



LEADING CONSULTANTS TO NON-PROFITS

2010 Summer Symposium July 15–18, 2010

What's Next: Our Clients, Our Practices, and Our Firms in a New Environment

This is one event you will not want to miss! Join your colleagues in the non-profit consulting world for learning, networking and relaxation in one of Giving Institute members' favorite places.

Sessions designed to intrigue, challenge and inspire you. Topics will range from three perspectives on the future of philanthropy, to new products and services, to insight into Giving USA numbers for 2009.

Stein Eriksen Lodge • Park City, Utah

Welcome from the Summer Symposium 2010 Committee

Dear Friends:

We warmly invite you to join your consulting colleagues for the Giving Institute's 2010 Summer Symposium: "What's Next: Our Clients, Our Practices, and Our Firms in a New Environment."

Our time together will combine provocative discussion and debate about the financial, political, and public policy factors that will shape philanthropy and the nonprofit sector for the foreseeable future. We will explore how these are likely to affect our work and our firms, and where, as the thought leaders of our field, we may be able to influence the long-term direction of the sector.

Not forgetting that we have clients to serve and firms to run, the Symposium will include practical sessions on new products and new ways of delivering services, more from Jay Love on technology, the uses of data and benchmarking, challenges in feasibility studies, and firm structures.

By popular request, we are returning to one of Giving Institute members' favorite places: Stein Eriksen Lodge in Park City, Utah. The facilities are spectacular, the rooms luxurious, the food outstanding, the staff always accommodating, the surrounding mountains breathtaking. And, there is an unparalleled array of recreational opportunities in the area. (And all for \$210 per night.)

We have kept the registration fee the same as last year for the first person from a firm. But we have reduced the fee for second, third, and even fourth registrants to encourage the widest possible participation in these important conversations about the future of our work.

So please plan to join us in Park City. The Summer Symposium offers an opportunity that can be found nowhere else for camaraderie and collegial networking with peers who actually understand what we do and the challenges we face every day.

Sincerely,

The 2010 Summer Symposium Committee
Keith Curtis, Bill Durkin, Kim Hawkins, Sarah Howard, Dick Jolly, Kathleen Kavanagh,
David King, Jay Love, Jack Miller, Kate Roosevelt, George Ruotolo



Who should attend the Symposium?

- Board members from Giving Institute: Leading Consultants to Non-Profits
- Senior managers from member firms
- Distinguished practitioners whose practices have been open for at least three years
- Senior staff from guest firms

Schedule of Events

Thursday, July 15, 2010

5:00 – 6:30 pm

Registration

6:30 – 9:30 pm

Welcome reception and dinner

Friday, July 16, 2010

7:30 – 8:30 am

Breakfast available

8:30 – 10:00 am



Session: **Looking in the Crystal Ball:
From a Scholar's Perspective**

Speaker: Paul C. Light, Ph.D., Goddard Professor of Public Service at New York University Wagner Graduate School of Public Affairs; Senior Fellow and founding director of the Center for Public Service at the Brookings Institution.

Continuing the conversation begun at the April Board meetings, Dr. Light will bring his scholarly research and deep experience with public policy and the nonprofit world to a consideration of the trends and developments that are likely to impact our work and our firms in the years to come.

10:00 – 10:15 am

Break

10:15 – Noon

Panel Session: **From the Philanthropists' Perspective:
Reaction to Dr. Light**

Moderator: Robert I. Evans, Managing Director, EHL Consulting Group

A national panel of philanthropists will respond to Dr. Light's presentation and discussion. What are they seeing? How are donors reacting to the changes in the nonprofit world that Dr. Light identifies? What does that mean for the organizations we serve?

Friday – continued

12:15 – 1:30 pm

Lunch and break

1:30 – 3:00 pm

Panel Session: **From the Consultants' Perspective:
Reactions to Dr. Light's Presentation**

Moderator: Keith Curtis, President, The Curtis Group

Panelists: William A. Durkin, Jr., President, Durkin Associates
Edith H. Falk, Chair and CEO, Campbell & Company
David H. King, President and CEO, Alexander Haas
Aggie Sweeney, President and CEO, The Collins Group

Four distinguished firm leaders will discuss their reactions to Dr. Light's remarks. Are we seeing the same trends in the sector? Does our daily experience on the ground lead us to the same or different conclusions about what they mean and how to respond to them?

