CONFERENCE PROGRAM

Wednesday, September 19, 2012

Keynote Speaker: 9:30 a.m. - 10:45 a.m.

Transformational (not Transactional) Philanthropy

Description: Ms. Dietlin’s presentation, Transformational (not Transactional) Philanthropy, will focus on her work with philanthropists, including entrepreneurs, who are working to make a difference. Through it she will share insights on one of her favorite topics! It is Dietlin’s contention that most individuals want to do something to change the world and she believes philanthropy is one of the strongest methods they use to accomplish their goals. Sharing the history of philanthropy as well as her own work and unique approach, the audience will learn how to seek out, engage and sustain donor relationships. Lisa will present concrete ideas and examples of her work with philanthropists (including major donors and those who thought they had little to give) and tell some stories that you will not believe! Her presentation will also provide insight into what she sees as the future of philanthropy, including how technology can accelerate your development, including stewardship, efforts. Lisa is a much sought after speaker who utilizes humor and personal experiences to engage the audience members as they discover new methods and ideas for growing their results. This is a not to be missed session!

Lisa Dietlin
Lisa M. Dietlin is President and CEO of Lisa M. Dietlin and Associates, Inc. Ms. Dietlin serves her clients as a philanthropic agent, assisting entrepreneurial individuals and nonprofit organizations in developing transformational philanthropic strategies. Through expert advice and structured counsel, Lisa M. Dietlin and Associates, Inc. is quickly becoming the prime model for philanthropic leadership throughout the country.

Ms. Dietlin is a much sought after guest for many television and radio programs. In 2010 she began working on bringing philanthropic issues to the public via NBC 5 Chicago and is a regular contributor to The Huffington Post via her blog titled: Making a Difference: The World of Giving. In 2007 Lisa was named Charity Contributor to CBS 2 Chicago and appeared regularly to share information and ideas regarding how everyone can be involved in charitable work. She has also been featured on Oprah & Friends Radio as well as WGN Talk Radio and WCIU in Chicago, FOX News and National Public Radio. She is frequently quoted in many national publications including USA Today, Marketwatch, Reuters and The Chronicle of Philanthropy. Lisa and her team have been working on a television program showcasing acts of philanthropy and generosity. It is a positively focused daily show about those individuals, businesses, groups and organizations that are making a difference through the world of giving. Stay tuned for more details.


Active in the development/fundraising arena since 1982, Lisa holds and has held several seats on nonprofit
boards in where she contributes her extensive experience in strategic planning for development and fundraising. She is a frequent speaker on the subjects of entrepreneurial giving, major gifts fundraising and moves management, as well as board development.

Ms. Dietlin holds a Master’s Degree in Philanthropy and Development from Saint Mary’s University of Minnesota. She has served as an adjunct faculty member at North Park University, Chicago, Illinois, in its nonprofit management degree and certificate programs where she taught the “Capital Campaigns for Nonprofit Organizations” course she designed as well as the course entitled “Annual and Major Gifts Fundraising.”

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**Session 1: 11:05 a.m. - 12:05 p.m.**

**Session 1A – Stewarding the Donor: How Gift Officers and Stewardship Professionals Can Foster Lasting Donor Relationships**

**Description:** Stewardship requires nurturing sustainable donor relationships and wisely applying gifts of time, money and trust to organizational mission. Panelists from three prominent Chicago nonprofit organizations discuss how they integrate best practices into their respective fundraising programs, specifically exploring how development and donor relations officers can work together to define these practices, incorporate them into stewardship plans, and execute the plans for the best donor and organizational outcomes.

**Sector:** All Sectors  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop

**Speakers:**

**Marilyn Foster Kirk, CFRE**  
Marilyn Foster Kirk, CFRE, is associate chancellor for development at the University of Illinois at Chicago and associate vice president of the University of Illinois Foundation. She works with the Deans and Directors of Advancement in twelve degree-granting colleges to develop and execute effective strategies for private support. During the recently completed University-wide Brilliant Futures campaign, she led these colleges to exceed their combined goal by raising more than $339 million.

Previously Marilyn served in fundraising and university relations positions at Northwestern University, the University of Wisconsin-Parkside, Garrett-Evangelical Theological Seminary, Carroll College and the Kansas State Historical Society. In addition, she was vice president/dean of student affairs and a member of the psychology faculty at Westmar College.

She studied at Kansas Wesleyan University, the University of Oklahoma, the University of Kansas, and the Harvard University Graduate School of Education.
She is a past president and member of the board of directors of the Association of Fundraising Professionals, Chicago Chapter. She currently co-chairs the Fellows program, is a member of the Board Development Committee, and also serves on the Publishing Advisory Committee of AFP International. She is a former member of the CASE 5 board of directors. She is a frequent speaker at professional meetings and has served as a consultant and volunteer to many nonprofit organizations.

She is a recipient of the President’s Award from the Chicago AFP Chapter and the Chancellor’s Award for Professional Excellence from the University of Illinois at Chicago.

**Kristin Hughes, CFRE**

Kristin Hughes, CFRE, has been fundraising professionally for the past 17 years. Fourteen of those years have been focused on healthcare philanthropy, and the last 11 have been at Ann & Robert H. Lurie Children’s Hospital of Chicago, formerly Children’s Memorial Hospital. Currently she serves as Vice President of Major & Lead Annual Gifts Lurie Children’s overseeing a team of 12 Gift Officers. Lurie Children’s is in the final months of a $650 million comprehensive campaign that built a new children’s hospital in downtown Chicago and significantly enhanced its programs and initiatives. Prior to Lurie Children’s, she served as Associate Director for Alumni Relations at the Latin School of Chicago for 2 ½ years and Associate Director of Support Organizations for Northwestern Memorial Foundation. Prior to 1995, she was the protocol and Ambassador coordinator for World Cup USA 1994, and a regional retail sales analyst for the Guess? Clothing Company.

Kristin Hughes earned a Bachelor of Arts degree from Scripps College, Claremont, California, and a Masters degree from Loyola University of Chicago. She has been actively involved in the Midwest Regional Chapter of the Association of Fundraising Professionals for the past seven years. Hughes is currently the Vice Chair of the Association for Healthcare Philanthropy (AHP) 46th International Conference being held in Atlanta in October and will Chair the Conference in 2013 in Toronto. In 2009-2011 She served as AHP’s International Primer Chair, revising and teaching the curriculum for AHP Development Primer Workshop and has served as a Primer faculty member for the last six years. She has served on the board of the Junior League of Chicago and has been a member for over 20 years.

Hughes resides in Chicago with her husband, dog and cats. She is a avid mystery and thriller reader and film buff.

**Elizabeth L. Middleton**

Elizabeth Middleton is Associate Director for Stewardship at Children’s Hospital of Chicago Foundation (formerly Children’s Memorial Foundation). In her four years at Children’s, Elizabeth has worked to grow a streamlined, comprehensive stewardship program for donors of all levels, with a primary focus on major and principal gift-level individuals and families. As part of these efforts, she has implemented an endowed fund reporting process and developed the institution’s $1 million lifetime recognition society. Prior to Children’s, she was the Assistant Director of Development for the McCormick School of Engineering and Applied Science at Northwestern University. She is a proud member of the Association of Donor Relations Professionals and holds a BFA in Theatre Performance from Roosevelt University.
Jamie Phillippe, CFRE

Jamie Phillippe, CFRE, serves as Vice President of Development and Donor Services at the Chicago Community Trust, one of the nation's largest and oldest community foundations. Prior to the Trust, she served as Vice President, External Affairs and Strategic Initiatives at the Museum of Science and Industry for 13 years where she led strategic planning, fundraising, membership, government affairs, and institution-wide initiatives. She joined the museum from the Alford Group, a national consulting organization, where she served as Senior Vice President and National Marketing Director from 1992-1995. Prior to 1992, Phillippe was Vice President of Sumner Rahr & Company, a Chicago-headquartered fundraising consulting firm, and she was Vice President at Bellarmine University in Kentucky and directed development operations at the Louisville Ballet.

