10th ANNUAL ADRP INTERNATIONAL CONFERENCE
SEPTEMBER 30 - OCTOBER 2, 2013
PROVIDENCE, RI

Revolutionizing Donor Relations FOR THE NEXT DECADE

CONFERENCE PROGRAM

Monday, September 30, 2013

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

Following the Path to Donor Nirvana: The 5 Realizations Approach

Description: Join Tom Ahern as he guides you through his Five Sacred Realizations of Donor Communications. (Cue the soft music.) Realization #1. Your case for support is NOT about your organization's need for cash. It's about the savory, enticing opportunity you've put in front of the prospect. #2. Every donor communication sends a message. Unfortunately, it's often the wrong message.... etc.

Tom Ahern
Tom Ahern is considered one of the world's top authorities on donor communications. He is the author of four well-received books on the topic, with two more in the pipeline. Each year, he delivers dozens of workshops internationally. He spoke recently at conferences in New Zealand, the Netherlands, Belgium, Australia, and Italy as well as across North America. He specializes in applying the discoveries of psychology and neuroscience to the day-to-day business of inspiring and retaining donors.

His recent clients for cases, direct mail, newsletters and training include Animal Rescue League of Boston, Bread for the World, Carnegie Library of Pittsburgh, Catholic Relief Services, Houston Grand Opera, National Parks Conservation Association, PBS TV, Princeton University, Save the Children, Sharp HealthCare and other major hospital systems, The Cleveland Foundation, the United Way of Anchorage, University of Oregon, Volunteers of America ... as well as many smaller and local nonprofits.

He is an award-winning journalist. As a "message strategist," he's won three prestigious international IABC Gold Quill awards, all for communications campaigns which achieved phenomenal success. He collaborates with Prof. Adrian Sargeant and psychologist Jen Shang on prototyping innovative new donor communications campaigns for PBS.

He graduated from Brown University with a BA and MA in English. He completed his Certificate of Advertising Art from the Rhode Island School of Design.

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

Session 1A – Newsletters: Why Most Drive Donors Away -- and Why Some Succeed Beyond Anyone's Wildest Dreams

Description: Do donors really want a newsletter? "Absolutely," research shows. Yet most donor newsletters are thrown in the rubbish unread. Why? A handful of common yet fatal flaws.

Join award-winning journalist, Tom Ahern, for a fast, in-depth look at the secrets behind donor newsletters that truly improve income and retention.

You'll learn tested formulas for both paper and e-newsletters. You'll learn how to craft a powerful headline (and why that matters). You'll even learn how to invent news when you think you have nothing to say.

One hospital that took this workshop increased newsletter-triggered giving 1,000%, to US$50K per issue. Another revised child sponsorship newsletter now raises a half million dollars US annually from fewer than 10,000 donors.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Newsletters

Speaker: Tom Ahern
Tom Ahern is considered one of the world's top authorities on donor communications. He is the author of four well-received books on the topic, with two more in the pipeline. Each year, he delivers dozens of workshops internationally. He spoke recently at conferences in New Zealand, the Netherlands, Belgium, Australia, and Italy as well as across North America. He specializes in applying the discoveries of psychology and neuroscience to the day-to-day business of inspiring and retaining donors.

His recent clients for cases, direct mail, newsletters and training include Animal Rescue League of Boston, Bread for the World, Carnegie Library of Pittsburgh, Catholic Relief Services, Houston Grand Opera, National Parks Conservation Association, PBS TV, Princeton University, Save the Children, Sharp HealthCare and other major hospital systems, The Cleveland Foundation, the United Way of Anchorage, University of Oregon, Volunteers of America ... as well as many smaller and local nonprofits.

He is an award-winning journalist. As a "message strategist," he's won three prestigious international IABC Gold Quill awards, all for communications campaigns which achieved phenomenal success. He collaborates with Prof. Adrian Sargeant and psychologist Jen Shang on prototyping innovative new donor communications campaigns for PBS.

He graduated from Brown University with a BA and MA in English. He completed his Certificate of Advertising Art from the Rhode Island School of Design.

Session 1B – Best Practices for Donor Recognition and Naming Opportunities

Description: Is your donor recognition program all over the board – different signs and listings which create inconsistency? Are you looking for new ideas to highlight naming opportunities? Come hear from two different organizations about their best practices for managing and highlighting donor recognition and naming opportunities.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Naming Opportunities

Speakers:

Christine Scully
Christine Scully is the senior director of stewardship and donor relations. In this role, she is responsible for the oversight of a comprehensive stewardship program that promotes engagement with and recognition of donors at all levels. She manages high-level stewardship activities, which include events, endowment reporting, donor-focused communications, signage, and various personalized stewardship activities. During her 15 years in advancement, Christine has also served as a fundraiser for the American Red Cross and National MS Society.

