



*Citizen leaders, organizations and communities  
come together at the*

# Brushy Fork Annual Institute

*to explore issues and solve problems*

September 21-23, 2011  
with Early Bird Sessions on September 20

Berea College, Berea, Kentucky

Get hands-on training and personal attention in unique workshop tracks.

Hear new ideas and explore regional issues.

Connect with other people and organizations that are working to improve life in Appalachian communities.

## 2011 Annual Institute Preliminary Agenda

Tuesday, September 20 (optional)  
1:00 pm Early Registration  
2:00 pm Early Bird Sessions (3 hours)  
5:30 pm Dinner

Wednesday, September 21  
7:30 am Breakfast  
8:00 am Registration  
9:00 am Opening Plenary  
10:30 am Track Sessions  
*(Lunch in Track)*  
5:00 pm Tracks Adjourn  
5:30 pm Dinner  
6:00 pm Caucuses (optional)

Thursday, September 22  
7:30 am Breakfast  
8:30 am Track Sessions  
11:00 am Keynote Presentation  
12:30 pm Lunch  
2:00 pm Track Sessions  
5:30 pm Tracks Adjourn  
5:00 pm Dinner

Friday, September 23  
7:30 am Breakfast  
8:30 am Hammin' & Jammin'  
9:30 am Track Sessions  
12:30 pm Lunch & Closing Plenary  
2:00 pm Adjourn

**What's New  
This Year?**  
Keynote: Our Wealth | Our Future  
*Community Development Philanthropy*  
New Track: Community Foundations  
Learn more inside...



Register online at  
[www.brushyfork.org](http://www.brushyfork.org)

# 2011 Annual Institute Workshop Tracks

**Selecting a Track:** Participants follow one track throughout the Annual Institute. On your registration form, select a first and second choice track from the listings. Tracks have a limited capacity, so register quickly! Save time and register online at [www.brushyfork.org](http://www.brushyfork.org)!

## **NEW!** Community Foundations: Gerry Roll

Appalachian communities have local resources that might be brought to bear on the challenges facing education, economic development, health care and other issues. Capturing these resources is critical to undertaking local, sustainable work to improve quality of life for all residents. Community foundations are a tool through which many communities have developed local philanthropy. This track explores community foundations as tools for community development and examines options for developing one for your community. *Limit 20.*

## Vaughn Grisham's Three Rs Plus for Community Development Teams

This track **requires** a team of three to four people from one community. The sessions draw on Dr. Grisham's forty years of research in successful communities to learn the process and key elements in their triumphs. Participants will hear how these small, rural communities achieve extraordinary results with no unusual resources. They will work to apply these principles to their communities and develop strategies to improve their own places. Call Brushy Fork for more information on teams. *Limit 8 community teams (approximately 30 people).*

## Appalachia's Economic Future: Justin Maxson

Even as the economic recovery begins to gain momentum, Appalachia may be left behind again unless we develop our own plans for progress. Communities need to explore ways to grow existing businesses while generating a climate that supports new enterprises. Food, energy, tourism, health care, and a host of other areas are ripe for innovation. This track is a thinktank for local leaders and experienced practitioners to develop promising ideas and recommendations for communities. *Limit 20.*

## Fundraising Beyond Grants: Lee Ellen Martin

Why is it so hard to get around to asking people for money? How can your great project produce more funding? Join this session to make plans to stabilize your organization's contributed revenue streams. Through discussion and practical activities, participants will work on case statements, prospect identification, solicitation techniques, relationship building and donor communications. Group discussions will also help participants find strategies for funding for difficult projects and hard to solicit prospects. *Limit 20.*



## Grantwriting: Christy Bailey

Take the mystery out of researching grants and crafting successful proposals. Christy Bailey, Executive Director of the Coal Heritage Highway Authority, will lead you through the research process and initial contact with a funder. Learn to write a winning proposal from describing the work it will address in your community to creating the budget. Each participant will receive a comprehensive proposal writing manual created by the presenter. *Limit 30.*



## Financial Management for Nonprofits: Ed McCormack

This track provides hands-on casework for people charged with developing a nonprofit accounting system. Ed McCormack, Professor of Economics and Business, will lead you through the creation of a QuickBooks© system of accounting, process a month of transactions, prepare financial reports and work with budgets. You will leave the track with a written guide to accounting for nonprofits using QuickBooks©. *Limit 10.*

## More Workshop Tracks

### Nonprofit Management: Ginny Ann Blackson

This track will help participants learn about building a strong “back office” for nonprofit organizations—the records, policies and processes that help keep nonprofits healthy for the mission work. The track will be beneficial for staff involved in the overall management of a nonprofit organization, especially those who may be new to their role as a manager. Topics will include record keeping (what to keep and how to organize it), systems for personnel management, and records and training for boards of directors. *Limit 20.*