Jamie Phillippe earned a Bachelor of Arts degree from Butler University and a Masters degree from the University of Louisville. She has been actively involved in the Chicago Chapter of the Association of Fundraising Professionals, where she was the President and served on the board of directors. She has received the AFP Benjamin Franklin award for long-standing service and leadership to the non-profit community. Phillippe is currently a member of Butler University’s Board of Trustees. She has served on the boards of the Chicago Foundation for Women, Cancer Wellness Center, Arts and Business Council of Chicago, and Kittleman & Associates, an executive search firm. She serves on the board for North Park University’s Axelson Center for Non-Profit Management. She is lead instructor at the Donors Forum, has headed the Institute of Non-Profit Management at DePaul University, and was formerly the dean of the Managing Institutional Advancement Program at the University of Chicago.

Session 1B – From Diapers to Depends...Cultivating and Stewarding Young Philanthropists

**Description:** During this interactive session we will take a look at the Peter Pan Birthday Club, a walk designed by an 11 year old to benefit neuroblastoma, and a bunny drive that has brought over 22,000 bunnies to Cook Children's over the past 10 years.

Each of these programs began very small and we will walk you through the steps that we have taken to keep this audience engaged and we'll share practical ways that every non-profit can explore to grow this audience into major donors.

**Sector:** Healthcare
**Expertise Level:** Suitable for all levels
**Shop Size:** Suitable for any size shop
**Subject Focus:** Engagement

**Speaker:** Jennifer Johnson, CFRE

Jennifer is the Assistant Vice President of Development, Cook Children’s Health Foundation and oversees donor relations and community programs for the foundation and manages a leadership major gift portfolio. While at Cook Children’s she has been involved in all aspects of development, including major gift cultivation and solicitation, gift planning and stewardship reporting.
Session 1C – Beyond Cat Herding: The Power of a Donor Relations & Stewardship Working Group in a Large Institution

Description: Are you looking for a way to build greater buy in for new stewardship initiatives and to instill best practices across your institution? Do you want to keep donor relations and stewardship on your leadership team’s radar? Building an effective working group can help you go a long way in a relatively short amount of time. Join us to learn about the objectives, structure, process and results of the Donor Relations & Stewardship Working Group at UC San Diego!

Sector: Higher Education  
Expertise Level: Suitable for all levels  
Shop Size: Large Shop (11+ staff)  
Subject Focus: Internal Partnerships

Speakers:

Lynsey Buerer
Lynsey Buerer is the director of development for Donor Relations and Stewardship at UC San Diego. In this role, she leads the effort to implement centralized donor relations programming and raise the bar for donor relations efforts campus-wide. Lynsey began her career in development ten years ago at SDSU, where she worked in Annual Programs, Campaign Operations, and Donor Relations. She also served as the Secretary to SDSU’s Campanile Foundation. Lynsey earned her BA in Social Welfare at UC Berkeley and completed graduate work in Sociology and Peace and Conflict Studies at the University of Sydney in Australia.

Corinne Cramer
Corinne Cramer has been with Advancement Services at UC San Diego for over 4 years. She is currently the manager of Donor and Fund Stewardship. UC San Diego’s Stewardship office oversees endowment funds reporting, namings, endowed chairs and the publication of the annual Honor of Donors. Corinne has previously worked at the University of Montana / Missoula, Duke University and many private companies in the Human Resources area. UC San Diego Donor and Fund Stewardship recently won a “gold” CASE award (Council on Advancement and Support of Education) for their 2011 endowed fund reporting to donors.

Session 1D – Stewardship Today: Managing and Exceeding Expectations

Description: It's 2012 and stewardship has come a long way! It's not just about receipts, recognition and reporting. It's about managing and exceeding a myriad of expectations, expectations of yourself, your job, your team, your institution and of course, your donors. Our donors expect (and deserve!) personalized stewardship of their gift. It's not so easy given our workloads, because of course, everything is stewardship! The volume of our work seems to grow exponentially, so how will we get it all done? Join Susan and Carole as they share their proactive approach to stewardship and offer practical solutions to managing and exceeding expectations. As a group, we'll share ideas about how to delight our donors in 2012 and beyond.

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Sector: Higher Education  
**Expertise Level:** Midlevel (2-5 years), Experienced (5+ years)  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Professional Development  

**Speakers:**

**Susan Rankin**  
Susan Rankin is the Director of Stewardship & Donor Relations at McMaster University in Hamilton, Ontario, Canada. She leads the development of a comprehensive stewardship and donor relations program for McMaster. Previously, Susan was the Director, Alumni Affairs at the University of Guelph. Susan has presented at numerous CCAE (Canadian Council for the Advancement of Education) and CASE conferences on topics including Pro-Active Stewardship; Stewardship: It’s everyone’s Job; Engaging alumni at a distance; Managing your advancement career; and Effective event and volunteer management. In 2009, she co-chaired the CCAE National Conference. She is a past board member of CCAE and former President of CCAE-Ontario. She currently chairs the National Awards Program, Prix D’Excellence.

**Carole Stinson**  
Carole’s career at Western University covers 20 years in Development, Alumni Relations and Communications. Today, she is Executive Director, Development Programs with responsibility for Donor Relations & Stewardship, Annual Giving, Planned Giving, Ceremonies & Events and other activities. Whether during her time as a proposal writer or Campaign Director, Carole knows that building lifelong relationships for donors with the University and its faculty, students and staff is paramount. Her goal is to delight donors with an unparalleled philanthropic experience when they give to Western. She says it’s the best job in the world.

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**Session 2: 1:20 p.m. – 2:20 p.m.**

**Session 2A – Creative Stewardship: Nuts and Bolts of Developing and Implementing a Stewardship Plan**

**Description:** Learn the practical realities of deciding to adopt a formal stewardship plan; considering the use of a consultant for this process; drafting the plan, approval, documentation and systems integration; and staged implementation. The session will focus on Georgia Perimeter’s recent experience and will be lead by Executive Director of Institutional Advancement and GPC Foundation with support from Anne Manner-McLarty of the consulting firm Heurista. Participants will share their own experiences and learn the details of design and execution of the GPC donor stewardship plan, including specific documents, staff assignments and computer-aided record-keeping practices.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Policies and Procedures

[www.adrp.net](http://www.adrp.net)
Speakers:

Vicki Carew
Vicki Carew is the Executive Director of Institutional Advancement and the Georgia Perimeter College Foundation, where she is responsible for overseeing the college’s fund raising efforts. She is responsible for managing the Foundation’s assets and is leading efforts to launch the college’s first comprehensive campaign. While at GPC, Vicki has established sound donor and stewardship practices to successfully manage a multi-million dollar asset portfolio, and the cultivation and stewardship that’s central to developing and maintaining key donor relationships. Vicki’s has over twenty years’ experience in non-profit and higher education administration, and lends her expertise serving on several non-profit boards.

Anne Manner-McLarty
Anne Manner-McLarty is the president and lead consultant for Heurista, a multi-disciplinary firm dedicated to discovering the authentic stories that drive an organization’s mission. This work draws upon Anne’s experience and reputation as a thought leader in donor recognition and stewardship program planning. Before establishing her own company, Anne was president of Robin E. Williams Incorporated, and she has been an active participant in ADRP since 2005. She lives in Asheville, North Carolina where she has plenty of opportunities to re-engage her creative spirit and participate in community activities, including the annual TEDxAsheville productions.

Session 2B – The Art of the Narrative: Compelling Reports Show Donors a Fuller Story

Description: Narrative reports are another tool frontline fundraisers can use to build lifelong relationships with donors. Every year, the Donor Relations team at Dana-Farber Cancer Institute generates more than 550 narrative reports to inform major donors of the impact their giving has on our shared goal of conquering cancer. This presentation will illustrate how narrative reports are different from other forms of communication, detail how narrative reports add value to stewardship, and provide a model narrative reporting program. The model can be used to help get a program off the ground, or take an existing program to the next level.

Sector: Healthcare
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Reporting

Speaker: Erin Caitlin McVeigh
Erin McVeigh is Assistant Director of Donor Relations in the Division of Development and The Jimmy Fund at Dana-Farber Cancer Institute. In this role, she manages the narrative stewardship reporting program and an exceptional team of five talented writers. Erin graduated from Boston University with a B.S. in Public Relations and Mass Communications, and is a qualified accountant. Erin has more than ten years experience in non-profit project management, grant writing and administration, private consulting, copywriting, and editing. She has presented at European Commission information days on the European Union research framework, served on the
board of the American Women’s Club of Dublin, and is a member of Women in Development of Greater Boston, as well as the ADRP.