Keri Muus
Keri Muuss is the director of donor relations at Children's Hospital Colorado and has worked in Donor Relations for over 13 years. Her experience spans higher ed, community foundations and healthcare. She currently oversees donor relations and has also been involved with other aspects of fundraising including communications, individual fundraising and planned giving. In her six years at Children's Colorado she has developed the Donor Relations program from the ground up, implemented a revised endowment reporting process, established two lifetime giving societies and refined and centralized the Foundation's stewardship processes and programs.

Session 1C – Talking + Teamwork = Smarter Fundraising

Description: An important role of donor relations professionals is to successfully work with fundraisers so they are in the best position to build lifelong relationships with donors. In this session, we will take turns examining some of our efforts to communicate, collaborate, and ultimately celebrate success with fundraisers. Examples and tips will provide insight into how we work with fundraisers to use donor relations services that recognize donor contributions and inform donors of the impact their giving has on the shared goal of conquering cancer.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Collaborations and Communications

Speakers:

Erin Caitlin McVeigh
Erin McVeigh is an assistant director of donor relations in the Division of Development and The Jimmy Fund at Dana-Farber Cancer Institute, where she has worked since 2011. 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 BS in Public Relations and Mass Communications, and is a qualified accountant. Erin has more than ten years experience in development, project management, grant writing and administration, private consulting, copywriting, and editing. She presented at the International Conference of the ADRP in 2012, and has also presented at European Commission information days on the European Union research framework. Erin is a member of the ADRP and the National Association of Science Writers.

Michela D'Eramo
Michela D'Eramo has worked in Dana-Farber Cancer Institute's Division of Development and the Jimmy Fund since 2006. She began her career in Principal & Major Gifts and moved to Donor Relations late 2007. Along with her team of three, Michela manages recognition and stewardship projects including space, signage, naming opportunities, and the annual Honor Roll of Donors. She was involved with the Institute's $1 billion capital campaign and oversaw the implementation of donor signage installed in the new clinical care building. Michela holds a bachelor's degree in human services from Assumption College where she serves on the Alumni Board Association.

Rebecca Dufault
Rebecca L. DuFault is the Director of Donor Relations at Dana-Farber Cancer Institute. She is responsible for designing, implementing and managing a comprehensive stewardship and donor recognition program that appropriately and consistently promotes engagement with and recognition of donors at all levels to the Institute and the Jimmy Fund.

She came to Dana-Farber from Beth Israel Deaconess Medical Center (BIDMC), where over a period of four years she was charged with reviving and rebuilding the Donor Relations program. Prior to her work at BIDMC Rebecca worked as an editor and marketing manager at Family Education Network, a division of Pearson Education. She spent the first ten years of her career teaching sixth and second grades in New Jersey and Virginia.

In 2011 Rebecca received a Dana-Farber Team Impact Award for her work on the Yawkey Core Team, a senior Institute workgroup established in 2009 to ensure cross-functional input towards operational planning and implementation issues related to the opening of the Yawkey Center for Cancer Care. Rebecca serves on the Women in Development (WID) Board of Directors and is co-chair of the WID Institute for Non Profits. She holds a B.S. from Old Dominion University and an M.S. from Long Island University.

Session 1D – Creating Our Own Stewardship Pipeline

Description: Come see how CHOP's small shop is finding fresh and inventive ways of growing their stewardship opportunities and becoming fiscally responsible all at once while still tackling the important day to day DR office tasks. During this interactive one hour session, Jerisha and Kate will share their secrets for defining a more robust program. They live for LOW COST, MINIMAL WORK, BIG RESULTS projects.

Come prepared to share with the group what you're doing and how. There will be a "Best in Show" competition. Share your inventive stewardship idea and hopefully you'll win a prize!

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speakers:

Kate Lucas
Kate Lucas is the donor relations coordinator at the Children's Hospital of Philadelphia Foundation and has worked in nonprofit for over 6 years. Kate collaborates with her small team on day-to-day stewardship duties and manages the Foundation's Circle of Care membership, acknowledgement letters and tributes while trying to find the time for creative new initiatives as well. Kate holds a B.A. in English from Misericordia University and an M.A. in Liberal Studies from The New School for Social Research.

Jerisha Gordon
Jerisha Gordon is the assistant director of donor relations at the Children's Hospital of Philadelphia. When not attending to the day-to-day stewardship duties associated with being a part of a "small shop", Jerisha manages and maintains Children's Hospital's donor recognition program which includes yearly honor rolls as well as the recently installed electronic, touch screen donor wall. Always eager to engage Hospital donors, Jerisha also spearheads the Foundation's consecutive giving society. With seven years experience in the field of donor relations, Jerisha is happy to share her hits and misses and to also learn from the successes of others. Jerisha holds a B.A. in English from the University of Delaware and an MFA in Creative Writing from Fairleigh Dickinson University.