### Legal Issues for Nonprofit Organizations: Conley Salyer

Attorney Conley Salyer builds on his years of experience working in the nonprofit sector to present highly interactive sessions addressing four areas of concern for nonprofit organizations: profit-oriented activities, fundraising, common day-to-day mistakes (humorous and not so funny), and aggressive but legal lobbying. Using a combination of informative short presentations followed by group discussions, this workshop will put you on the right track regarding legal issues. *Limit 12.*

### Wicked Problems: Strategy Making for Senior Leaders: David Sawyer

The curriculum for this track is unique: serious work on actual challenges and opportunities that you—as a senior leader—are facing. Designed for executives seeking excellence in any field, past attendees have included mayors, nonprofit directors, entrepreneurs, and senior leaders in government. Join an intimate group of leaders in a lively process of peer learning, analysis, and problem solving. Strengthen your ability to think strategically and sensitively about complex internal and external issues. Leave with allies, tools and plans for the future. Confidentiality and candor are a must. *Limit 10.*

### Leadership Development: David Cooke

Serving as a community leader has its rewards but it can also be an exhausting endeavor. How can grassroots and organization leaders hone skills which enable effective leadership? This track offers sessions to build skills and inspire new perspectives about providing leadership to communities and organizations. From running effective meetings to understanding how different personality styles interact in leadership situations, participants explore aspects of leadership skills. Each participant creates a personal leadership development plan to encourage practicing some of the new skills. *Limit 20.*



#### TRACK FAQs

##### 1. What is a track?

A track consists of thirteen hours of intensive training on a topic. Participants stay in one track for the duration of the Institute.

##### 2. Can I participate in more than one track?

No. Sessions in each track are closely integrated and you will miss valuable sessions if you move among tracks.

##### 3. Why must I indicate a first and second track choice?

Track numbers are limited and some tracks may be full when you register. We will notify you if your first choice is not available.

#### Register Today!

Get the track you want; don't delay! Complete your registration form and return it to Brushy Fork Institute with payment. You may download track information and additional registration materials at: [www.brushyfork.org/annualinstitute](http://www.brushyfork.org/annualinstitute).

#### Registration Fee

The Annual Institute registration fee is \$500. Those taking the Digital Storytelling track also pay a \$100 lab fee for a total fee of \$600.

#### What the Fee Covers

The registration fee covers all workshop sessions and materials, early bird sessions, all snacks and all meals. A light continental breakfast will be served each morning. The fee does not include lodging.

#### About Lodging

Participants are responsible for their own lodging. The following hotels are in Berea.

#### Hotels

Boone Tavern Hotel 859-985-3700  
Comfort Inn 859-985-5500  
Fairfield Inn & Suites 859-985-8191  
Country Inn & Suites 859-228-0340

## More Workshop Tracks

### Effective Communication by Choice: Steve Kay

Effective Communication by Choice is an approach to communication that provides practical ways to handle both ordinary and challenging communication. Based on the Authentic Partnership™ model, this approach increases the chances that communication will be effective, and that helpful intentions will translate into good relationships. The workshop provides participants guided practice in applying the approach to authentic situations. Guided practice with individual feedback constitutes the balance of the workshop. Participants in the workshop analyze their present interactions and develop practical options for dealing with both ordinary and challenging situations. *Limit 10.*



### Tools for Promoting Your Program or Issue: Anne Durham

Well-planned communications strategies are essential to promoting the good work of your organization or movement. They provide the spark that catalyzes your effort and keeps momentum high. This track explores recent and developing research about new communications tools that meet the unique needs of nonprofits and social causes. Learn about the psychology of design, how to understand a target audience, incorporating Web 2.0 tools into your strategies and integrating vision into marketing efforts. Participants leave the session with a strategic communications plan and tools. *Limit 30.*

### Web Site Development: Jan Pearce

This track provides skills for building and maintaining a basic web site for your organization. Jan Pearce of Berea's Mathematics and Computer Science Department will guide you through developing a web site plan and building it on your laptop or on one provided. Participants will use software that they can install and take back home. No experience in web design is needed. Be sure to bring brochures, text, logos and other images with which to create your site. *Limit 10.*