3:00 – 3:15 pm

Break

3:15 – 5:00 pm

Session: **Behind the Numbers: Giving USA 2010**

Speaker: Patrick M. Rooney, Ph.D., Executive Director,
Center on Philanthropy at Indiana University

The 2009 numbers are guaranteed to be fascinating. In this always popular session, we will learn what they mean for current fundraising and what they may predict for the future.

6:30 – 9:30 pm

Reception and dinner

Schedule of Events

Saturday, July 17, 2010

7:30 – 8:45 am

Breakfast Roundtables:

Under the Microscope: The purpose, practice, and results of conducting interviews to assess campaign feasibility – how we handle confidentiality, transparency, and ethics.

What a Difference Data Makes: The act of gathering and using analytical and anecdotal information to support our work – what do we do and how do we do it.

Ready, Set, Benchmark: Standard-setting, evaluation, and gossip – how we help our clients determine how they stack up against their peers.

Adapt or Die: Strategic partnerships, consolidation, and competition – how our firms will function in the future.

8:45 – 10:00 am

Session: **Is Technology a Bother to Fundraising or Is It Essential? Part II**

Speaker: Jay B. Love, President and CEO, eTapestry

Consistently one of our highest-rated speakers, Jay will share new information about the latest trends and case studies around the crucial topic of the role of technology in fundraising. And he will, as always, offer practical “how-to’s” about implementation for the sophisticated user as well as the technology-challenged.

10:00 – 10:15 am

Break

Saturday – continued

10:15 – Noon

Panel Session: **New Consulting Services: New Ways of Delivering Services**

Moderator: Kathleen Kavanagh, Senior Executive Vice President and Managing Director, Grenzebach Glier and Associates

Panel: Michelle Cramer, President and CEO, Cramer & Associates
Frederic H. Happy, Senior Vice President and Managing Director, CCS Fundraising
Robert B. Sharp, Ed.D., President, Robert B. Sharp Company of Colorado

The panel will explore some options for consulting products and services for today’s client needs: targeted studies, product “modules” and the use of analytics, for example. We will also discuss the potential of technology in delivering clients’ services as we seek to balance on- and off-site work.

Afternoon

On your own. See page 6-7 for some activity options that you can arrange through the hotel.

Dinner

On your own. Informal coordination on-site.



Sunday, July 18, 2010

8:00 – 9:15 am

Panel Session: **“So What?” What Does It All Mean for Our Clients, Our Practices, Our Business?**

Moderator: Nancy L. Raybin, Managing Partner, Raybin Associates

Panelists: William L. Carlton, Chairman and CEO, Carlton & Company
Peter J. Fissinger, President, Campbell & Company
Jack Miller, President & CEO, Miller Group Worldwide

A panel of leaders of Giving Institute firms will discuss the practical application of all we have learned over the past two days about the new environment in which we are working.