Session 2: 1:20 p.m. – 2:20 p.m.

Session 2A – Stewardship Considerations for LGBTQ Donors

Description: This session will explore special considerations for stewarding lesbian, gay, bisexual, transgender, and queer (LGBTQ) donors. Conference attendees at all levels of knowledge about and experience with the LGBTQ community are welcome. You will learn key facts and figures about the LGBTQ donor pool and gain access to a variety of rich resources. Most importantly, we will focus on considerations, ideas, and action steps that you can take back to your organization, including tips for sensitive written and oral communication, establishing yourself as an ally to your donors, and creating targeted engagement and recognition initiatives.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Rebecca Taylor
Rebecca is the Assistant Director of Donor Relations at Davidson College and a newcomer to the field of Donor Relations. She holds degrees in Higher Education Administration from Texas A&M University and Spanish and Education from Davidson College, and previously worked in the fields of organizational development, student affairs, and alumni relations. She is a member of the LGBTQ community and has worked extensively with this population, serving as an advisor or board member with local and national LGBTQ organizations, alumni and student networks, and safe space and ally programs.

Session 2B – Donor Intelligence: Letting Donors Drive Your Messaging

Description: Key Learning:
1. How to develop and refine your messaging to target both online and offline trends exhibited by your donors.
2. Learn to how to optimize both new and existing resources to create relevant communication streams for your constituency.
3. Learn how to let a donor's online and offline behavior drive the type of messaging they should receive

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Large shop (11+ staff)

Speaker: Kevin Peters
As Vice President of Client Operations, Kevin serves in a leadership position over the web development and data analytics teams at Pursuant. His role involves providing services both at the operational and strategic level for many of Pursuant's clients.

As part of his role on the data analytics team, Kevin utilizes Pursuant's SmartData system to provide in-depth analysis on overall file health and specific campaign level performance. His work with this data system allows clients to see the lifecycles of their donors, and discover how to best optimize their fundraising program.

Session 2C – Donor Relations During a Campaign: If I Knew Then What I Know Now

Description: Campaigns are ambitious and sometimes grueling affairs, years-long endeavors filled with high pressure, big stakes, and the potential for tremendous payoff. Join us for a panel discussion with seasoned donor relations officers who have been through a campaign and lived to tell the tale. Our panelists will talk about their greatest campaign triumphs and their biggest blunders. Their insight will challenge your campaign stewardship assumptions and inspire you to think creatively and strategically about how to position your donor relations program for ultimate campaign success.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Campaigns

Speakers:

Charlotte Troyanowski
Charlotte Troyanowski, the panel moderator, joined Northeastern University as director of donor relations in 2012. Prior to working at Northeastern, she spent 11 years at Harvard University, beginning at Harvard Medical School and them moving to the University's central donor relations department. She is a graduate of Bryn Mawr College and Emerson College.

Joe Donnelly
With more than 25 years' experience in development, Joe Donnelly is currently the Associate Vice President, Advancement Services and Strategic Planning at Northeastern University. Though he has served in data management and research positions during his career, Joe's main expertise is donor relations; he has held positions in that area at Harvard, Brandeis, and Northeastern universities. He has also held front-line fundraising jobs in health care and education. He was the founding president of both the New England Development Research Association and the Association of Donor Relations Professionals (ADRP) and has presented on donor relations topics at ADRP, CASE, and AFP conferences. Joe holds a B.A. from Bates College.

Elizabeth Middleton
Elizabeth Middleton is Director of Donor Relations at Ann & Robert H. Lurie Children's Hospital of Chicago. "In this capacity, she oversees a team of four with responsibility for campaign wrap-up and post-campaign stewardship, as well as acknowledgment, recognition, and stewardship of Lurie Children's donors." In her five years at Lurie Children's (formerly Children's Memorial Hospital), 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 Lurie 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. She lives in Evanston, Illinois with her husband, her seven year old daughter and her two year old son.

Cindy Hancock
Cindy Hancock is Director of Donor Relations at Riley Children's Foundation in Indianapolis. Riley Children's Foundation is committed to improving the health and well-being of children through philanthropic leadership in support of Riley Hospital for Children at Indiana University Health and its research programs.

Prior to this position, Cindy spent 11 years building the Donor Relations program at Ann & Robert H. Lurie Children's Hospital of Chicago – while Lurie Children's was in the midst of planning for, launching, and successfully completing a $650 million comprehensive campaign. At Lurie Children's, Cindy managed all donor recognition efforts for a 23-story replacement hospital project in downtown Chicago; redeveloped the gift acknowledgment process; and initiated an endowment reporting process. She also participated in a major database conversion project and the development and implementation of formal gift agreements at Lurie Children's.

