nonprofit organizations, Mr. Doggette has taught boards and executives how to lead paid and volunteer staff to achieve more than they thought was possible. Mr. Doggette is the leader of Doggette Law Firm, P.L. with a practice focus in estate planning, charitable gift planning, and general counsel to nonprofit organizations.

Conference Faculty (cont.)

Phil Young: Senior Counselor

phil.young@counselorteam.com

Phil Young is Co-Founder and President of Aquasis LIFE H2O Charities, Inc., an Atlanta based Christian non-profit corporation that raises funds for safe water initiatives in underdeveloped countries. Phil is an ordained minister and a 30 year veteran of full time Christian ministry. He has led fund raising efforts throughout North America since 1978. For the past three decades, Phil has thrived in numerous fundraising positions, and has pioneered a number of non-profits, generating millions of dollars for missions and



Christian ministries. For four years, Phil led out on the Loans Committee and the Budget and Audit Committee of the Florida Baptist Convention, an organization which raises and invests over \$30 Million annually for mission efforts. Phil served as Chairman of the Board of Directors for the Baptist Convention of New England 1999-2001. In 2002, he accepted the leadership and development role of a worldwide mission outreach effort entitled Bold World Impact at the Church at the Mall in Lakeland, Florida. In 2003, Phil co-founded the Global Reach Foundation (GRF) to raise the needed funds for the massive missions undertaking of Bold World Impact. From 2003-2006, Phil served as President and CEO of GRF, successfully leading capital stewardship campaigns and donor develop-

ment initiatives. During his four years as President, GRF grew to over \$3 Million in annual revenues. Since its inception only five years ago, GRF has broadcasted Christian programming into the unreached Muslim world, planted 22 churches, and conducted humanitarian ministry across North America and in seven countries around the world. Phil is an active member of the Association of Fundraising Professionals. His heart is to assist non-profit organizations in maximizing their impact through effective stewardship of all available resources.

Keith Marion: Columbia International University

kmarion@ciu.edu

Keith Marion is Senior Vice President for Development and Operations at Columbia International University (CIU) and serves as Chairman of Ben Lippen School Board of Directors. He received an AA



degree in accounting from Surry Community College and his BA and MED degrees from CIU. Vocationally Keith has held accounting positions in private business as well as previously serving as the Business Manager of CIU, Vice President and Business Manager for The Cove in Asheville, North Carolina, and Director of Ben Lippen School. In addition to the ministry position he presently holds, Keith is also an ordained Southern Baptist minister and has held pastoral and other church staff positions in South Carolina. Keith has worked with Lifestyle Giving over ten years; has successfully implemented the Estate and Gift Design program for CIU and has taught estate seminars for other organizations, churches, and Evangelical Development Ministries. He has been married to the former Debbie Jenkins for 35 years and has three sons and one daughter, all living in Columbia.

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NDI Event Partners are those men and women, organizations, and agencies who have distinguished themselves in service to the Nonprofit Sector. It is our privilege to be associated with our industry's most accomplished leaders.



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