

Strategies for Dynamic Foundations

This two-day seminar will provide timely information on marketing and administering a diocesan foundation. If your diocese already has a foundation, you will learn how to make yours stronger. If you are considering starting a foundation, you will learn about the benefits and challenges of a foundation.

The seminar will begin on Saturday, 11 October 2008 at 1:00 p.m. and conclude Sunday, 12 October 2008 at 3:15 p.m.

Separate registration for the Seminar for Catholic Foundations is required. The registration fee is \$350. Please contact the ICSC office or visit: www.catholicstewardship.org to register.



INTERNATIONAL CATHOLIC STEWARDSHIP COUNCIL

1275 K Street, NW, Suite 880
Washington, DC 20005-4077

Telephone: (202) 289-1093
Toll Free: (800) 352-3452
Facsimile: (202) 682-9018

Email: icsc@catholicstewardship.org
Website: www.catholicstewardship.org



INTERNATIONAL CATHOLIC STEWARDSHIP COUNCIL



2008 Seminar for Catholic Foundations

October 11-12, 2008

Hyatt Regency Chicago Hotel

Chicago, Illinois



Outstanding Speakers

Outstanding speakers will share their expertise in Catholic Foundations and planned giving. You will learn about creative ways to enhance your program with practical ideas and proven methods.

Samuel D. Caldwell
President
The Planned Giving Company, LLC
Media, Pennsylvania

Barry C. Hawkins
Shipman & Goodwin LLP
Stamford, Connecticut
Uniform Law Commission

Mark Conzemius
President and Executive Director
Catholic Foundation for Eastern
South Dakota

Thomas P. Scholler
Interim Director of Development
Archdiocese of Detroit, Michigan

Jennifer A. Damiano
Executive Director
The Catholic Foundation
Diocese of Columbus, Ohio

John A. Scola, CFRE
President
Orange Catholic Foundation
Orange, California

James Edwards
Director
Catholic Family Foundation
Archdiocese of Baltimore,
Maryland

Sandra J. Sebring
Administrative Director
Catholic Foundation of Rhode
Island, Diocese of Providence

J. Richard Ely, Jr.
Strategic Fundraising Consultants
Providence, Rhode Island

Bette Theobald
Vice President and Director of
Planned Giving
Catholic Foundation for Eastern
South Dakota

Program Schedule

SATURDAY, OCTOBER 11, 2008

1:00 p.m. – 1:15 p.m.
Welcome, Opening Remarks and Request Questions
for Open Forum

Thomas P. Scholler

1:15 p.m. – 2:30 p.m. Session 1
Results of 2008 Planned Giving and Foundations Best
Practices Survey / Model Diocesan Foundation Presentation

2:30 p.m. – 2:45 p.m. Break

2:45 p.m. – 4:00 p.m. Session 2
Legal Issues, Fiduciary Responsibilities of Foundation
Management and the Uniform Prudent Management of
Institutional Funds Act

Barry C. Hawkins and Thomas P. Scholler

4:00 p.m. – 4:30 p.m.
Personal Introductions, Closing Remarks and Adjourn
for the Day

SUNDAY, OCTOBER 12, 2008

8:00 a.m. – 9:00 a.m.
Mass

9:00 a.m. – 9:15 a.m.
Opening Remarks

Thomas P. Scholler

9:15 a.m. – 10:15 a.m. Session 3
Establishing and Marketing Donor Advised Funds –
Implications of the 2006 Pension Protection Act

Jennifer Damiano and John A. Scola

10:15 a.m. – 10:30 a.m. Break

10:30 a.m. – 11:30 a.m. Session 4
Fasten your Seatbelt: A Revolutionary New Paradigm for
Deferred Giving Campaigns

Samuel D. Caldwell and James Edwards

11:45 a.m. – 12:30 p.m. Lunch

12:30 p.m. – 1:30 p.m. Session 5
Managing Donor Relationships from the Donor's Perspective

Mark Conzemius and Bette Theobald

1:30 p.m. – 1:45 p.m. Break

1:45 p.m. – 2:45 p.m. Session 6
Funding the Growth of the Development Office and
the Foundation.

J. Richard Ely, Jr. and Sandra Sebring

2:45 p.m. – 3:15 p.m.
Open Forum, Closing Remarks and Adjourn to
ICSC Conference

Registration Form (Please complete one form per registrant)

Name _____

Title _____

Organization _____

Address _____

City _____

State/Province _____ Postal Code _____

Country _____

Phone (_____) _____

E-mail _____

Registration Fee

\$350

Method of Payment

Check (Make checks payable to ICSC)

MasterCard VISA

Account Number _____

Expiration Date ___/___ CW _____

Authorized Name _____

Billing Address _____

Signature _____

Return To

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Washington, DC 20005-4077

Fax: (202) 682-9018

Housing and Travel Information

Hotel reservation and discount airfare information are available on the ICSC website and in the 2008 Conference brochure. Please contact ICSC for a brochure.