


AGENDA

 **Tweeting?**
Use #namtsc11

Friday, April 1

8:30 - 9:30 am **Check-In and Continental Breakfast**
Breakfast sponsored by The 5th Avenue Theatre
Mezzanine



9:30 - 10:15 am **Welcome Remarks**
Union Square

Marilynn Sheldon, President
Kathy Evans, Executive Director

30-Second Funding Fables
Union Square

10:15 - 11:15 am **Keynote Speaker: Penelope Burk**
Communication is the Ask: Donor-Centered Fundraising
Union Square

Penelope Burk is an author, researcher and mentor celebrated for some of the most important innovations in modern-day fundraising. *Donor-Centered Fundraising* is the breakthrough strategy that enhances donor loyalty and inspires more generous gifts. Based on seven years of research and testing with hundreds of charities and donors, *Donor-Centered Fundraising* is the only statistically-supported fundraising philosophy that brings donors and charities together to achieve measurable, long-term results. With special information on strategies and approaches for arts organizations, and practical advice on how to connect more effectively with donors in an age of information overload, this program explores how donors' sensibilities are changing in response to the economic challenges by answering the question, "What do donors want?" and providing fundraisers with a practical strategy that satisfies their needs and explores how not-for-profits can become masters of their own messages.

11:15 - 11:45 am **Networking Coffee Break**
Sponsored by The Muny
Mezzanine



11:45 am - 12:45 pm **Turning Fundraising into "Friendraising"**
Union Square

Panelists will explore the sometimes tricky relationships between funders and institutions. What drives people to give? What makes them happy? We'll look at tools including donor surveys and discuss how to perform triage in a downturn, plus hear from some donors to learn what motivates them.

Moderated by Bernie Griffin (The 5th Avenue Theatre) with Johnny Avots (California Music Theatre), Brenda MacRoberts (The Broadway Rose Theatre), Greg Phillips (Arts Consulting Group, Inc.) and Tim Whalen (ACT).

12:45 - 2:00 pm

Working Lunch: Where Philanthropy is Headed in This Age of Anxiety

Lunch sponsored by Dallas Summer Musicals

Buffet service on Mezzanine; Seating and breakout session in North Beach

In a rapidly evolving world, fundraising cannot shield itself from change. But making the *right* choices when resources are so limited and competition so fierce is the challenge that every not-for-profit faces. Luckily, your donors can point you in the right direction.

Over a working lunch, Penelope Burk will unveil brand new research conducted just last month with 17,000 American donors about what they want from their philanthropic relationships in 2011, what it will mean for your bottom line, and how you can help your theatre get out in front of the trends.

2:00 - 3:00 pm

Team Fundraising*Union Square*

Your entire staff plays a role in fundraising, not just the development department. How can board members and existing donors help you meet your goals? What must artistic directors and other leaders do to motivate the staff and the funders?

Moderated by Sharon Maroney (The Broadway Rose Theatre), with Anne Holmes (TheatreWorks), Meredith McDonough (TheatreWorks), Susan Medak (Berkeley Repertory Theatre), Kerry O'Keefe (The 5th Avenue Theatre) and Phil Santora (TheatreWorks).

3:00 - 3:15 pm

A Word From Our Sponsor

Travelzoo

Union Square

3:30 - 5:00 pm

Tracked Seminars

These two seminars will repeat at both the intermediate and advanced level. Pick the track that's right for you, and attend both topics in a smaller group. (Each group will stay in its room, and the moderators will come to you!)

3:30 - 4:15 pm

Seminar: Major Gifts and Planned Giving - Intermediate*Union Square*

Get tips for creating and maintaining a major gifts program, implementing long-term strategies, building relationships with estate donors and more.

Bernie Griffin (The 5th Avenue Theatre) and Andrew Holtz (Arizona Theatre Company).

Seminar: Building a Fundraising Board - Advanced*North Beach*

Learn how to inspire and engage your board, recruit new board members, track the involvement of existing members, and make sure your board is reaching its full potential.