### Digital Storytelling with Carpetbag Theatre: a special extended track

The Carpetbag Theatre (CBT) uses the digital storytelling process to reveal hidden stories and to build community. This creative approach to storytelling gives power to the personal voice and employs facilitative teaching methods. Digital storytelling brings together cultural and technological tools to create a powerful medium of text, images and sound to present a story. Participants should come to the Digital Storytelling track with an outline for a 3-5 minute story and photographs and other images. The track leaders will provide the computer equipment and software. PLEASE NOTE: This track begins with an Early Bird Session on Tuesday from 2:00-5:00 pm and incurs a \$100 lab fee. *Limit 10.*





2011  
**Brushy Fork  
 Annual Institute**

September 20-23, 2011  
 On the campus of Berea College



**Registration Form**

**Step 1: Give us your contact information.**

Mr.  Ms. Name: \_\_\_\_\_

Title/Position in Organization: \_\_\_\_\_

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Mailing Address Line 2: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_ County: \_\_\_\_\_

Home phone: \_\_\_\_\_ Work phone: \_\_\_\_\_

Cell phone: \_\_\_\_\_ Fax number: \_\_\_\_\_

E-mail address: \_\_\_\_\_ Organization web site: \_\_\_\_\_

Emergency contact name and number: \_\_\_\_\_

Relationship of emergency contact: \_\_\_\_\_

**Step 2: Help us prepare to meet your needs at the Annual Institute.**

Please indicate the name you want on your nametag: \_\_\_\_\_

Please indicate any dietary restrictions you may have:

Diabetic     Vegetarian     Vegan     Other: \_\_\_\_\_

The Annual Institute is held on a college campus. Some walking may be necessary. Do you have any physical condition that might restrict your mobility or require assistance during the Institute?     Yes     No

Please explain: \_\_\_\_\_

**Step 3: Tell us which Early Bird Session you want to join.**

Will you attend an Early Bird Session from 2:00-5:00 pm on Tuesday, September 20? If so, please check one:

- Tools for Successful Policy Advocacy | Amy Hille Glasscock
- One-Page Strategic Plan | Peter Hackbert
- Managing Federal Grants | Conley Salyer
- Planned Giving | Lee Ellen Martin

**Tuesday dinner**

Will you attend the opening cookout on the evening of Tuesday, September 20?     Yes     No

**For Brushy Fork office use**

Date received \_\_\_\_\_ Date entered \_\_\_\_\_ ID number \_\_\_\_\_ Processed by \_\_\_\_\_

Comments:

Name: \_\_\_\_\_

### Step 4: Choose a workshop track to follow during the Annual Institute.

Each participant follows **one** track. Please indicate a first and second track choice. Tracks are subject to change based on registration numbers and other factors. Brushy Fork will notify you if you receive your second choice.

Track (please mark one first and one second choice)	First choice (check one)	Second choice (check one)
<b>NEW!</b> Community Foundations   Gerry Roll (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Nonprofit Management   Ginny Ann Blackson (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Legal Issues for Nonprofits   Conley Salyer (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Financial Management for Nonprofits   Ed McCormack (limit 10)	<input type="checkbox"/>	<input type="checkbox"/>
Vaughn Grisham's Three Rs Plus (limit 8 teams) (requires 3 to 4 representatives from a community, each registered on a separate form) List names of others: _____	<input type="checkbox"/>	<input type="checkbox"/>
Appalachia's Economic Future   Justin Maxson (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Effective Communication by Choice   Steve Kay (limit 10)	<input type="checkbox"/>	<input type="checkbox"/>
Strategy Making for Senior Leaders   David Sawyer (limit 10)	<input type="checkbox"/>	<input type="checkbox"/>
Leadership Development   David Cooke (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising Beyond Grants   Lee Ellen Martin (limit 20)	<input type="checkbox"/>	<input type="checkbox"/>
Grantwriting   Christy Bailey (limit 30)	<input type="checkbox"/>	<input type="checkbox"/>
Tools for Promoting Your Program or Issue   Anne Durham (limit 30)	<input type="checkbox"/>	<input type="checkbox"/>
Web Site Development   Jan Pearce (limit 10)	<input type="checkbox"/>	<input type="checkbox"/>
Digital Storytelling Extended Track   Carpetbag Theatre (limit 10) (begins with an opening session Tuesday, 2-5 pm)	<input type="checkbox"/>	<input type="checkbox"/>

### Step 5: Suggest a topic for a caucus at the Annual Institute.

Caucuses are informal discussions that will take place after dinner on Wednesday evening. We encourage participants to convene caucuses around topics of interest. Please make a suggestion below.

Caucus suggestion: \_\_\_\_\_ Are you willing to convene this caucus?  
 Yes  No

### Step 6: Return registration form with payment.

Registration is \$500. The fee covers Tuesday Early Bird Sessions and dinner, all plenary sessions, concurrent tracks, network activities, materials, and meals during the Institute.