One of Cindy's proudest career moments has been the opportunity to lead stewardship of a $100 million campaign gift. She is gratified by her past service as a Board member of the Association of Donor Relations Professionals (ADRP) and her membership in this dynamic professional organization.

Jeff Muller
Jeff Muller is the director of donor communications & stewardship at World Wildlife Fund. His team produces strategic work which cultivates and stewards WWF's donors at every level of giving, reinforcing WWF's mission and vision of a world where people live in harmony with nature.

With nearly 20 years of fundraising, marketing and communications experience, Jeff has spent the last decade helping to advance environmental organizations of all sizes. In that time he leveraged all manner of communications - print, video, audio and digital - to build strong relationships and spur programmatic growth.

Session 2D – Effective Donor Relations: What Does That Mean?

Description: Are you new or fairly new to donor relations and still struggling with how to be as effective as the donor relations expert at your organization? This session will focus on helping you get organized, manage expectations and find new ways to build relationships with your donors.

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.

Expertise Level: Newcomer (0- 2 years), Midlevel (2-5 years)
Shop Size: Suitable for any size shop
Subject Focus: Donor Relations

Speaker: Toni Robinson
Toni Robinson is the director of donor relations at the University of Hartford where she leads a comprehensive stewardship program. Toni began her career at the University as the director of advancement services 16 years ago, then seven years ago was asked to create the donor relations program. Under her leadership, University donors are shown appreciation through special events, named signage, endowment reports and letters of

gratitude from scholarship recipients. Prior to working at the University, Toni was the executive director of the Connecticut Democratic State Party. A founding board member of the Association of Donor Relations Professionals (ADRP), Toni has served on several committees as well leading sessions on donor relations at the annual conference and regional conferences. In 2005, Toni received the ADRP Inaugural Service Award for her work in the donor relations field. Toni has a bachelor's degree in Women's Studies and a master's degree in Communication both from the University of Hartford.

Session 2E – Hot Topics for Seasoned Donor Relations Leaders & Managers

Description: Join seasoned professionals Mark Lanum, director, stewardship & donor recognition at University of Washington, and Patricia Berry, director of stewardship programs at the University of Michigan, in this small group conversation to explore topics of interest to advancement professionals leading teams in larger organizations. Participants will be surveyed by the facilitators two weeks before the conference to determine the 5 "hot topics" the group would like to explore in this conversation and should come prepared with any materials or examples they would like to discuss.

Expertise Level: Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Donor Relations

Speakers:

Patricia Berry
As a leader of strategic donor relations and stewardship programs Patricia Berry brings together a strong background in business systems and technology from her work as a consultant and business systems analyst in the private sector and pairs it with more than 12 years of experience in non-profit fundraising that includes front-line major gifts, leadership gifts, stewardship, donor relations, technical innovation and campaign strategy at some of the top educational institutions in the country including Columbia University, New York University and Fordham University.

Since 2010, Patricia has led the University-wide donor relations programs at the University of Michigan, overseeing a team of stewardship professionals closely aligned with leadership giving who in addition to providing centralized stewardship and strategic vision, also create tools, resources and learning experiences designed to empower donor relations professionals working within the decentralized structure to provide a unique, timely and engaging donor experience. Elected to the board of ADRP in January 2013, Patricia currently serves on the ADRP Education Committee.

Patricia received a Bachelor of Arts in Comparative Literature from Fordham University.

Mark Lanum

Mark is the Director of Stewardship and Donor Recognition at the University of Washington. During his more than 12 years in Advancement at Washington, Mark has had a variety of responsibilities ranging from administrative assistant to the AVP, to campaign and institutional reporting, to prospect management and fundraiser metrics. In his current role as Director of Stewardship and Donor Recognition, Mark is overseeing the development of new strategies and systems to support broad-based stewardship. This includes online data collection from internal partners in order to provide online impact reporting for donors. Working within a central/de-central environment he strives to bring colleagues together to collaborate, commiserate, and celebrate their work as donor relations professionals.

Session 3: 2:40 p.m. – 3:40 p.m.

Session 3A – How On-Boarding New Development Professionals Elevates the Role of Donor Relations/Stewardship

Description: Often, our stewardship officers have the deepest organizational relationships with our donors and friends. In this session, learn ways to capitalize these relationships as a way to not only on-board new staff but to assist new development hires in your organization to be successful (while demonstrating the role and value of your stewardship shop). The session will include new ways to bring value to your development efforts, easy steps to build an on-boarding plan, tips on strengthening relationships throughout Advancement, and ways to build collaboration and value add to your service model.