9:15 – 9:30 am

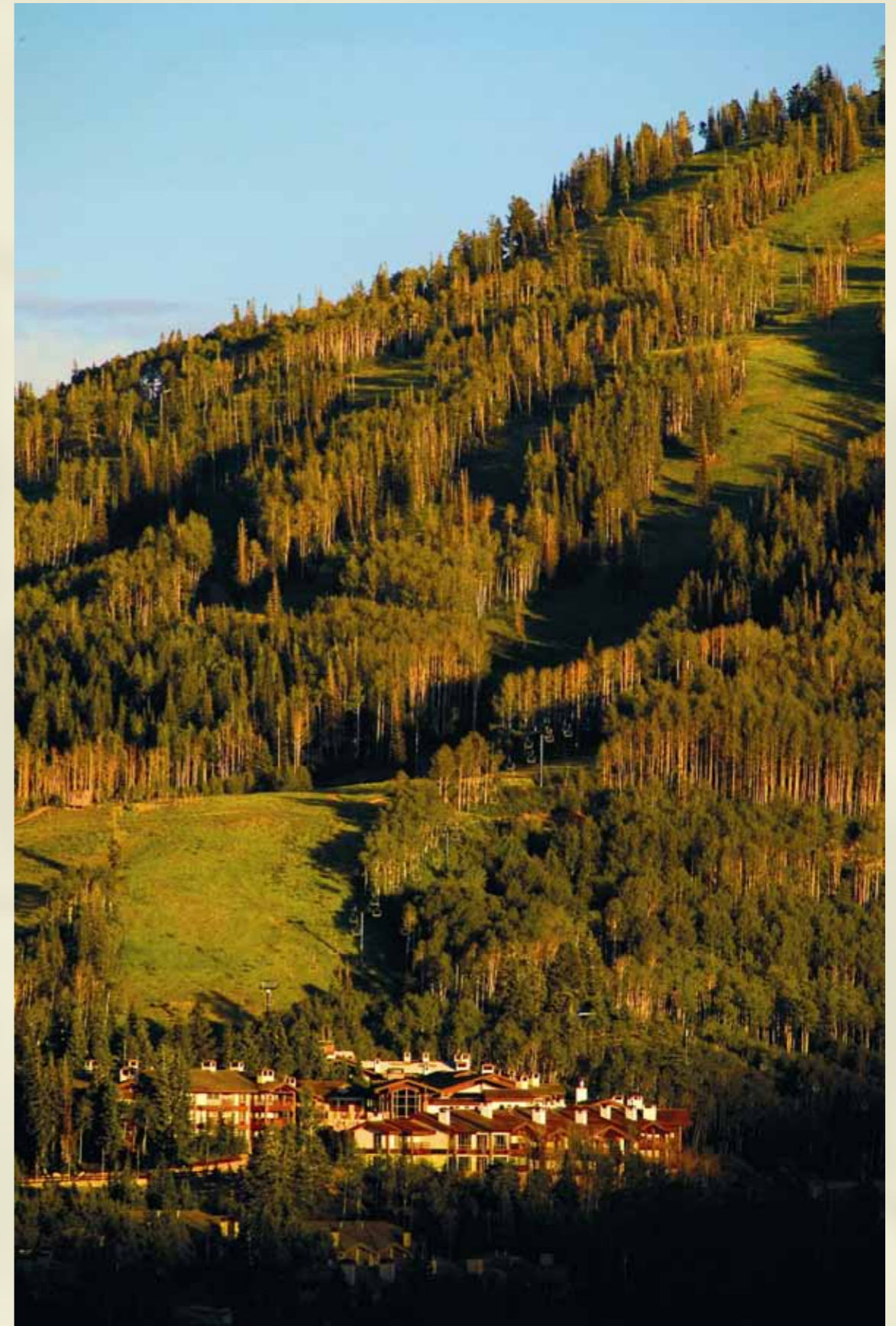
Break

9:30 – 10:45 am

Session: **Summer Symposium Wrap-up and Discussion**

Speaker: Paul C. Light, Ph.D.

Dr. Light will share his observations and conclusions about all that he has heard in his time with us. Have our discussions changed his thinking in any way? Are there new avenues of research he now plans to pursue? Where does he think we have the opportunity to exercise our leadership position in the field to create a different future for the nonprofit sector?



Optional Activities offered by Stein Eriksen: (Call 435-649-3700 to arrange)

Airplane rides

Scenic and aerobatic airplane rides are available out of Heber Valley Airport. Experience the beauty of the Wasatch Mountains, Park City, Heber Valley, Mt. Timpanogos, Provo Canyon, and several local ski resorts from a bird's eye view. You may also choose the unique experience of the aerobatic flight. Three cameras will video record the flight.

ATV Adventures

Take a guided 4-wheeler tour or you can rent your own. Guided ATV tours are available for single or double riders. You will follow guided trails into open meadows where you will be able to set your own pace. If you choose to go non-guided the rental will include the delivery to and from the destination trail head.

Fly-Fishing

Enjoy a half or full day with a professional guide on the Provo River. The guide will provide transportation, equipment rental, and lunch. The Provo River is rated in the top ten trout streams in America, boasting close to 3,000 wild fish per mile.

Glider Rides

Enjoy an exhilarating 30-minute ride exploring ridges, valleys and Mt. Timpanogos in a glider plane.

Golf

Play one of several mountain courses in the Park City vicinity. Park City offers many well renowned courses within 20 minutes of the lodge. Stein Eriksen Lodge is affiliated with the Promontory Ranch Club, and Park Meadows Country Club. There are also many excellent public courses in the surrounding area including the Wasatch Mountain State Park, Homestead Resort, Soldier Hollow, and the Park City Municipal Course.

Hiking

Miles of scenic trail await hikers of all ages and ability levels with breath taking views, wildflowers, and wildlife. You can ride the chairlift up and stroll through the aspens or take a guided hike into the Uinta Mountains.



Horseback Riding

Experience a guided horseback ride right outside the back door through the aspens. Horseback riding is also available in other beautiful locations surrounding Park City.

Hot-Air Balloon Rides

Peaceful one-hour and half-hour rides are available every morning (weather permitting) over beautiful Park City. The ride includes a light breakfast and a champagne toast.