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**Session 2C – From Conception to CASE Award: Rebranding Your Leading Giving Society into an Impressively Added Service**

**Description:** Is your leading giving society in need of a face-lift? Take your first step toward rebranding with this informational session on overhauling your giving society from concept to CASE Award. Learn the necessary steps to strategically reframe your giving society to make it visually and programmatically appealing for your development officers and donors alike, and hear about how internal and community partnerships are useful resources when building added-value societies. This session will teach you how your recognition society can be a revered marketing tool for future giving, and show you the steps to make it happen efficiently and thoughtfully.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Medium Shop (6-10 staff), Large Shop (11+ staff)  
**Subject Focus:** Donor Recognition

**Speakers:**

**Cindy Belknap**
Cindy is the Director of Donor Relations at the University of Florida Foundation in Gainesville. A graduate of Eckerd College in St. Petersburg, FL, she began her career in donor relations at Eckerd in 1994 and went on to further her experience at Dartmouth College in 2002. With three years of the Ivy League under her belt and too much snow to mention Cindy welcomed the opportunity to return to Florida and work for Florida’s flagship university where she has been since July of 2005. Cindy is an avid reader, loves to knit, make jewelry, and enjoys kayaking. She is also a beekeeper and currently president of the Gainesville Area Bee Club and on the Board of Managers of the Florida State Beekeeping Association. She has two children, Rachel who lives in Michigan and Ryan who lives in South Korea.

**Kristin Bird**
Kristin is the Assistant Director of Donor Relations at the University of Florida Foundation in Gainesville. A graduate of the University of Florida, she began her career at Pepsi Beverages Company in 2005 in their college recruitment program. In 2007, she then transitioned back to the University of Florida as the fundraiser for the Florida 4-H Foundation, a direct support organization at UF that supports more than 250,000 young people participating in 4-H Youth Development across Florida. She joined the UFF’s Donor Relations team in 2010 because “donor relations is the best part of fundraising!”
Session 2D – Power of Partnerships: Engaging Administrators

Description: Ask not what your administrators can do for you, but what you can do for your administrators! When it comes to administrators and other non-advancement staff members engaged at a program level, there is an often un-tapped potential for powerful collaboration, increased efficiency and, ultimately, better stewardship and increased donor satisfaction.

Looking for a more collaborative relationship with your administrators? Wish your work together was more effective and efficient? Join donor relations professional Samantha Levine as she shares techniques for building and leveraging relationships with staff and the successful outcomes that she and her team have experienced.

Sector: Higher Education / Healthcare
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Internal Partnerships

Speaker: Samantha Levine
Samantha Levine is an Assistant Director for Donor Relations at UW Medicine in Seattle, WA with five years of advancement and non-profit experience. She and her colleagues are excited about current efforts at UW and UW Medicine to continue to build a robust and innovative stewardship and donor relations program.

Session 3: 2:40 p.m. – 3:40 p.m.

Session 3A – Donors are Prospects Too

Description: As Donor Relations professionals, our focus is understandably on donors. With good stewardship, repeat gifts will follow, and this is how we contribute substantively to building investments in our institutions. This highlights an important aspect of stewardship that we don’t always consider - donors are prospects too. So, how do we integrate our stewardship and cultivation efforts in strategic ways in order to better engage our donors at all levels?

Sector: Higher Education
Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Stewardship

Speaker: Ashleigh Manktelow
Ashleigh Manktelow began her career in Donor Relations and Stewardship at McGill University in 2005. Since that time she has had the opportunity to both participate in and manage many diverse projects including high profile gift announcements, the development of customized recognition pieces and the launch of an annual acknowledgements workshop. In her current role as Donor Relations Officer Ashleigh oversees all recognition and acknowledgement programs with a focus on top donor stewardship and continues to seek new ways to

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demonstrate meaningful impact to McGill’s donors. Ashleigh is a McGill University graduate and is currently pursuing a Master’s of Educational Psychology.

Session 3B – Strategic Stewardship: Cross-Channel Stewardship that Scales

Description:
Key Learning Objectives:
1. What meaningful stewardship is and how to scale it - key performance indicators to watch for in the donor life cycle
2. Integrated cross-channel stewardship - what is it and why using multiple medium matters
3. Active engagement verses passive involvement is a difference maker to the bottom line

Sector: Consulting
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Functional Development and Trends

Speaker: Allison Lewis Lodhi
A listener and a strategist, Allison Lewis Lodhi, CFRE, excels at identifying organizational opportunities, implementing strategic initiatives and maximizing resources. These talents inform her approach to consulting in her role as a vice president for Pursuant where she evaluates and develops integrated, cross-channel fundraising strategies that are holistic, scalable and focused on results. Allison loves to build; create positive change; and help people and organizations realize their full potential. Her expertise includes annual and mid-level fundraising, stewardship strategy, and effective nonprofit leadership and management. In addition to being a CFRE, Allison holds a Master of Arts degree in philanthropic studies from The Center on Philanthropy at Indiana University and a Bachelor of Science degree in journalism from the E.W. Scripps School of Journalism at Ohio University. A frequent speaker on emerging fundraising trends, Allison has presented at ADRP, AFP International, CASE, and the Women and Philanthropy Symposium, among others.

Session 3C – Endowment Fund: Reporting Big and Small, First-Timer and Pro!

Description: The thought of endowed fund reporting can be daunting whether you are a first-timer or a seasoned donor relations-stewardship professional. Looking at the moving parts and pieces of endowed funds and choosing those data elements that your institution can accurately report on is the best way to engage in this process. This session will cover the first steps of gathering endowment information to the celebration you will have when your endowment report package wowing your donors. Even if you are an endowment report expert, you may learn some new tips and tricks to add to your endowed fund reports.

Sector: Higher Education
Expertise Level: Suitable for all levels
**Speaker: Corinne A. Cramer**
Corinne Cramer has been with Advancement Services at UC San Diego for over 4 years. She is currently the Manager of Donor and Fund Stewardship. UC San Diego’s Stewardship office oversees endowment fund reporting, namings, endowed chairs and the publication of the annual Honor of Donors, as well as other institution fund reporting. Corinne has previously worked at the University of Montana, Missoula, Duke University and many private companies in the Human Resources area. UC San Diego Donor and Fund Stewardship recently won a, Gold - CASE District VII award (Council on Advancement and Support of Education) for their 2011 endowed fund reporting to donors.

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**Session 3D – Leveraging the Web & Social Media for Donor Recognition**

**Description:** Join us as we explore how leading Institutions, Foundations and Agencies are using the Web and Social Media to improve donor recognition. During this presentation we will review a number of best practice examples of how the Web and Social Media can enhance the way we recognize Donors. We will also discuss key considerations for developing your online strategy including Planning, Implementation, Transition and Maintenance. We hope to see you there!

**Sector:** Corporation  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Donor Recognition/Technology/Trends

**Speaker: Brandon Phipps**
Brandon Phipps is CEO of AcademicWorks, Inc, a company specializing in Scholarship Management Solutions for Foundations and Institutions of Higher Education. Over the past 15 years Brandon has helped over 1200 Colleges, Universities and Non-Profit Agencies improve their operational efficiency and service level through the use of technology. Brandon has presented at numerous conferences on the use of Technology and Social Media. Brandon is a graduate of Texas A&M University and lives in Austin, TX with his two kids.

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**Session 4: 4:00 p.m. – 5:00 p.m.**

**Session 4A – Savvy Socializing: How to Advance Your Institution and Yourself**

**Description:** As Donor Relations professionals we are often challenged with the practical side of socializing. Not only are we meeting total strangers for personal conversations about their alma maters or institutions, but we are also required to mix and mingle at large social events and professional conferences (sometimes while planning and executing them!) with the ease of seasoned veterans. This program is targeted at specific areas that are often stumbling blocks for people: entering and leaving conversations, facile introductions, what to talk about, how
to effectively work a room, how to segue to new topics smoothly, how to initiate and build a valued relationship with constituents.

**Sector:** Higher Education  
**Expertise Level:** Newcomer (0-2 years), Midlevel (2-5 years)  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Professional Development

**Speaker: Merrilyn Lewis**  
Merrilyn Lewis is a born teacher, and after working in schools, she had a successful career training would-be celebrity chefs in media and presentation skills. Merrilyn's third career has been at Smith College, where she engages donors every day using Savvy Socializing. Merrilyn mentors students and colleagues as they develop presentation skills, and teaches Savvy Socializing to college, high school, and middle school students regularly.

