Equipping .ORGs and .EDUs with the Online Tools of .COMs!

2000 National Summit on ONLINE FUNDRAISING AND E-PHILANTHROPY

Harnessing the Power of the Internet for Fundraising, Grantmaking and Philanthropy



Developing Online Fundraising Strategies for Non-Profits, Charities, Colleges and Universities

Designing Internet-based Pledging and Donation Centers that are Secure and Comply with new Fundraising Regulations

Marketing to Contributors Online and Conducting Effective Donor and Alumni Relations through the Internet

PLUS: The Do's and Don'ts for Moving Your Foundation or Development Office Online and Partnering with Online Charity Malls

Presented By:

The Performance Institute

November 8-10, 2000
West Coast Hotel, Anaheim, CA

Best Practices for Online Fundraising and E-Philanthropy

Dear Fundraising or Grants Manager:

Learn how to prepare your organization for Internet-driven changes in the way fundraising and philanthropy are conducted

Fundraising and philanthropy are moving online. The use of the Internet and other interactive technologies in fundraising and philanthropy is exploding! Organizations that are using these new vehicles dramatically transform the way they do business—allowing them to significantly expand their donor base, increase contributions and manage donations. The National Summit on Online Fundraising and E-Philanthropy will equip you with the strategies and tools to get results through the effective use of the Internet.

Foundations, Nonprofits, Charities, Colleges and Universities Sharing Best Practices for Online Fundraising

Whether you are a university, foundation, or non-profit group, this Summit will be an important asset in understanding how and when to use the Internet and other interactive technologies in your fundraising, philanthropic and grants management activities. We have assembled a diverse faculty—ranging from fundraisers, nonprofit and foundation leaders to technical experts in information technology. Each presentation is designed to present and detail successful case studies (complete from strategy and design to implementation) on how this internet technology is being applied in our communities.

Solutions to Technical Challenges and Updates on New Laws and Regulations

As you tap the power of the Internet for fundraising or philanthropy, you must be ready to comply with new laws and regulations, as well as overcome several technical challenges. That's why the Summit is being convened: so you will have a one-stop option for learning the latest requirements and solutions in the area of online fundraising and E-philanthropy.

Don't Delay the Development of Your Online Fundraising and E-Philanthropy Strategy

The Internet is not a passing fad; it is an essential vehicle for business, government agencies, foundations and non-profits. Don't delay your organization's preparations for using this important tool. Join your colleagues from foundations, higher education and non-profits at the Summit. Call (703) 519-6270 to register today!

Sincerely,

Thomas W. Russell
Chair, 2000 National Summit of Online Fundraising and E-Philanthropy

Who should attend?

Anyone involved in fundraising or information technology in an educational institution, foundation, corporation, or other non-profit group, including the following:

- **Nonprofit Executive Directors and Board Members**
- **University and College Development Officers**
- **Foundation Trustees and CEOs**
- **Charity Fundraising Executives**
- **Chief Information Officers**
- **Webmasters**
- **System Administrators**
- **Program Officers**
- **Development Directors**

Successful strategies and tools for Online Fundraising and E-Philanthropy

Proven technical solutions for developing systems and structures online

Helpful exchange of best practices among foundation, non-profit and government officials

Case studies with demonstrations of the best practice web strategies employed by:

- **Private foundations**
- **Corporate foundations**
- **Corporate giving programs**
- **Universities and colleges**
- **Matching gift and employee volunteer programs**
- **Nonprofit organizations and charities**
- **.com businesses**
- **.org charity malls**
- **Community foundations**
- **Family foundations**
- **Non-profit grantees**