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

Speaker: **Kathy Drucquer Duff, CFRE**
Kathy Drucquer Duff, CFRE, has more than 19 years of wide-ranging development experience. As associate vice chancellor at UCSD, Kathy leads the University Development team and serves on the External Affairs management team. Previously, she worked both at Sharp HealthCare Foundation as vice president, philanthropy, and as associate vice president for SDSU. There she oversaw the institution's annual, major gift and gift planning efforts, as well as assisted in developing the institution's strategy for its first comprehensive campaign. Kathy also spent seven years in destination management. A frequent speaker for Academic Impressions, she's also an active volunteer for Girl Scouts..

Session 3B – Donor Engagement: How the Past Informs Our Future

Description:
Our presentation will explore the growth of professionalism of the field of donor relations from two perspectives: a seasoned development leader who has been a long-time advocate for developing strong donor relations programs as part of a strategic fundraising strategy and a seasoned donor relations professional who has spent

nearly 17 years creating and implementing comprehensive donor engagement programs.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Donor Relations

Speakers:

Rose Dalba
Rose Dalba currently is director of donor engagement and development operations at the Chicago Symphony Orchestra, where she manages a team of 12. Rose is a senior manager with 17 years of experience in donor relations and development communications. Rose's current responsibilities include creating and implementing a comprehensive donor engagement plan and recognition system to recognize and steward CSO donors and volunteers. Rose is the former vice president of donor stewardship and communication at Feeding America and executive director of donor relations at the University of Chicago. Rose has been a member of the ADRP since 2004, serving as the first Board vice-president and as Board president from 2006-2008.

Session 3C – The Live Online Giving Challenge

Description: You probably spend most of your time thinking about developing compelling campaigns on and offline, finding new ways to engage supporters, and maintaining relationship with donors. The design and content of your online giving site is probably the last on your list. Yet, studies have shown that a well-optimized donation page can help you convert visitors into donors. Join me as we examine the Live Online Giving Challenge! Bring your URL and a sense of humor as we attempt to make gifts together to see what the "donor experience" is really like!

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Online Giving

Speaker: Lynne Wester
Lynne Wester is the director of stewardship and donor recognition at Yeshiva University in New York City and is responsible for designing, implementing and coordinating a comprehensive stewardship and donor recognition system that appropriately and consistently promotes engagement with and recognition of donors at all levels.

In addition to her work responsibilities, Lynne is a frequent conference speaker and well known resource for donor relations and fundraising expertise. She has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy and other industry publications. Lynne also created the website and blog http://www.donorrelationsguru.com where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world an hosts a monthly webinar series. Using her expertise and hands on approach, she works with many organizations to help them keep their focus donor driven, technologically savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan. She is currently pursuing her master's degree in strategic fundraising and philanthropy.

Session 3D – How to Reorganize, Refresh and Renew Your Fund Development Efforts to Outcomes

Description: OMG and SMH! In an over stimulating social media world, small development and small donor relations shops are overwhelmed with a myriad of issues, including just day to day operations. This presentation will share two real life stories of successes AND failures – one from a social services institution and one from higher education. The Jewish Family & Community Services doubled donor revenue in two years using tools to get organized, refreshing efforts and renewing the energy of a mission almost 95 years old, while Loras College built a comprehensive donor relations program from the ground up.

Expertise Level: Newcomer (0- 2 years), Midlevel (2-5 years)
Shop Size: Small Shop (1-5 staff), Medium Shop (6-10 staff)

Speaker: Lia Kampman
Lia Kampman is the Campaign Director at Wartburg College in Waverly, Iowa, where she is responsible for planning, supervising, and managing a variety of activities and projects designed for successful completion of a comprehensive campaign. She is a member of ADRP and was formerly an at-large board member of the Tri-State Chapter of the Association of Fundraising Professionals. She was also a 2010 ADRP International Conference Sheryl A. Blair Scholarship recipient. Kampman completed her bachelor's degree at Wartburg College and her Master of Arts degree in Philanthropy and Nonprofit Development from the University of Northern Iowa.

Heather Corey, CFRE
Heather Corey, CFRE, is the Director of Development & Marketing at Jewish Family & Community Services, Jacksonville, FL. She has worked for the American Cancer Society and a local grassroots adult literacy nonprofit. In her spare time, she created JaxPHILville; an online social philanthropy resource website for nonprofits on the First Coast. Heather is a Past President of the First Coast AFP Chapter and is currently President of the AFP Florida Caucus. She attended the University of Maryland, European Division, while living in Italy when her husband was stationed in the US Army. She is a mom of 3 beautiful, busy girls.

Session 3E – Hot Topics for Seasoned Donor Relations Leaders & Managers

Description: Join seasoned professionals Mark Lanum, director, stewardship & donor recognition at University of Washington, and Patricia Berry, director of stewardship programs at the University of Michigan, in this small group conversation to explore topics of interest to advancement professionals leading teams in larger organizations. Participants will be surveyed by the facilitators two weeks before the conference to determine the 5 "hot topics" the group would like to explore in this conversation and should come prepared with any materials or examples they would like to discuss.