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**Session 4B – No Fund Left Behind: Five Simple Steps to Systematize Current Use Reporting**

**Description:**
- Are you sending a $20,000 endowed fund donor more regular and personalized reports than a $200,000 current use donor?  
- Does it seem like you don’t have the bandwidth to systematically report on current use funds?

Georgetown donors receive personalized report packages on current use and endowed funds. Donors feel well stewarded, and staff can focus on other strategic initiatives throughout the year. It does not take an army, just a streamlined system. You can do it, too. Julie will reveal how in five simple steps. No fund will be left behind. Your sanity will be spared, too.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Current Use Reporting

**Speaker: Julie Bostian**  
Julie Bostian is Associate Director of Stewardship at Georgetown University. She has 9 years of experience in strategic development communications, grant writing and corporate relations. At Georgetown, she oversees stewardship for the medical center and for scholarships. During her tenure, Georgetown stewardship has increased the response rate of scholarship students to “thank you” requests from 60% to 95%, through a strategic partnership with its financial aid office. Julie is CFRE-certified and received a 2010 Colleague Recognition Award for her work engaging financial and administrative leadership in stewardship compliance.
Session 4C – Recognizing Lifetime Giving Without Providing a Lifetime of Benefits

Description: Donor recognition programs when done well can provide a framework for celebrating extraordinary giving to your organization. Learn to avoid the pitfalls of providing a lifetime of benefits! The discussion will include best practices for setting up a new program and ideas for restructuring your current program.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Donor Recognition

Speaker: Angela Oonk
Angela Oonk is the Associate Director of Stewardship Recognition and Acknowledgements at the University of Michigan. She manages the university-wide recognition programs (Presidential Societies) as well as the high-end donor acknowledgements process. This past year, she has also been involved in the design of the stewardship module in a new donor database, as well as working on processes and reports to use this tool to its highest potential. Prior to joining the University of Michigan, she was Associate Director of Reunion Giving at Vassar College. She has a degree in Environmental Policy and Behavior from the University of Michigan.

Session 4D – Demonstrating Donor Impact in 60 Seconds or Less

Description: Take 4 staff members and add 550 six-figure donors, who have made hundreds of significant gifts that support scores of programs. However you do the math, the numbers do not add up to individual, custom reports for each donor. Using available resources, how can we create impact reports that are meaningful and feel personal, and might inspire the next gift? In answer to this challenge, we piloted a program that earned positive reviews from donors and colleagues, including skeptics. Both our model and our R&D process can be adapted to any institution and scaled to any size shop.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship Reporting

Speakers:

Cheryl Lintner
Cheryl Lintner joined the Rutgers University Foundation in May 2010 after moving from Los Angeles, where she worked for a small non-profit teen-to-teen help hotline. Prior to her work in the non-profit sector, Cheryl worked in the legal field, and prior to that, in academia. Her position with Rutgers is a perfect blend of her past experience; her primary responsibilities involve review of fund agreements, stewardship reporting, and scholarship events.
Nichole Mastrianni
As the Assistant Director of Stewardship at the Rutgers University Foundation, Nichole Mastrianni oversees the acknowledging and recognition areas of Donor Relations. In addition to the campaign donor wall, Nichole and her team recently launched two cumulative recognition societies, along with other events and activities designed to steward donors to the university’s current $1 billion dollar Our Rutgers, Our Future campaign. Nichole has also presented on the “Lifecycle of a Gift” which helps to illustrate the journey gifts take from inception to receipting and acknowledging. She has a degree in English and Journalism from Montclair State University.

Thursday, September 20, 2012

Keynote Speaker: 9:30 a.m. - 10:45 a.m.

A Place at the Table for Donor Relations

Description: The role of Donor Relations after a gift has led many organizations to treat their Donor Relations program as an afterthought. When organizations put Donor Relations strategies into place before solicitations even begin, the benefits for donors and the organization are greatly increased. This session will explore techniques to guide our organizations toward a new paradigm, where Donor Relations professionals are engaged as key strategists, resources for Donor Relations are a top priority, and the visibility of Donor Relations is increased at every level of the institution.

Penelepe C. Hunt

Penny Hunt is a professional fundraiser, trainer, management consultant and executive coach, with twenty-seven years of experience in the development field.

Penny is the Vice Chancellor for Development at the University of Illinois at Chicago. She heads a comprehensive program that includes seventeen schools and units, a central development office, and a comprehensive medical center. Penny works closely with UIC’s chancellor, deans and senior campus leaders build UIC’s philanthropy programs. She leads the campus’ $650 million campaign, manages a staff of 95, and has instituted an ongoing three-tier faculty training program. She is also appointed as Senior Vice President at the University of Illinois Foundation.

Prior to joining UIC, Penny spent thirteen years at Northwestern University, where she directed the university’s $1.5 billion comprehensive campaign. As associate vice president for development, she led Campaign Northwestern to a final total of $1.55 billion, making it one of the most successful campaigns in higher education. While directing the campaign, she also managed the major gift operations of seven schools and the university art museum. In previous assignments at Northwestern, Penny directed the Campaign for Scholarships and managed the university annual giving program.

In her private practice, Penny specializes in training, executive coaching and professional development for boards, presidents, deans and other senior leaders, and development staff. Throughout her career, she has trained over 2,000 academics and development professionals. Her book, Development for Academic Leaders: A Practical Guide to Fundraising Success, will be published by Jossey-Bass in the fall of 2012.
She has also served as director of development for the Des Moines Art Center, acting director of development for the Illinois Arts Alliance, and director of annual giving for Pomona College.

Penny earned a BA in English from Pomona College, and an MBA with distinction from the Kellogg School of Management at Northwestern.

Session 5: 11:05 a.m. - 12:05 p.m.

Session 5A – Misteaks, Mishaps, and Moving On

Description: Despite our best efforts, stuff happens. Sometimes we’re at the heart of the glitch, sometimes not. At times it’s our fault, other times not. Regardless, when an error comes to light, how do you bypass panic and move straight into fix-it mode? How do you avoid defensiveness and move into constructiveness? And how do you move on once the dust has settled?

This session will teach participants how to assess the damage, fix the damage, and then repair the relationship. Presenters will provide a damage-control checklist that includes elements of an effective apology. By hearing and providing examples of real-world scenarios, you’ll leave this session better equipped to respond to making lemonade out of the lemons you’ve been handed.

Sector: Higher Education
Expertise Level: Newcomer (0-2 years)
Shop Size: Suitable for any size shop
Subject Focus: Functional and Professional Development

Speakers:

Pam Havens
Pam Havens has spent more than a decade in donor relations/stewardship at Hamilton College in Clinton, New York. She oversees fund reporting and auditing, creating one-of-a-kind pieces for top tier donors, preparation of gift and fund agreements, presidential and memorial/honorary acknowledgments and notifications, and donor recipient events. A founding board member for ADRP and 2008 recipient of the Founders Award, Pam earned her bachelor’s degree in English/American literature from Eisenhower College, followed by a master’s in liberal studies from the State University of New York College at Plattsburgh and an associate’s in business administration from Cayuga Community College. Her past professional life encompasses educational public relations, publications, marketing and broadcasting.

Debbie Meyers
Debbie Meyers is director of donor services at Carnegie Mellon University. Previously, she was director of stewardship and donor relations at the University of Florida Foundation for nine years, serving as a central resource to 45 development officers at 20 colleges and units. Her development career began in 1986 as publications director for the health center development office at UF. She also was development and alumni communications coordinator for UF’s College of Medicine.

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director at Bishop Moore High School, her alma mater. A founding board member for ADRP, she has a bachelor’s degree in English from Loyola University in New Orleans and a master’s degree in journalism from UF.

Session 5B – Online Donor Portals: Why Would You, Why Wouldn’t You (A “Birds of a Feather” Session)

Description: Do you provide online access for donors to view their giving history? Many donors expect such online services, yet providing access is not only expensive, it comes with a host of security concerns and technological challenges. It can also expose organizational issues. Yet, it’s something a growing number of donors desire and even expect. This session is a moderated, open discussion for those whose institutions have, or are considering, making the move to secured, online donor services (portals). It is for those who would like to meet and connect with colleagues who are considering these issues and seeking solutions to address donors online, self-service needs.