10 Key Benefits that will improve the way you increase donations and forge donor relationships:

1. Incorporate the latest strategies and tools for using the Internet and other technologies from over 19 veteran experts in university, foundation and non-profit organizations
2. Comply with the latest government regulations, including evolving state regulations governing online fundraising activities
3. Expand your donor base by devising effective systems and strategies for online fundraising and exploring innovative partnerships with online charity malls and donation bundlers
4. Identify the possibilites and perils of charity malls for fundraising
5. Secure necessary funding for your technology investments through creative mechanisms, cultivating internal and external support, and building the business case
6. Collaborate on projects with other organizations and co-funders in your issue areas through Intranets
7. Ensure the security of your web-based systems to protect the confidential information of your organization, donors and grantees.
8. Recruit volunteers by tapping online communities
9. Create virtual issue communities by creating pathways of information on topics by linking media, foundation, grassroots, and government entities online
10. Expand your reach through the development of effective online communications strategies to tell your organization's story, reach new donors, identify new program partners, and influence decision makers.

Agenda and Speaking Faculty

Day One: Wednesday, November 8, 2000

7:30 **Registration and Continental Breakfast**

8:30 **Keynote Address: The Emerging Role of the Internet in Fundraising and Philanthropy**

GuideStar is a searchable database of more than 640,000 nonprofit organizations in the United States, a site where information on each nonprofit's operations and finances can be found. Hear from this leader how e-fundraising is evolving, and what nonprofits, universities, charities, and foundations should be doing to prepare for the opportunities and perils of the Internet.

Buzz Schmidt
President, Guidestar.org

9:30 **Leadership Panel: Key Perspectives, Issues and Helpful Practices for Using the Internet in Fundraising, Managing Grants and Philanthropy**

- Identify the challenges and opportunities presented by moving grantmaking and philanthropic activities online.
- Assess why the Internet and other technologies will revolutionize the way grantmaking and philanthropy is conducted
- Determine what you should do to prepare your organization for this revolution.
- Plan the next steps and helpful practices that must be explored

John Kelleher
Kelleher and Associates

Jennifer Houlihan
University of Southern California

Robert Guildi (invited)
American Red Cross

Steve Swain
Princeton University

10:45 **Morning break**

"The Internet promises to provide something new that isn't currently in the nonprofit world as we know it—self service, open access to leadership opportunities, funding of highly specialized ideas, and more efficient sharing of promising practices."

The Kellogg Foundation Report on E-Philanthropy, February 2000

11:00 **Rules and Regulations that Govern Online Fundraising**

These leaders will specify:

- Developments and evolving trends occurring in the regulation of online fund raising.
- New initiatives being explored by state charity officials.
- How you can provide feedback and influence the decision making process in the promulgation of new regulations governing e-philanthropy.

Karl Emerson
Immediate Past Chair,
National Association of
State Charity Officials

Lee Cassidy
Nonprofit
Federation

12:15 **Networking Luncheon**

1:15 **Devising an Online Strategy for Your Fund Raising Efforts**

This interactive online session will demonstrate different options for internet fundraising. Shopping malls, do it yourself sites, and other websites will be shown and evaluated. The presenters will then describe how to successfully rollout each site.

China Brotsky
eGrants.org

Ginger Lubkowitz
donordigital.com

2:30 **Afternoon Break**

2:45 **Mastering Technical Issues in Taking Gifts and Pledges Online**

This special session is designed for individuals who will have responsibility for helping organizations think through and solve technical challenges in an electronic commerce environment. In this session, the issues:

- Architecture
- Reliability
- Security
- data standards
- inter-operability
- cost-effectiveness

will be explored from a software and systems engineering perspective.

Chris Sullivan
Minnesota Council of Nonprofits

3:45 **Forging Partnerships Online**

- Determine how online intermediaries can help you get on the internet.
- Identify the steps to outsourcing your online fundraising platform.
- Recognize the costs that are involved – keep your website within budget.

Brett Lorenzen
AppNet

4:45 **Adjourn**

Last year, the American Red Cross raised $2.5 million through its website!

Day Two: Thursday, November 9,2000

8:00 **Continental Breakfast**

8:30 **The Potentials and Perils of Charity Malls**

One of the United States' leading corporations will specify how to go online and what the possibilities and perils are for using charity malls for fundraising.