Optional Activities (continued)

Lake Fishing

Take the opportunity to go on a guided fishing trip in one of Park City's nearby reservoirs. Trout, bass, walleye, and tiger muskie are a few of the types of fish you may catch. Spectacular scenery and opportunities for wildlife viewing as well as excellent fishing are abundant. Half days and full days are available.

Mountain Biking

You can walk right out the back door, ride the chairlift up, and mountain bike down one of Stein Eriksen's many trails. We also offer mountain bike rentals in the lodge. Mountain bike tours and lessons are also available in Park City and surrounding areas.



Park City Mountain Resort

Alpine Slide — Slide on a sled down 550 vertical feet on over 3,000 feet of track.

Climbing Wall — Test your climbing ability on PC Mountain's climbing wall.

Diggler Scooters — Hang on going down the mountain on this heavy-duty scooter.

Childrens Activities Include: The Legacy Launcher Trampoline, Miniature Golf, Human Maze, and the Little Miner's Park Amusement Rides.

River Rafting and Kayaking

Relax and have fun as you float down the Weber River or the Provo River. Both rivers offer mild rapids and breathtaking scenery. You can raft for two hours or a half-day with lunch included.

Rock Climbing

You will be introduced to top rope rock climbing with several pitches to climb from beginner to intermediate. The Uintah Mountains and the Cottonwood Canyons offer exciting climbs with beautiful scenic views in all directions. This is a full day outing with lunch included.

Utah Olympic Park

The Olympic Park hosted 14 medal events at the 2002 Winter Olympic Games. The park offers tours, bobsled rides, and zip cord rides. You can also observe the athletes in training daily and certain days they have special events. Special spectator events include the Saturday Freestyle Aerial Shows at noon beginning the middle of June through the end of August. This is a 30-minute spectacle as freestyle skiers soar into the air, twisting and turning before landing in the 750,000-gallon splash pool.



Water Activities

Wake boarding, jet skiing, water skiing, and sailing can be taken advantage of in local reservoirs located approximately 20 minutes away. Wake boarding clinics are available in morning and afternoon sessions. Jet ski, boat, and equipment rental are available at the marinas. Advanced reservations are suggested.

For more information on these and other activities visit www.steinlodge.com

Hotel and Travel Information

Hotel Information

Giving Institute has selected Stein Eriksen Resort to host the 2010 Summer Symposium. Located just 45 minutes from the Salt Lake City International Airport, and just a short distance from historic Park City, Stein Eriksen Lodge is a full service, 5 Star/5 Diamond hotel nestled in the Wasatch mountain range.

A block of rooms for Giving Institute Summer Symposium attendees has been reserved at the special conference rate of \$210, plus tax. The cut-off date for this special rate is 5 p.m. Mountain Standard Time, Friday, June 11, 2010. The blocked rooms may sell out prior to the cut-off date so be sure to call early to be assured a room at the conference rate.

To make your hotel reservations call the Reservations Department at 800/453-1302. Please advise the reservations agent that you are attending the Giving Institute Summer Symposium to receive the special conference rate. Payment of one night's room and tax must be provided upon making room reservations. Based on room availability this group rate may be available three days before, and three days after, the official meeting dates.

Cancellation Policy:

Stein Eriksen has a strict cancellation policy: up to 14 days prior to arrival, you will be charged the first night's room and tax. Cancellations made between your arrival date and 13 days prior will be charged the full amount of the reservation. There are no exceptions.

Stein Eriksen Lodge
770 Stein Way
Park City, UT 84060
435/649-3700 (Main Hotel #)
800/453-1302 (Reservations)
435/649-5825 (Fax)

Resort amenities include:

- High-speed Internet in the guest rooms
- Complimentary nightly turn-down service
- Full-service business center
- Fitness room and outdoor heated pool and Jacuzzi—complimentary to guests
- The Spa at Stein Eriksen—a full-service spa
- Complimentary in-town shuttle
- Daily newspaper
- Award-winning Glitretind Restaurant, open for breakfast, lunch, and dinner
- Complimentary local/800 calls
- Troll Hallen Lounge, which overlooks Deer Valley's mountains
- VCR/DVD player in each room



Airline Travel Information UNITED

United Airlines is offering special meeting discounts for attendees of the Giving Institute Summer Symposium. Simply call (or have your travel agent call) our Special Meeting Desk at 1-800-521-4041 and refer to Meeting ID Number 550KO to receive a 2 – 15% discount off applicable fares. If you purchase your ticket at least 30 days prior to travel, you will receive an additional 5% discount (on most classes of service). This special offer applies to travel on domestic segments of all United Airlines and United Express flights.

