



NATIONAL TRUST FOR HISTORIC PRESERVATION®

THE BUCK
STARTS
HERE

FUNDRAISING FOR SMALL PRESERVATION NON-PROFITS

NOVEMBER 7-8, 2011

Stoughton Opera House and City Hall Stoughton, Wisconsin

This workshop, held in collaboration with the Wisconsin Historical Society and Wisconsin Main Street, is designed to help Board members and Executive Directors address fundraising issues in their organizations. Nationally-recognized experts and local authorities will help you create and execute a complete fundraising plan. Sessions will focus on how to get your organization ready to fundraise, raise money for annual operating costs, and successfully undertake a capital campaign. Come and get ready to implement your plan from membership development to asking for gifts from major donors.

WHO SHOULD ATTEND?

At least two or more Board members, along with Executive Directors where available, of small preservation non-profits, Main Street organizations, historical societies, house or living history museums.

The conference will take place at the Stoughton Opera House & City Hall in Stoughton, Wisconsin. See Stoughton Opera House website for a map and parking suggestions.

Hotel accommodations have been reserved with a block of rooms at the Quality Inn & Suites - Stoughton (www.qualityinn.com/hotel-stoughton-wisconsin-W1075) for the nights of November 6-7, 2011. You may reserve your sleeping accommodations at a cost of \$79.99 + tax by calling the hotel directly at (608) 877-9000. To get this special rate, you need to mention that you are associated with the National Trust for Historic Preservation's workshop, *The Buck Starts Here: Fundraising for Small Preservation Non-Profits*. Please make your reservations as soon as possible but we will hold the room block until **Saturday, October 15, 2011**.

The seminar cost is \$50 per person. Scholarships for eligible participants are available.

All seminar information, including an electronic registration form and scholarship information, can be found at www.wisconsinhistory.org/localhistory/workshops. If you have questions, contact the Midwest Office of the National Trust for Historic Preservation at mwro@nthp.org or 312-939-5547, ext. 37229.

SPONSORED BY:

The National Trust for Historic Preservation – Midwest Office

CO-SPONSORS:

Wisconsin Historical Society – Division of Historic Preservation-Public History (www.wisconsinhistory.org/hp)

Wisconsin Main Street (www.commerce.state.wi.us/cd/cd-bdd.html)

This event is generously underwritten by the Jeffris Family Foundation of Janesville, Wisconsin, www.jeffrisfoundation.org

AGENDA

SUNDAY, NOVEMBER 6

- 5:00-7:00** **Registration Open**
- 6:00-7:30** **Opening reception**
The Pour House (no host cash bar)
- 7:30-** **Dinner On Your Own and Open Discussion**
(Please note that the dinner is not included in the cost of registration)

2:00-3:15

Annual Operating Funding

Terry Thiessen, President, New Holstein Historical Society

3:15-4:15

Break

Exercise: Create a fundraising action plan

4:15-5:00

Jeffris Family Foundation Funding

Frank Butterfield, Director, Wisconsin Field Office,
National Trust for Historic Preservation

5:00-6:00

Free time

6:00-7:00

Reception (location to be determined)

7:30

Dinner on your own

MONDAY, NOVEMBER 7

- 7:30-9:00** **Breakfast round table discussions**
- 9:00-9:15** **Welcome**
Genell Scheurell, Senior Program Officer,
National Trust for Historic Preservation,
Midwest Office
- 9:15-10:00** **Understanding Fundraising**
Jodi Bender Sweeney,
The Sweeney Group
- 10:00-10:45** **Exercise:** Assessment-Where is your
organization in the fundraising process?
- 10:45-12:00** **Break**
- 10:45-12:00** **Preparing the Organization for Fundraising**
Joan Flanagan, Fundraising Consultant
and Trainer
- 12:00-12:30** **Exercise:** Create a membership
development plan
- 12:30-2:00** **Lunch**
- 12:45-1:45** **Case Studies:** How a successful organization
has done it
Donna Arnetveit, Temple Theatre, Viroqua

TUESDAY, NOVEMBER 8

7:30-9:00

Breakfast round table discussions

9:00-9:45

Capital Campaigns - Preparation Makes All the Difference
Jodi Bender Sweeney, The Sweeney Group