Sector: Suitable for all audiences
Expertise Level: Suitable for all levels
Shop Size: Large Shop (11+ staff)
Subject Focus: Technology/Trends

Speakers:

Mark Lanum
Mark Lanum is the Director of Stewardship and Donor Recognition at the University of Washington. Having been in Advancement for over 12 years, he helped start the UW’s Stewardship office, and has served in his current role as Director for the past 4 years. He is a self-described people person by nature and computer nerd by choice.

Nancy McKinney
Nancy Lubich McKinney is Director, Donor Stewardship at the University of California, Berkeley. Her team is responsible for facilitating the Chancellor’s stewardship of the campus’s most generous donors and providing a foundational level of stewardship for the campus’s entire donor population. This involves 20+ discrete acknowledgement, recognition and reporting programs that collectively generate more than 50,000 donor “touches” each year.

Nancy began this second career in 2004. She spent the first 20 years of her professional life in the financial services industry, leaving Bank of America as a Senior Vice President in 2001. Nancy holds undergraduate degrees in mathematics and business administration from Berkeley, and an M.B.A. from UCLA. She also holds a certificate in marketing from the UC Berkeley Extension, and a certificate in nonprofit management from the University of Illinois at Chicago.
Session 5C – What Your Board Members Really Need to Know About Their Fiduciary, Fundraising and Advocacy Responsibilities and How to Communicate it to Them

Description: The most common challenge among NPOs is the role purpose of the board. If you would like to build a better board, one that knows it role, agrees with its role and fulfills that role, this session is for you. Learn how to effectively communicate the goals your organization has for its board and its role; create systems that eliminate tension with your Executive Director and other staff and create a true fundraising strategy your board members will embrace.

Sector: Religious Organization
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Board Development

Speaker: Alan Pearson
Alan has been a development professional for over 21 years. He is the Director of Donor Relations and Development for Living Waters. Since he began at Living Waters in January 2008, funds raised from private sources have increased more than one million dollars per year. Alan earned his CFRE in 2006 and been a member of AFP since 1993. He's been involved at the chapter level in many capacities including service on numerous committees and a frequent presenter at regional educational seminars on a variety of fundraising topics. He is also an active member of the ADRP.

Session 5D – A Minute to Win It, In the Shark Tank, Facing the Firing Line, The Sequel

Description: Considered a highlight of the 2011 ADRP International, Minute to Win It, The Sequel, is back with even more terrific ideas in 2012.

What happens when you mash-up these well-known TV shows? More great ideas than you ever thought could fit into a single conference session! In this rapid fire hour, dozens of Iron Donor Relations Professionals will face-off in the Advancement Stadium, each will pitch their best stewardship and donor relations ideas in roughly a minute, all the while taking questions from the audience. Everyone will reign supreme, guaranteed to have several good ideas to take away at the end of the session.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: The whole wide world of stewardship and donor relations/functional development

Speaker: Mary Solomons
Mary Solomons has been in the advancement field for 20 years, initially in the alumnae office of her alma mater, Wellesley College. For the past 14 years she has been at Skidmore College in Saratoga Springs, New York, first as Director of Alumni Affairs, and since 2000, overseeing the Office of Donor Relations. Elected to the ADRP
board in 2008, Mary chairs the PR Committee, has presented at numerous ADRP International Conferences, and has co-chaired the 2011 and 2012 NYC Regional Conferences. Mary is also active with the Council for the Advancement and Support of Education (CASE), serving on the faculty of the 2007 and 2009 Donor Relations Conferences and as a speaker at the Summer Institute for Advancement Services in July 2011 and the District I Annual Conference in February 2008.

Session 6: 1:20 p.m. – 2:20 p.m.

Session 6A – Making the Most of a Major Milestone: Leveraging Your Facility Opening to Steward and Cultivate Donors

Description: How can you take advantage of a major institutional milestone, like a facilities opening, to inspire donors, secure final campaign gifts and increase awareness of your institution’s value among all stakeholders? Rush University Medical Center’s Donor Relations team led a year-long planning initiative, involving hundreds of Rush employees and volunteers, that culminated in a series of 10 celebrations for 5,500 guests just prior to the opening of its new hospital. Join this interactive panel discussion to learn how your team can lead your entire institution in an initiative that enhances relationships with all stakeholders, including donors, volunteer leaders, employees, faculty and community partners.

Sector: Healthcare
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Events//Engagement

Speakers:

Lisa Aaronson
Bio not currently available

Sarah Finnegan
Sarah Finnegan serves as Associate Vice President in the Office ofPhilanthropy at Rush University Medical Center. She manages a team of professionals that oversee stewardship, donor communications, events, annual giving, and budgeting. As a member of the department’s leadership team, Sarah also contributes to strategic planning, human resource management, and goal setting initiatives. Prior to coming to Rush in 2005, Sarah worked for seven years in a nonprofit communications consulting role at Lipman Hearne, Inc. in Chicago. Earlier in her career, she served in for-profit marketing and economic development positions in California and Texas. Sarah holds an MBA from the Thunderbird School of Global Management.
Session 6B – Endowment Fund: Reporting Big and Small, First-Timer and Pro!

**Description:** The thought of endowed fund reporting can be daunting whether you are a first-timer or a seasoned donor relations-stewardship professional. Looking at the moving parts and pieces of endowed funds and choosing those data elements that your institution can accurately report on is the best way to engage in this process. This session will cover the first steps of gathering endowment information to the celebration you will have when your endowment report package wowing your donors. Even if you are an endowment report expert, you may learn some new tips and tricks to add to your endowed fund reports.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Endowment Reporting

**Speaker:** Corinne A. Cramer  
Corinne Cramer has been with Advancement Services at UC San Diego for over 4 years. She is currently the Manager of Donor and Fund Stewardship. UC San Diego’s Stewardship office oversees endowment fund reporting, namings, endowed chairs and the publication of the annual Honor of Donors, as well as other institution fund reporting. Corinne has previously worked at the University of Montana, Missoula, Duke University and many private companies in the Human Resources area. UC San Diego Donor and Fund Stewardship recently won a, Gold - CASE District VII award (Council on Advancement and Support of Education) for their 2011 endowed fund reporting to donors.

Session 6C – How the Role of Donor Relations Professionals Changes During a Campaign

**Description:** Donor Relations professionals have always worn many hats. But in an era where philanthropy, and “the campaign”, is becoming increasingly important in the strategic planning of our institutions, donor relations professionals are being asked to do more than ever. While this is an exciting opportunity to showcase the talents and abilities of our staffs, it can also be a slippery slope. Join the discussion on how roles and expectations change in a campaign and how we can help our staff manage both.

**Sector:** All sectors  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop

**Speaker:** Carrie Dahlquist  
As Director, Strategic Information Services for Campbell & Company, Carrie Dahlquist has a unique understanding of how complex information can impact the big picture and inform the decision making process. Prior to joining Campbell & Company, Carrie worked at the University of Chicago in a variety of leadership roles in advancement, including strategic planning, campaign management, annual giving and major gifts. Carrie holds an MBA from University of Chicago’s Booth School of Business with concentrations in econometrics, strategy and

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economics, and a BS in Human and Community Development from the University of Illinois at Urbana–
Champaign.

Session 6D – Stewarding Your Staff: Retention Strategies for Top Talent

Description: It appears that Puff Daddy was wrong, it’s not ‘all about the benjamins’, at least not when it comes to retaining our top talent. Just like our donor relations and stewardship strategies must be customized to our donors and prospects, we must also personalize our approach to retaining our top performers, understanding what’s important to them at different points in their career and not taking a one-size-fits-all approach. In this session, we’ll discuss the key factors that influence our approach to staff retention and look at a few case studies of short-term and long-term retention strategies.

Sector:
Expertise Level: Midlevel (2-5 years)
Shop Size: Suitable for any size shop
Subject Focus: Professional Development

Speakers:

Danielle Churilla
Danielle Churilla is the Associate Director for Staff Learning Programs in Human Resources and Staff Development in Alumni Relations and Development at the University of Chicago. She has spent the last four years building their internal staff training program, which includes developing a new curriculum for incoming staff, launching two management training series, and overseeing several roundtable series. She also manages their three internal conferences each year and works with outside consultants and trainers to deliver programming for the University’s frontline fundraisers and alumni relations staff. Before beginning her career in staff development, she spent 10 years in special events management at the university. She has a bachelor’s degree in elementary education from Purdue University.