Expertise Level: Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Donor Relations

Speakers:

Patricia Berry
As a leader of strategic donor relations and stewardship programs Patricia Berry brings together a strong background in business systems and technology from her work as a consultant and business systems analyst in the private sector and pairs it with more than 12 years of experience in non-profit fundraising that includes front-line major gifts, leadership gifts, stewardship, donor relations, technical innovation and campaign strategy at some of the top educational institutions in the country including Columbia University, New York University and Fordham University.

Since 2010, Patricia has led the University-wide donor relations programs at the University of Michigan, overseeing a team of stewardship professionals closely aligned with leadership giving who in addition to providing centralized stewardship and strategic vision, also create tools, resources and learning experiences designed to empower donor relations professionals working within the decentralized structure to provide a unique, timely and engaging donor experience. Elected to the board of ADRP in January 2013, Patricia currently serves on the ADRP Education Committee.

Patricia received a Bachelor of Arts in Comparative Literature from Fordham University.

Mark Lanum
Mark is the Director of Stewardship and Donor Recognition at the University of Washington. During his more than 12 years in Advancement at Washington, Mark has had a variety of responsibilities ranging from administrative assistant to the AVP, to campaign and institutional reporting, to prospect management and fundraiser metrics. In his current role as Director of Stewardship and Donor Recognition, Mark is overseeing the development of new strategies and systems to support broad-based stewardship. This includes online data collection from internal partners in order to provide online impact reporting for donors. Working within a central/de-central environment he strives to bring colleagues together to collaborate, commiserate, and celebrate their work as donor relations professionals.

Session 4: 4:00 p.m. – 5:00 p.m.

Session 4A – Transformational Corporate Engagement; Insights From Cultivating a $ 27.1M Gift

Description: This session tell the story of leading the team effort to secure a $ 27.1M corporate gift. Participants will learn the process, and receive the tools and template to move beyond sponsorship level gifts to transformational investment with corporate partners. Participants will:

1. Be introduced to strategies and resources to powerfully align their mission with corporate investors towards transformational results.
2. Explore how they may help solve business problems through philanthropy.
3. Receive a template for creating shared value with corporate partners and increasing major gift results.

Expertise Level: Suitable for all levels
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Corporate Gifts

Speaker: Tammy Zonker
As a fundraising practitioner, Tammy Zonker has more than twelve years of experience fundraising, consulting and training nonprofit organizations. A native Midwesterner, Tammy led fundraising workshops throughout the U.S. for Seattle based Benevon as senior coach and workshop instructor for nearly six years. In 2008, she felt a calling to return to the front lines of fundraising in one of the most economically challenged communities in the country: Detroit, Michigan.

She recently completed a large-scale engagement leading United Way for Southeastern Michigan's corporate fundraising strategy; contracting for 2.5 years as senior director of corporate relations & strategic initiatives where she worked with a team to transform corporate engagement strategies from transactional to relational, obligatory giving to inspired giving and to create shared and sustainable value. She believes corporate philanthropy is a vital tool for corporations to further both their corporate social responsibility objectives and their larger missions.

In 2010, she led the team effort to secure a $27.1M gift from General Motors Foundation to the United Way for Southeastern Michigan's Educational Preparedness Initiative; the largest gift in the 34 year history of the foundation.

Session 4B – Dear Angie: A Management Advice Session

Description: Do you have a tough question or situation you need answered at work? Do you wish you had a sounding board with which to bounce ideas? This is your forum for seeking advice. Discover a few tools to help you as you begin to navigate your own management path.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Donor Relations

Speaker: Angela Joens
Angela is executive director of development outreach for the University of California Davis, supervising annual giving, donor relations, research, prospect management, proposal services, marketing and communications for the Office of Development. She is a frequent presenter and past board member of the Association of Donor Relations Professionals.

Session 4C – Spotlight on Top Donors: Personal and Meaningful Stewardship

Description: Is your high-end donor recognition program all it can be? While each and every benefactor is valued and deserving of appropriate recognition efforts, those who give at the most significant levels require meaningful stewardship. Providing fundamental yet personal communication through custom plans is a recipe for happy donors. Audience members will take with them ideas on how to tailor creative, engaging, and manageable donor appreciation vehicles used to help foster continued and augmented giving.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop

Speakers:

Jo McCourt
Serving as associate director of stewardship and donor relations at Boston University since 2010, Jo McCourt is responsible for gift/pledge agreements, fund establishment, and fund impact reporting, including student and faculty letters of appreciation. Prior to BU, Jo worked in a couple of roles in University Advancement at Boston College for eight years. She oversaw the recipient assignment process for donor-established scholarships, managed the student thank you letter program, produced fund impact reports, and ran donor relations and scholarship recipient events. A Double Eagle, Jo received her bachelor's and master's degrees from Boston College.