9:45-10:30

Exercise: Draft case statement from perspective of donor

10:30-11:15

Break

11:15-12:00

Capital Campaign - Asking for Major Gifts
Jodi Bender Sweeney, The Sweeney Group

11:15-12:00

Exercise: Write up and role play making an ask

Noon-1:15

Lunch - Ask the Donor Panel

Sunny Fischer, Executive Director, The Richard H. Driehaus
Foundation, Chicago

Tracey Shafroth, Lead Strategist, Field Museum of Chicago

Fred Mohs, Attorney, Preservationist, Philanthropist, Madison

1:15-2:00

Exercise: Create your organization's final documents

2:00-2:15

Wrap Up

Royce Yeater, Midwest Director

National Trust for Historic Preservation, Midwest Office

SPEAKERS

Donna Arnetveit Temple Theatre, Viroqua, WI is a community activist, volunteer and historian. She helped lead the million dollar fundraising effort for the Temple Theatre restoration.

Jodi Bender Sweeney President of The Sweeney Group, Madison, WI, a firm that counsels nonprofits on a full range of resource development needs; it is noted for its work with historic preservation organizations that are embarking on their first capital campaigns.

Frank Butterfield Director, National Trust for Historic Preservation, Wisconsin Field Office, Lake Mills, WI. Formerly a scientist at Boston College, Frank completed graduate studies in historic preservation at the School of the Art Institute of Chicago and joined the National Trust in 2009.

Sunny Fischer Executive Director of The Richard H. Driehaus Foundation, Chicago, IL, which makes grants primarily to organizations working to enhance the urban environment with a focus on architecture and design. She has been on the jury for the National Trust for Historic Preservation's Annual Preservation Awards and served on the Board of the Graham Foundation. She is now the Board Chair for the Illinois State Historic Preservation Agency.

Joan Flanagan Chicago, IL is a fundraising consultant, educator and preservationist. She is the author of the best-sellers *The Grass Roots Fundraising Book* and *Successful Fundraising*. Currently, she is part of the \$4 million Capital Campaign Committee for the 1888 Episcopal Church of Our Savior in Chicago.

Fred Mohs, Madison, WI is a real estate attorney, preservationist and philanthropist. He is a partner in the law firm of Mohs, McDonald, Widder & Paradise, a former member of the Wisconsin Board of Regents, and co-founder of Capitol Neighborhoods, Inc.

Tracey Shafroth Chicago, IL is the Lead Strategist in the Environment, Culture and Conservation Division at the Field Museum of Chicago and a member of the Strategic Advisory Board of the Grand Victoria Foundation. She has also worked with the Frances and Elliot Lehman Foundation, the Crown Family Foundation and as the Executive Director of the Prince Charitable Trusts in Chicago, Rhode Island and Washington, DC.

Terry E. Thiessen President of the New Holstein Historical Society, New Holstein, WI is a professional community advocate and service volunteer having been involved in non-profit charitable organization leadership for more than 40 years.

NAME/TITLE

ORGANIZATION

ADDRESS

CITY STATE ZIP

EMAIL ADDRESS

NUMBER OF PEOPLE AT \$50 PER PERSON = \$

NAME(S) AS IT SHOULD APPEAR ON BADGE:

LAST FIRST

(If more than one person is being registered using this form, please attach the list of names as they should appear on badges.)

BILLING CONTACT NAME

Please charge my registration fees to my credit card:

Visa MasterCard American Express Discover

ACCOUNT NUMBER EXP. DATE

SIGNATURE

REGISTRATION FORM

Please make checks payable to: National Trust for Historic Preservation – Midwest Office
To register and charge your registration fees to your credit card, go online to
www.wisconsinhistory.org/localhistory/workshops.

I am also applying for a seminar scholarship. I understand that I am to pay the full registration fee at this time. If selected and I meet all the scholarship requirements, I will receive a reimbursement check at the conclusion of the workshop.

PLEASE CHECK THE CATEGORY BOX:

- Historic Preservation Non-Profit Staff/Volunteer Historic Preservation Non-Profit Board Member
 House Museum Non-Profit Staff/Volunteer House Museum Non-Profit Board Member
 Architect Consultant
 Student (Degree) _____
 Other Preservationist _____

PLEASE CHECK BELOW IF YOU HAVE ANY SPECIAL REQUIREMENTS.

- Special Assistance (describe) _____

Please mail or fax this form with payment to:

National Trust for Historic Preservation – Midwest Office
53 West Jackson Blvd, Suite 350, Chicago, Illinois 60604

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