Jeri Marcello
Jeri Marcello is Associate Director of Human Resources for the University of Chicago’s Medicine and Biological Sciences Development office. Jeri’s role is focused on retention and recruitment strategy and execution. She really enjoys providing service/support and building relationships with staff members. Prior to her time at the University, Jeri spent five years in the nonprofit management industry planning and executing continuing education and career development programs. Jeri also has worked in various administrative positions within health care and medicine. Jeri holds a bachelor’s degree from the University of Wisconsin and a master of business administration in leadership and change management from DePaul University.
Session 7: 2:40 p.m. – 3:40 p.m.

Session 7A – Engage, Empower, Excite: How to Connect Your Donors to Grateful Patients

Description: In this presentation, Maggie Brennan, Donor Relations Officer, will share how she created the Champions program. You will learn how to plan and implement a program for patients and families, providing them with opportunities to inspire, raise awareness and volunteer. This session will provide ways in which you can encourage and empower your donors to grow closer to your mission and vision, and essentially answering your call for support. This session shares actionable information you can put to use immediately.

Sector: Healthcare
Expertise Level: Suitable for all levels
Shop Size: Large Shop (11+ staff), Suitable for any size shop
Subject Focus: Donor Engagement/Grateful Patients

Speaker: Maggie Brennan
Maggie Brennan is a Donor Relations Officer at Cincinnati Children's Hospital Medical Center and has been managing the Champions program for the last 5 years. She has 12 years' experience in development and fundraising, including program management, stewardship, major gift solicitation and event planning.

Session 7B – The Performance Appraisal Discussion

Description: Partnering for Performance is a continuous process that involves managers and employees in the identification and evaluation of key job performance objectives and competencies that contribute to the achievement of organizational goals. It is designed to facilitate constructive discussion between the employee and manager in order to clarify performance objectives, provide feedback about performance with respect to skills and behaviors, and provide a framework for identifying the employee’s personal and professional development plans. In this session, you will learn about the Tartan way of evaluating performance, and see how you or your organization can use the framework for your benefit.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Professional Development

Speaker Bio: Krista Campbell
Krista Campbell is Assistant Director of Carnegie Mellon’s office of Foundation Relations. Her role is to promote and enhance relationships with foundation donors, and to plan, oversee, and implement all stewardship activities for the foundation relations unit, including grant administration, event planning, and fundraising. She has spent more than 20 years in non-profit management, and has broad experience in resource development, program and event development and management, marketing, and other administrative activities. She has a bachelor’s degree.
in liberal arts (MAGNA CUM LAUDE) from Wittenberg University and a master's degree in arts management (WITH DISTINCTION) from Carnegie Mellon University.

Session 7C – “So You Think You Want a Donor Wall…”

Description: You’ve considered a donor wall. You’ve weighed static versus electronic. But do you know how your donors prefer to be listed, what comparable institutions are doing and for what price, and whether you’re the smallest or largest client on your vendor’s list? Learn to anticipate and navigate the twists and turns of launching a recognition display, from gaining buy-in, to crafting a bullet-proof RFP, to choosing the right vendor and making your display an effective stewardship tool. Your institution - and your donors - will thank you.

Learn helpful hints and tips from two Donor Relations staffers who mounted a combination static and interactive display in less than six months and lived to tell the tale.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Donor Recognition

Speakers:

Nichole Mastrianni
As the Assistant Director of Stewardship at the Rutgers University Foundation, Nichole Mastrianni oversees the acknowledging and recognition areas of Donor Relations. In addition to the campaign donor wall, Nichole and her team recently launched two cumulative recognition societies, along with other efforts to steward donors to the university’s current $1 billion dollar Our Rutgers, Our Future campaign. Nichole has also presented on the "Lifecycle of a Gift" which helps to illustrate the journey gifts take from inception through receipting and acknowledging. Prior to coming to Rutgers, Nichole was a Development Director for the Summit Area YMCA in New Jersey. Nichole has a degree in English and Journalism from Montclair State University.

Katie Kutney
Arriving at the Rutgers University Foundation in early 2011, Katie Kutney dedicated the majority of her first year to managing the successful design and implementation of the Rutgers donor wall. Prior to joining Rutgers, Katie led development and stewardship efforts for the New York Council for the Humanities. She has eight years of experience in the non-profit sector, where she has developed expertise in individual cultivation and stewardship, event planning, grant-writing, and government advocacy. Katie holds a Bachelor of Arts degree from Princeton University.
Session 7D – Making Finance Work For You: Understanding the Finance Side of Stewardship

Description: Yale Funds Management has been working to build a cooperative process to allow monitoring of gifts from the first dollar received to the end of the gift's life for spendable gifts, or in perpetuity for endowment gifts. This experience has led to the development of key understandings and best practices we would like to share. Our perspective from "the other side of the fence" will provide insight into the financial side of gift management. We will present detailed ideas for how to make available technology work for fundraisers.

Sector: Higher Education
Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Fiduciary Stewardship

Speakers:

Matt Pretka
Matt Pretka is a business-analyst, software developer at Yale University. In close collaboration with the Office of Development, he has successfully led Yale’s Funds Management team through a complete renovation of the award set-up process. Known as the "user-friendly geek," clients praise Matt for his unique approach to helping apply technology to business problems. Matt is currently working to develop a scholarship selection and allocation process.

Chris Watkins
Chris Watkins is the Operations Manager for Yale University's Funds Management. Over the past four years, she has directed the process re-engineering of Yale’s gift administration business function by working closely with ITS, the Finance Team, the Office of Development and the Provost Office. She and Matt are known unofficially as "the dynamic duo."

Session 8: 4:00 p.m. – 5:00 p.m.

Session 8A – Making Events Matter: A S.M.A.R.T. Events Strategy

Description: Special events can be effective development tools or, without an comprehensive strategy, a waste of an organization’s time and resources.

Making events matter requires every event an organization executes to be Strategic, Measurable, Achievable, Results-oriented, and Thorough (S.M.A.R.T.). Through a demonstration of the S.M.A.R.T. strategy components, session attendees will learn how to minimize event waste by developing an event evaluation process, setting objectives, and making S.M.A.R.T. decisions. Attendees will also learn how to maximize event impact by selecting the right audience, creating a meaningful brand and message, strategically following up with attendees, and using metrics to understand the event’s value.
Speaker: Sarah Gould-Stotts
Sarah Gould-Stotts began her event planning career as a college first-year, working as an Assistant Event Planner for Southwestern University. Through assisting with plans for the annual honors convocation, December recognition ceremony, homecoming, and commencement, Sarah’s love for event planning was immediate. Upon graduation, Sarah relocated to Charlottesville, Virginia with her husband and began working as a Development Coordinator for the Charlottesville Senior Center. After a year in development, Sarah found the perfect culmination of her event planning and development experience as the Special Events Coordinator for the College and Graduate School of Arts & Sciences at the University of Virginia. Over the past year, Sarah has developed and implemented her S.M.A.R.T. events strategy in the Arts & Sciences Development office in addition to planning numerous cultivation events, board meetings, dedication ceremonies, and donor recognition events.

Session 8B – Trends in Donor Reporting: A Look at the Top 20 Institutions

Description: Whether you are new to stewardship or a more seasoned veteran of donor relations, it makes sense to take a look at your institution’s reporting practices. What do donors really want to know? How often do they expect updates? Are numbers critical or are narrative stories of impact the way to go? Can we do both successfully? In this session we will explore trends of the top 20 institutions and their reporting practices. Based on these examples, you’ll be able to look at your current reports with fresh eyes.

Speaker: Katherine Lane
Katherine Lane, the director of stewardship programs at the University of Notre Dame, has over 20 years experience in higher education and 15 in the field of donor relations. She was responsible for all the marketing collateral of the Spirit of Notre Dame campaign, which concluded in 2011 having achieved over $2 billion. She has a bachelor’s degree from Saint Mary’s College and earned her master of science in administration degree from the University of Notre Dame.
Session 8C – Getting to Next Practices: A Reflection and Suggestions Concerning Scholarship Stewardship

**Description:** A staple program of college and university stewardship and donor relations is scholarship stewardship, including requiring students to write letters to the scholarship donors. This is generally seen as a best practice in the field. Is there something beyond the one-size-fits-all approach now taken to recognize these donors? Can another approach with different tactics increase the philanthropic outcome of thanking scholarship donors and enlisting students in that effort? In this workshop we'll examine some of the questions that arise from the practices in scholarship stewardship and suggest some alternatives. A discussion of the application of Next Practice Theory to other endowment stewardship will ensue.