Lynne Wester
Lynne Wester is a frequent conference speaker and well known resource for donor relations and fundraising expertise. She has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy and other industry publications. Lynne also created the website and blog www.donorrelationsguru.com where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world and hosts a monthly webinar series. It is her personal philosophy that the goal of any great fundraising operation is to use strategic communications and interactions to foster the relationship between the organization and its constituents and friends. If we are effective with that strategy, they will be engaged in a way that drives them ever closer to embracing the organization's mission and values, they will give their money, time and talents and volunteer to spread that same message with others which will encourage their fellow peers to invest in a way that will enable the organization to further light the world.

Using her expertise and hands on approach, she works with many organizations to help them keep their focus donor driven, technologically savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan. She is currently pursuing her master's degree in strategic fundraising and philanthropy.

Valerie Richardson
Valerie Richardson is a five-year veteran in donor relations at the Yale University Art Gallery. Trained as an artist, she first worked at the Gallery in a curatorial department before transitioning to the Development team.

Mary Fisher
Mary Fisher is an assistant director of stewardship programs within the Department of Development at the University of Notre Dame. In this role, she is actively involved in ongoing donor acknowledgment and recognition efforts, and is presently tasked with enhancing process efficiencies for the production of annual University endowment reports. She has a bachelor's degree from Notre Dame, and is presently enrolled in the University's Master of Nonprofit Administration program.

Session 4D – Making Gift Documentation Feasible and Friendly

Description: In a perfect world, gift agreements should serve two functions: recognition and documentation. But in the real world, we express our gratitude to the donor then get into the housekeeping of when they're going to pay and what happens if, and we stray into the Legal Land of herewith and forthwith. In combining recognition -- "we gratefully acknowledge the generosity of DONOR" -- with documentation -- "if unforeseen circumstances in the future should make said fund impractical or illegal" -- we end up with surf-and-turf or sleeper sofas. You know – the worst of both, the best of neither. But it doesn't have to be that way! This session will focus on merging the ideal with the practical, the art with the science, the numbers with the warm and fuzzy.

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

Speaker: Debbie Meyers
Debbie Meyers recently became senior director of donor relations and stewardship at the University of Maryland. Previously she was director of donor services at Carnegie Mellon University for eight years, where she oversaw donor relations, stewardship and gift documentation, and 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 UF's health center development office. She also was development and alumni director at Bishop Moore High School (her alma mater), and development director at the Orlando Museum of Art. A founding board member of the Association of Donor Relations Professionals, she has a bachelor's degree in English from Loyola University in New Orleans and a master's degree in journalism from UF. She is grateful that she can repurpose her Pittsburgh/BMHS black and gold clothes in Maryland.

Tuesday, October 1, 2013

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

Driving Performance through Creativity, Innovation and Execution

Description: Drawing on her leadership experience and proven elements of personal and group motivation, Elizabeth Crabtree will engage the ADRP membership audience in a retrospective and interactive discussion of the relationship between creativity, innovation and motivation in performance management. By leveraging our natural human abilities to imagine and invent we can turn challenges into solutions and discover new and exciting ways to transform our thinking to achieve excellence in our work and our careers. This encouraging and enlightening conversation will focus on how to achieve personal satisfaction, foster innovative thinking and inspire team effectiveness to increase your impact and success.

Elizabeth Crabtree
Elizabeth Crabtree is the Assistant Vice President for Strategy and Resource Development at Brown University where she serves as a member of the Advancement Division's senior leadership team and an advisor to the Sr. Vice President for University Advancement. Elizabeth is responsible for strategic planning, resource development and operations management at Brown and has particular expertise in campaign planning and management, analysis and reporting, communications and all aspects of prospect development. Previously Elizabeth held senior development and nonprofit management positions with Northern Illinois University, Benedictine University, College of DuPage and the Digital Schoolhouse Foundation at Platinum Technologies/Computer Associates. She is a former president of APRA and a member AFP, CASE, and NEDRA. In 2012, Elizabeth was the recipient of APRA's prestigious Visionary Award and received NEDRA's Ann Castle Award in 2007 in recognition of her outstanding achievements and contributions to the fundraising research profession. Under Elizabeth's leadership, the Prospect Development team at Brown was honored to be named a 2010 CASE Circle of Excellence award winner. Prior to her work in the nonprofit sector, Elizabeth spent eight years working as a sales and marketing director and senior analyst in the consumer products and manufacturing industries and six years in arts management as a talent/music agent. Elizabeth is a graduate of Berklee College of Music and is an alumna of the Philanthropic Studies program at Indiana University.