Tim McCarthy (invited)
charityamerica.com

9:30 **Three Case Studies for Donors: Demonstrations of Three Sites and the Thinking Behind Each**

- Watch as each site will be shown in an online demonstration.
- Examine the planning and implementation process behind each site.

Allan Parachini
California Community Foundation

Chris Herrerra
Tides Foundation

Michael Gilbert
The Gilbert Center and Nonprofit Online News

(Due to the length of this session, a morning break will be taken at 10:30)

12:00 **Networking Luncheon**

1:15 **The Wired Foundation**

One of America's leading foundations will showcase best practices in developing online portals for foundations. Learn how grant making and communications are critical to developing relationships with grantees.

Matt Sharp
The David and Lucille Packard Foundation

2:15 **Afternoon Break**

2:30 **Online Fundraising and Donor Interface for Colleges and Universities**

Our nation's colleges and universities are at the forefront of successful fundraising online. Find out how Princeton University created a simple site online and raised $170,000 the first year and $400,000 this year. The University of Southern California will specify how they rolled out their new online site. Identify what worked and what was a challenge.

Jennifer Houlihan
University of Southern California

Steve Swain
Princeton University

3:30 **Effective Donor Interface: Getting Your Story Out and Building Online Constituencies**

- Discover the critical issues behind success on the internet
- Learn how to overcome the distance of wires, tell your story, and foster long term contributor relationships.

Rob Kusel
Localvoice.com

4:30 **Adjourn**

Day Three: Friday, November 10, 2000

APPLICATION WORKSHOPS

8:30-12:00 Choose A or B

A: Addressing Technical Issues in Online Grants and E-Philanthropy:

This special interactive session is designed for individuals who will have responsibility for helping organizations think through and solve technical challenges in an electronic commerce environment. In this session, the issues of architecture , reliability, security, data standards, inter-operability and cost-effectiveness will be explored from a software and systems engineering perspective.

(Both sessions will break at 10:30 for morning refreshments)

B: Strategies for Online Fundraising:

Using your website to host an online giving center or partnering with any of the emerging online charity malls can substantially increase your organization's donations. In this session, learn how to incorporate evolving Internet tools into your development plan, and how to better target and market to potential donors online.

"In the coming years, the question won't be whether you'll be on-line or not, but rather how you will use the Internet to strategically meet your mission!"

Foundation News and Commentary, January/February 2000

Our Mission

The Performance Institute is a resource for public, private and non-profit organizations seeking to improve their performance through strategic management and performance measurement. Offering timely conferences, training, research and consulting, the Institute positions itself as a "solutions center" for executives and managers seeking assistance, cutting-edge research, best practice analysis and "next step" advice on organizational design, change and renewal.

For more information on our programs, visit our website at www.PerformanceWeb.org.

Registration Form: 2000 National Summit on Online Fundraising and E-Philanthropy

Call (703) 519-6270; Fax This Form To: (703) 519-6271; or visit www.PerformanceWeb.org

☐ Yes! Register me for the Summit at the standard tuition rate of $995.

☐ Yes! Register me for the Summit and a post-conference workshop at $1295 **Circle one: A or B**

☐ Please call me. I am interested in a special Group Discount for me and my team.

Name _____

Title _____

Organization _____

Dept. _____

Address _____

Mail Stop _____

City _____ State _____ Zip _____

Telephone _____

Fax _____

E-mail _____

METHOD OF PAYMENT: ☐ Credit Card ☐ Check ☐ Purchase Order/Training Form

Credit Card Number: _____

Name on Card: _____ Exp: _____

Hotel Information:

This event will be held at the beautiful West Coast Hotel in Anaheim, California. The hotel is situated directly across from Disneyland and is a short drive to the beach. A limited number of rooms at a discounted rate have been reserved at the hotel and can be secured by calling (714) 750-1811 and asking for Reservations.