**Sector:** Consulting

**Expertise Level:** Suitable for all levels

**Shop Size:** Suitable for any size shop

**Subject Focus:** Scholarship Stewardship

**Speaker:** Julia Emlen

Julia Emlen is principal of Julia S. Emlen Associates. Since 1996, she has consulted with organizations across the nonprofit spectrum, including secondary and higher education, land conservation, health care, social services and the arts. Her work has included consultation on stewardship and donor relations, fundraising, organizational development, campaign management, strategic communications planning, executive and staff coaching, and board training. She is the author of Intentional Stewardship: Bringing Your Donors to Their Highest Level of Philanthropy (CASE Books, 2006) and Steering Through Stewardship, CASE Currents (December 2009). She is a frequent presenter for AFP and CASE, and has chaired the CASE Annual Meeting for Donor Relations and Stewardship. She holds the CASE Crystal Apple Award for Teaching Excellence. She is a member of the Association of Philanthropic Counsel and ADRP. She is an affiliate of Marts and Lundy, and an adjunct faculty member at Johnson & Wales University, teaching an undergraduate course on philanthropy and fundraising.

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Session 8D – Does Your Phone Weigh 500 Lbs? Strategies, Techniques and Time-Saving Tips for Phoning Your Donors

**Description:** The phone sits on our desk and stares at us! Picking up the phone to call donors can be a challenge ... and sometimes the phone feels like it weighs 500lbs!

As fundraisers we know the importance of calling donors to thank them ... but how, when, what do we say and most importantly who?

This interactive session will address stewardship strategies, the donor database and most importantly, help you raise more money for your organization.

You will leave this session and want to pick up the phone and start connecting with your donors!
**Sector:** Social Service Organization  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Functional Development/Phone Stewardship  

**Speaker: Samantha Laprade**  
Samantha has been in the fundraising sector for over 20 years. She has worked for organizations such as the Ottawa Humane Society, The Ottawa Hospital Foundation and currently The Ottawa Mission Foundation. Sam has a unique blend of skills including; media relations, public relations, fundraising, sales in the corporate world; all of this experience benefits her work with donors, the community and fellow professional fundraisers! Sam is a proud member of ADRP, AFP, and CAGP.

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**Friday, September 21, 2012**

**Session 9: 11:05 a.m. - 12:05 p.m.**

**Session 9A – Building a Culture of Stewardship: How a Fundraising Shop Went from No Frills to Thrills**

**Description:** Do you have ideas about how to transform your team’s commitment and use of effective donor stewardship? Do you have a plan, but can’t seem to find the time to push the boulder up hill? Follow a journey about building a culture of stewardship in a mid-sized shop. Learn about developing a vision, building buy-in, prioritizing your initiatives and tracking metrics. Walk away with concrete tools and ideas that can apply to any shop. Once your team is on board, watch the culture shift take place. Together you can take stewardship to new levels of greatness for your donors.

**Sector:** Healthcare  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Setting up Shop/Internal Relationships  

**Speaker: Sara Becker**  
Established fundraising professional with fifteen + years of experience. Works for Seattle Children's Hospital Foundation for past eight years and previously worked in conservation fundraising including Woodland Park Zoo, Seattle. A fundraising path starting in large scale events, transitioning to major gifts and ultimately finding a happy home in donor relations. Skilled in promoting philanthropy, developing programs, managing large scale projects and meeting goals.
Session 9B – Philanthropy 101: Teaching Students to be Engaged Now and Beyond

**Description:** Advancement professionals have long struggled with building a culture of philanthropy and giving back after day-one of a student’s experience in college. How can we teach them and encourage them to “get it”. Changing the culture of any institution is a significant challenge and we would like to share with you how Carnegie Mellon University is creating innovative partnerships and programs to build this culture from the ground up. Please join us to learn and brainstorm ways that you can improve student and young alumni giving and volunteerism culture in your institution.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Large Shop (11+ staff)  
**Subject Focus:** Technology/Trends

**Speakers:**

**Niccole Atwell**
Niccole Atwell is associate director of campus programs for the Office of Alumni Relations and Annual Giving at Carnegie Mellon University in Pittsburgh. In her six years at CMU, Niccole has guided a major transition of the student giving program and has overseen significant changes to recent graduate/young alumni giving and engagement programs as a component of CMU’s innovative overall annual giving strategy. Prior to her work at CMU, she spent five years at the Senator John Heinz History Center in Pittsburgh as a development associate, event planner and grant writer. Niccole received her bachelor’s degree in history from The College of Wooster and a master’s degree in public history from Duquesne University.

**Noelle Badertscher**
Noelle Badertscher is associate director of donor relations at Carnegie Mellon University in Pittsburgh after devoting a decade to the museum field with the Smithsonian Institution, National Gallery of Art and the federal Institute for Museum and Library Services (the primary museum and library granting arm of the executive branch). She has also served as the membership and development manager for the Frick Art and Historical Center in Pittsburgh. Noelle holds a master’s degree in art history and museum techniques from the George Washington University and a master’s degree in non-profit management from Carnegie Mellon’s H. John Heinz III College of Public Policy and Management.

Session 9C – Do It Write: Creating Substance and Style for Your Acknowledgement Letters

**Description:** Session presenters (Matt Engelhardt at Emory, Marie Gibbons at OSU, and Lori Green at UAB) have experience in writing acknowledgement letters and correspondence for healthcare institutions, small not-for-profit organizations, large not-for-profit organizations, and academic institutions. In addition to defining best practices and providing language tips to convey gratitude and identify impact, they will help define best practices.
and identify particular processes, thinking, and language for writing powerful letters that detail philanthropic impact, express gratitude, and effectively steward your philanthropic partners.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Acknowledgments

**Speakers:**

**Matt Engelhardt**  
Matt Engelhardt currently serves as Senior Director of Stewardship and Donor Relations at Emory University. Prior to his current position, Matt worked in the development office at Emory’s Robert W. Woodruff Health Sciences Center. Matt has also worked in residence life at Washington University in St. Louis, the University of Kentucky (2012 NCAA men’s basketball champs!), and on the headquarters staff of a national fraternity. He is also the proud owner of a very well-trained 3-year-old golden doodle.

**Marie Gibbons**  
Marie Gibbons has over 14 years’ experience in the field of Donor Relations. Her current role at Ohio State has her drafting gift agreements, endowment descriptions, and naming resolutions, along with training and supporting staff in the use of Blackbaud BBEC. She also oversees and supports the acknowledgment process across campus. Before that she drafted correspondence for the University President and Senior Vice President for Advancement. She previously worked at the American Heart Association and was part of a four member development team supporting five inner city and four suburban YMCAs. She has experience in a plethora of fundraising activities!

**Lori E. Green**  
Lori E. Green is Assistant Director at the University of Alabama at Birmingham. Previously, Lori was Director of Investor Relations at Otterbein University, Special Events Manager at Mount Carmel Health Systems Foundation (Columbus, OH), and PR Director for the Community Mental Health and Recovery Board and Licking Memorial Hospital. She also has written correspondence and fundraising materials for small not-for-profits including VOICEcorps, Granville Education Foundation, and WHO/Ohio. Lori received her BA from Denison University and MLS from Kent State University. She is separated from Kevin Bacon by only three degrees.