Rebekah Sassi (Walnut Street Theatre)

4:15 - 5:00 pm

Seminar: Major Gifts and Planned Giving - Advanced

Union Square

Seminar: Building a Fundraising Board - Intermediate

North Beach

5:30 - 7:30 pm

Networking Cocktail Party

Sponsored by McCoy-Rigby/Peter Pan and Broadway LA



*Harry Denton's Starlight Room at the Sir Francis Drake Hotel
450 Powell Street, 21st Floor*

Directions to the cocktail party are in your conference folder.

Saturday, April 2

9:00 – 9:45 am

Breakfast Breakouts: Networking for Good

Telegraph Hill

Start the day talking with your peers about how we can use our NAMT connections to collaborate not just on musicals themselves but on fundraising strategies and ideas. How can we scale and adapt each others' successes to use nationwide? How can NAMT help you connect with each other throughout the year?

Led by Keith Cromwell (Red Mountain Theatre Company) with the Spring Conference Committee and NAMT Staff

10:00 - 11:00 am

Case Studies: Capital Campaigns

Union Square

Hear from a variety of NAMT members of all sizes about how they've pursued successful capital campaigns in this economy.

*Broadway Rose Theatre, Sharon Maroney
Goodspeed Musicals, Caitlin Quinn
Red Mountain Theatre Company, Keith Cromwell*

11:00 am - 12 noon

Corporate Sponsorship in the Age of Austerity

Union Square

How can we find new incentives for corporate funders when everyone is cutting back? Should corporations be treated as individuals? What do they get out of sponsorship? How do in-kind donations figure into the formula?

Moderated by Andrew Holtz (Arizona Theatre Company), with Allison Cagely (California Music Theatre), Laura Little (Coeur d'Alene Summer Theatre), and Pam Mowry (Lyric Theatre of Oklahoma).

12:00 - 1:15 pm

Lunch

Sponsored by R&H Theatricals

Telegraph Hill



1:15 - 2:15 pm

Research, Development and Results: Technological Tools for Fundraising

Union Square

Stay ahead of the curve on the latest tools for tracking, maintaining and engaging your donors - without losing sight of the all-important personal relationships. How do technological solutions impact staffing? What role can social media play?

Moderated by Rebekah Sassi (Walnut Street Theatre) with Chandra Asken (San Francisco Symphony), Mark Chambliss (Dallas Summer Musicals), John Kenyon (Nonprofit Technology Educator & Strategist) and a special video message from Festival alum Eddie Sugarman on "Crowdfunding."

2:15 - 2:30 pm

A Word From Our Sponsor:

Tannen and Associates

Union Square



2:45 - 3:30 pm

Community Building

Union Square

Creating strong ties to your community can have far-reaching benefits, including increasing the strength of your board, exposing yourself to new funding opportunities, unusual avenues for marketing, in-kind donations, and relationships to drive new grants. We'll explore how community-building can play a vital role in the strategies and goals discussed so far.

Moderated by Mark Fleischer (Adirondack Theatre Festival) with Brett Bernardini (The Spirit of Broadway), Keith Cromwell (Red Mountain Theatre Company) and Jim Mercer (Pittsburgh CLO).

3:30 - 4:00 pm

Wrap-Up and Final Thoughts

Union Square

End of Conference

Thank you for attending the 2011 NAMT Spring Conference.

*Your feedback is very important to us! Please fill out the evaluation form online at
namt.org/conference-spring11-evaluation.aspx
(you will receive an e-mail with this link at the conclusion of the conference.)*

2011 SPRING CONFERENCE COMMITTEE

Keith Cromwell, Red Mountain Theatre Company

Mark Fleischer, Adirondack Theatre Festival

Bernie Griffin, The 5th Avenue Theatre (co-chair)

Andrew Holtz, Arizona Theatre Company

Sharon Maroney, The Broadway Rose Theatre (co-chair)

Rebekah Sassi, The Walnut Street Theatre