Registration for the Digital Storytelling Extended Track is \$600, which includes a \$100 lab fee.

#### Payment type (check one)

1. Check or money order enclosed in the amount of \$ \_\_\_\_\_

Make checks payable to  
Brushy Fork Institute.

Or register online at  
[www.brushyfork.org](http://www.brushyfork.org)!

2. Credit card Card type:  Visa  Mastercard (Discover and American Express not accepted.)

Cardholder Name: \_\_\_\_\_ Credit Card Number: \_\_\_\_\_

3-digit V-Code (from back of card) \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Cardholder Phone: \_\_\_\_\_

Billing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

#### Please return registration form with payment to:

Brushy Fork Institute • CPO 2164, Berea College • Berea, KY • 40404  
859-985-3858 • Fax: 859-985-3903 • [www.brushyfork.org](http://www.brushyfork.org)

**Cancellation Policy:** We encourage substitution of participants rather than cancellation. If you must cancel:

• Cancellations received on or before September 2 are subject to a \$25 administrative fee.

• Registrants who cancel from September 2 through 12 will receive a \$200 refund and a \$200 credit toward registration for the 2012 Annual Institute.

• Cancellations after September 12 are not refundable, but \$200 will be credited toward registration for the 2012 Annual Institute.

Credits are not transferable.



## Keynote Presentation

# Our Wealth | Our Future

*Jeff Yost, Nebraska Community Foundation*

In the decades ahead, billions of dollars will flow out of central Appalachia, draining resources from already challenged communities. Successful communities will adopt strategies to capture these resources. Jeff Yost, President of the Nebraska Community Foundation, will share strategies that have made that community foundation a nationally recognized model for community development philanthropy. Jeff's presentations will be followed by a panel of regional practitioners who are applying innovative ways to promote locally-based philanthropy that can help build a brighter future for your community.

## Early Bird Sessions | Tuesday, September 20, 2:00-5:00 pm

### Tools for Successful Policy Advocacy

*with Amy Hille Glasscock*

Amy Hille Glasscock has spent the last seven years working in Washington DC, first as a congressional staffer and now as a registered lobbyist. Come get the inside story on how to be a successful advocate for your community, organization or cause. Learn about the best ways to communicate with elected officials; how to get your congressional representative's attention; why committees matter; how to get staffers to take on your issue; when to work through your district office; and when to take your case to Capitol Hill.

### Planned Giving *what is it, who does it and how do we get started*

*with Lee Ellen Martin*

Considering implementing a planned giving program and feeling like you don't know where to start? This session will explain the different types of planned giving, how to integrate it into your development program and which donors might be interested.

### One-Page Strategic Plan *a quick and easy approach*

*with Peter Hackbert*

Do you find the task of developing a strategic plan for your organization to be daunting? This session provides a quick and easy technique for developing a one-page plan that expresses your organization's vision and mission, sets objectives, outlines strategies and describes action plans.

Led by Peter Hackbert of Berea College's program, Entrepreneurship for the Public Good, the session is designed to give you a starting place to pull together staff and board in the strategic planning process. The session will get you started on the one-page plan. You will leave with templates and worksheets to help you carry forward the strategic planning process in your organization.

### Managing Federal Grants

*with Conley Salyer*

So you were awarded a federal grant; now, how do you manage it? This session provides an overview of the requirements for managing federal assistance awards, including:

- a. What governs assistance awards?
- b. What is the Common Rule?
- c. What authority does your Agency Grant Officer have?
- d. When are prior approvals required for changes to assistance?
- e. What are ethical requirements?
- f. How do you track and report program income?
- g. What are procurement and financial system requirements?
- h. How stringent are progress and financial reporting deadlines?
- i. When can an award be suspended or terminated?
- j. What are audit requirements?
- k. What are rules for record retention?

**SPECIAL! Preconference consulting:** Do you need a little guidance for your development program? Development professional Lee Ellen Martin, CFRE, will be available for one-on-one (or with your group) consulting before the Early Bird Sessions begin on Tuesday and after the Institute ends on Friday. Contact her at [leeellen@insightbb.com](mailto:leeellen@insightbb.com) for specifics on this opportunity.



**Brushy Fork Institute**  
CPO 2164, Berea, KY 40404  
859-985-3858 | [www.brushyfork.org](http://www.brushyfork.org)

## BRUSHY FORK ANNUAL INSTITUTE September 20-23, 2011 | Berea College

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Register online at [www.brushyfork.org](http://www.brushyfork.org)  
or call 859-985-3858 today.