**Session 9D – Everything I Need to Know About Fundraising Success I Learned in Donor Relations**

**Description:** “Everybody knows” that excellent donor relations skills are at the core of smart fundraising tactics, but do your frontline fundraisers really understand that? Do they know how to incorporate planned stewardship into their cultivation and solicitation strategies, and understand that their fundraising success will be directly proportional to those efforts? If you’ve been frustrated at the difficulties of collaborating with your “road warriors” and getting them to understand the impact of donor relations on your donor base, or if you have your own portfolio of donors to cultivate, this session is designed to help you. Join donor relations-turned-frontline fundraising staff
Lisa C. Honan (Syracuse University) and J. Kay Coughlin (Capital University) for this discussion of specific donor relations tools that anyone can learn to use to increase donor satisfaction.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Professional Development

**Speakers:**

**Kay Coughlin**  
J. Kay Coughlin joined the Office of University Advancement at Capital University as a Major Gift Officer in November, 2011. Prior to that, she led the Office of Stewardship at Oberlin College, where she was responsible for overseeing all major fund and gift agreements, reporting to donors annually on 400 funds, gift acknowledgements, and divisional paper records. Kay's background in donor relations and non-profit management is reflected in her approach to development in a university setting, focusing on making the most of limited resources. Kay's experience ranges from front-line fundraising, grant writing and events management at small arts and social service organizations, to volunteer program coordination and producing performing arts. Kay has presented at many conferences, including the ADRP International Conference and the CASE Conference on Donor Relations. Kay holds a B.A. in Speech, Communications, and Theatre from Baldwin-Wallace College, and is a charter member of the Association of Donor Relations Professionals.

**Lisa Honan**  
Lisa C. Honan has been at Syracuse University for 20 years in both donor relations and fundraising capacities. She established the Donor Relations function at Syracuse in 1998, and rose to Executive Director of the department, overseeing five full-time staff responsible for all donor recognition and stewardship activities, both centralized and in collaboration with the University's schools and units. This includes donor agreement and gift management, stewardship reporting, acknowledgements, gift society recognition, and donor cultivation and recognition events and activity. In November 2008, she was appointed Assistant Dean for Development for the Maxwell School of Syracuse University, and in that role acts as the chief fundraising officer of the School, managing the fundraising operation, soliciting leadership gifts. Lisa has served the ADRP in several capacities, including co-chairing, with Pam Havens of Hamilton College, the International Conference in 2004. She is currently the Treasurer of the association. She has spoken about donor relations and stewardship at numerous conferences and workshops, both for ADRP and other organizations, and chaired the 2007 CASE Conference for Donor Relations.

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**Session 10: 1:20 p.m. – 2:20 p.m.**

**Session 10A – Engaging, Educating, and Inspiring Your Donors Through Special Events of All Sizes**

**Description:** This session will inspire you to create events that showcase your organization's excellence, "wow" your donors, and get your key stakeholders excited about being a part of what you do. Using a variety of examples from the University of Hawaii Foundation from a campaign kick-off event on the slopes of Diamond Head to helping a family scatter their mother's ashes in the waters off the Hawaii Institute of Marine Biology, you'll learn the key components of a successful event and how you and your organization are perfectly situated to offer memorable, inspiring, one-of-a-kind events to "wow" your donors as well.

[www.adrp.net](http://www.adrp.net)
Speaker: Martha Hanson
Veteran fundraiser Martha Hanson is Associate Vice President of Donor Relations at the University of Hawaii Foundation. In addition to working in an academic setting for more than seven years, she has worked for the Nature Conservancy of Hawaii; The Guthrie Theater, the Saint Paul Chamber Orchestra, and an HMO in Minnesota; a small chamber orchestra in New Mexico; and as a fundraising consultant. She is passionate about the work of non-profits and the important role of donor relations. She believes the greatest asset any one can bring to their work is a sense of humor.

Session 10B – Sensation Stewardship by Students at the University of Michigan Law School: The Student Thank-a-Thon Nacho Extravaganza

Description: The University of Michigan Law School's Student Thank-a-Thon Nacho Extravaganza is a four-day drop-in event where our students thank their benefactors by letter, note card, email, or telephone, with delicious Southwest-style food as the inducement. It's the occasion for our scholarship students to write their letters of thanks to those who have funded their scholarships, and it's also a chance for all students to thank all of our donors for their generosity. Everybody knows that alumni love student contact, and in the six years we've been doing this event, it's been more successful every year. Come see why!

Speaker: Alexandra Haddad
Alexandra M. Haddad is the University of Michigan Law School's director of stewardship and donor recognition. Her professional interests include developing tactics and tools to deliver highly personalized stewardship to large numbers of donors; expanding research, measurement, and evaluation in donor relations programming; and honing the art and science of translation between donors and beneficiaries. She is a dog lover, an avid fan of "The Big Lebowski," and a novice golfer, and resides in Chelsea, Michigan.

Speaker: Paul R. Schwankl
Paul R. Schwankl has been a stewardship associate at the University of Michigan Law School since 2009. His academic training is in philosophy, and he came to donor relations after many years in editing and publishing. He enjoys bringing his experience in building relationships through print to the task of nourishing the community of a
great law school. He passed the "Jeopardy!" live audition but didn't get picked to be on the show. Ann Arbor, Michigan, is his home.

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**Session 10C – Correspondence Clinic**

**Description:** Using your acknowledgement examples, together we will rewrite, re-craft, rethink, or redefine your message, process, and/or content. This workshop will be led by Matt Engelhardt, Marie Gibbons, and Lori Green, who have experience writing acknowledgements and correspondence for healthcare institutions, small not-for-profit organizations, large not-for-profit organizations, and academic institutions.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Writing, Correspondence

**Speakers:**

**Matt Engelhardt**  
Matt Engelhardt currently serves as Senior Director of Stewardship and Donor Relations at Emory University. Prior to his current position, Matt worked in the development office at Emory’s Robert W. Woodruff Health Sciences Center. Matt has also worked in residence life at Washington University in St. Louis, the University of Kentucky (2012 NCAA men’s basketball champs!), and on the headquarters staff of a national fraternity. He is also the proud owner of a very well-trained 3-year-old golden doodle.

**Marie Gibbons**  
Marie Gibbons has over 14 years’ experience in the field of Donor Relations. Her current role at Ohio State has her drafting gift agreements, endowment descriptions, and naming resolutions, along with training and supporting staff in the use of Blackbaud BBEC. She also oversees and supports the acknowledgment process across campus. Before that she drafted correspondence for the University President and Senior Vice President for Advancement. She previously worked at the American Heart Association and was part of a four member development team supporting five inner city and four suburban YMCAs. She has experience in a plethora of fundraising activities!

**Lori E. Green**  
Lori E. Green is Assistant Director at the University of Alabama at Birmingham. Previously, Lori was Director of Investor Relations at Otterbein University, Special Events Manager at Mount Carmel Health Systems Foundation (Columbus, OH), and PR Director for the Community Mental Health and Recovery Board and Licking Memorial Hospital. She also has written correspondence and fundraising materials for small not-for-profits including VOICEcorps, Granville Education Foundation, and WHO/Ohio. Lori received her BA from Denison University and MLS from Kent State University. She is separated from Kevin Bacon by only three degrees.
Session 10D – Building an Interactive Donor Recognition Wall a la Carte

**Description:** Realize your dream for an interactive donor wall without breaking the budget. Learn how this team built a budget friendly donor wall ala carte.

Learn how stepping outside the box may just be the answer you were looking for. After pursuing traditional methods for centralizing our donor recognition in an interactive format, we unveiled something unique. By working with a local tradeshow and graphics vendor and a company experienced in interactive exhibits and touchscreen kiosks, we were able to create a unique space that met all of our needs for a surprisingly modest price.

**Sector:** Higher Education  
**Expertise Level:** Suitable for all levels  
**Shop Size:** Suitable for any size shop  
**Subject Focus:** Donor Recognition

**Speakers:**

**Nancy Malaczewski**  
Nancy has worked at SNC since 1999 and became the Advancement office’s first Donor Relations Coordinator in 2004. As the only staff member with a title designated to donor relations, Nancy is responsible for donor recognition and stewardship activities including, but not limited to, scholarship reporting, acknowledgements, and special events. She is pleased to work with an advancement team that embraces donor-centric fundraising. Nancy is a charter member of the Association of Donor Relations Professionals.

**Bob Rickards**  
Bob joined SNC in 1998 as a computer coordinator, and now serves as the Director of Advancement Services. He is responsible for the acquisition, management, analysis and use of information necessary to support the day-to-day and long-term objectives of College Advancement, including prospect research, donor relations, and gift and data processing, Bob has previously presented at the CASE District V conference, where recent topics included Creating a New Culture of Efficiency, Accountability and Stewardship in Your Advancement Program, and From Chaos to Order - Implementing Effective Policies and Procedures.