To purchase your ticket online, visit www.united.com and receive a 5% discount off the lowest applicable fares. After you link to www.united.com, enter your origin and destination, travel dates, and your promotion code number 550KO; available flights will be displayed. Flights that qualify for the discount will be clearly identified with a red star symbol, which means that the itinerary is "electronic certificate eligible." When you select an electronic certificate eligible flight, United will automatically calculate and present your discounted fare. This special offer applies to flights to or from the US only. There are no fees for booking online. Note that Code 550KO is case-sensitive and the characters need to be capitalized. To check schedules and to take advantage of this offer, please visit www.united.com or call 800/521-4041.

By Car

From the Salt Lake City International Airport, follow signs for I-80 East toward Cheyenne, WY. Remain on I-80 East traveling approximately 20 miles up Parley's Canyon, until you reach Park City exit 145 (Highway 224). Turn right off the exit and proceed approximately 5 miles into Park City. At the Deer Valley Drive intersection, turn left. Follow through one set of lights. The road will come to a roundabout; turn right onto Marsac Avenue toward Guardsman Pass, Highway 224. Follow Highway 224 for approximately 2 miles. Turn left at the green Silver Lake sign and go up the steep hill. At the stop sign turn right onto Royal Street. Take the third right at the Stein Eriksen Lodge sign onto Stein Way. Stein Way will open up to the arrival lobby of the Lodge. The bell staff will be present to greet guests at the arrival lobby and escort guests to their rooms. Shuttle service also is available from the airport.





2010 Giving Institute Summer Symposium Registration Form

July 15–18 • Stein Eriksen Lodge • Park City, UT

Name _____ First Name for Badge _____ Credentials _____
 Firm _____ Mailing Address (Work) _____
 City/State/Zip _____
 Phone (Work) _____ Fax (Work) _____ E-mail (required) _____
 In case of emergency, please contact: Name _____ Phone _____
 To register, make your selections in the boxes below, add subtotals in boxes A & B and indicate the total amount in Box C

Registration Rates

Member Early Bird	(M) <input type="checkbox"/>	\$1,050	A
Additional Member from same firm	(MA) <input type="checkbox"/>	\$850	
*Nonmember	(N) <input type="checkbox"/>	\$1,350	
Nonmember from same firm	(NA) <input type="checkbox"/>	\$1,100	

All registrations postmarked after May 28, 2010 (LF) \$100 each attendee
 *Nonmember firms may attend two consecutive Summer Symposia at a discounted rate.
 If you have attended two or more Summer Symposia, please contact Giving Institute.

Subtotal A \$ _____

Spouse/Guest/Meal Plan

Each registrant may purchase Spouse/Guest or Child meal tickets, where desired. **B**

Meal Plan/Adult

<input type="checkbox"/> Thursday Dinner (AMP1)	(\$125)	No. of Tickets _____
<input type="checkbox"/> Friday Lunch (AMP2)	(\$50)	No. of Tickets _____
<input type="checkbox"/> Friday Dinner (AMP3)	(\$125)	No. of Tickets _____

Meal Plan/Children

<input type="checkbox"/> Thursday Dinner (CMP1)	(\$25)	No. of Tickets _____
<input type="checkbox"/> Friday Lunch (CMP2)	(\$25)	No. of Tickets _____
<input type="checkbox"/> Friday Dinner (CMP3)	(\$25)	No. of Tickets _____

Name(s) of guest _____

Subtotal B \$ _____

(Please review your registration form prior to completing this box.)

Total Amount (Boxes A+B) _____ **C**

Special Request (SDV) I will need vegetarian meals.

3 Easy Ways to Register

Mail
 Giving Institute
 PO Box 839
 Glenview, IL 60025-0839

Phone
 847/375-4709

Fax
 888/374-7258

Payment

    Check enclosed

- Make check payable to Giving Institute.
- If rebilling of a credit card is necessary, a \$25 processing fee will be charged.
- I authorize Giving Institute to charge the above listed credit card amounts reasonably deemed by the Giving Institute to be accurate and appropriate.
- Checks not in U.S. funds will be returned
- A charge of \$20 will apply to checks returned for insufficient funds.

Account Number _____ Expiration Date _____

Signature _____

Cardholder's Name (please print) _____

Cancellation, Program Changes and Refund Policies

All cancellation requests must be in writing and will be assessed a 10% cancellation fee. No refunds will be made on cancellations postmarked after July 9, 2010. Any substitutions or transfer requests are subject to approval of Giving Institute. If Giving Institute must cancel the meeting, registrants will receive full credit or refunds of their paid registration fees.