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

Session 5A – The Leadership Challenge: Empowering and Inspiring Excellence

Description: Designed to help managers achieve their greatest potential by honing effective leadership and team management skills, this program will examine proven management practices, positive leadership models, and practical real-world advice for building and leading teams to excellence. Sample strategic planning, creative thinking, team building and goal-setting exercises will be demonstrated. Participants will be encouraged to interact and share best practices of their own.

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

Speaker: Elizabeth Crabtree
Elizabeth Crabtree is the Assistant Vice President for Strategy and Resource Development at Brown University where she serves as a member of the Advancement Division's senior leadership team and an advisor to the Sr. Vice President for University Advancement. Elizabeth is responsible for strategic planning, resource development and operations management at Brown and has particular expertise in campaign planning and management, analysis and reporting, communications and all aspects of prospect development. Previously Elizabeth held senior development and nonprofit management positions with Northern Illinois University, Benedictine University, College of DuPage and the Digital Schoolhouse Foundation at Platinum Technologies/Computer Associates. She is a former president of APRA and a member AFP, CASE, and NEDRA. In 2012, Elizabeth was the recipient of APRA's prestigious Visionary Award and received NEDRA's Ann Castle Award in 2007 in recognition of her outstanding achievements and contributions to the fundraising research profession. Under Elizabeth's leadership, the Prospect Development team at Brown was honored to be named a 2010 CASE Circle of Excellence award winner. Prior to her work in the nonprofit sector, Elizabeth spent eight years working as a sales and marketing director and senior analyst in the consumer products and manufacturing industries and six years in arts management as a talent/music agent. Elizabeth is a graduate of Berklee College of Music and is an alumna of the Philanthropic Studies program at Indiana University.

Session 5B – The Triple-Threat Event: Collaborative Events that Engage, Elevate and Deliver

Description: Looking for a way to inject a strategic approach to events that moves beyond chicken dinners and fundraisers? Today's donor is much more discerning and has an enormous amount of noise to choose from. The Triple-Threat Event is one that engages your prospects, elevates your brand and delivers innovative information to your audience. Join this interactive session to discuss fresh ideas that will help you use events as an effective tool, not a tired old burden you can't seem to shake.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Event Planning

Speakers:

Lisa Aaronson
Bio not currently available.

Katie Lew
Bio not currently available.

Session 5C – Volunteer Management 101

Description: This workshop will present lessons learned from volunteer management at two major on-campus events at Kent State University: a concert featuring Sheryl Crow, O.A.R. and Los Lonely Boys, and a sold out lecture by Elie Wiesel, a noted Holocaust survivor and author. Participants will learn how to identify what volunteers are needed, where to find them, and how to prepare them for their roles, and other important details.

Expertise Level: Suitable for all levels
Shop Size: Large Shop (11+ staff)
Subject Focus: Volunteers

Speakers:

Scott McKinney
Scott McKinney joined Kent State University in 2008, and is currently the director of stewardship and fund administration. In this role, he is responsible for sharing the impact of donations with donors. This includes donor recognition programs and linking donors with student scholarship recipients. He also collaborates with the Office of Student Financial Aid, the Kent State University Foundation, and departments throughout the university to ensure endowment funds are effectively used.

Patty Bujorian
Patty Bujorian started at Kent State University in March 2003. She has experience working in the Human Resources Department, Office of the University Architect, College of Business and has been with Donor Services for the past two years. During her tenure at KSU, she has planned and organized multiple on and off campus events for students, staff, donors and alumni, collaborating with various university departments and outside organizations.

Session 5D – Growing Giving Through Your Stewardship Program

Description: Membership organizations face some unique challenges in encouraging increased giving from our donors. We often operate in competitive spaces and our donors' affinities are often unclear.

Over 60 lively minutes we will examine how a great stewardship program can be used to build a more effective donor pipeline. In particular, we will look at crafting effective communications strategies, increasing engagement opportunities, and creating meaningful giving societies to boost retention and motivate increased support.

Drawing on a variety of case studies, this presentation is sure to provide you with some powerful new ideas.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Jeff Muller
Jeff Muller is the director of donor communications & stewardship at World Wildlife Fund. His team produces strategic work which cultivates and stewards WWF's donors at every level of giving, reinforcing WWF's mission and vision of a world where people live in harmony with nature.

With nearly 20 years of fundraising, marketing and communications experience, Jeff has spent the last decade helping to advance environmental organizations of all sizes. In that time he leveraged all manner of communications - print, video, audio and digital - to build strong relationships and spur programmatic growth.

Session 6: 1:20 p.m. – 2:20 p.m.

Session 6A – The Triple-Threat Event: Collaborative Events that Engage, Elevate and Deliver

Description: Looking for a way to inject a strategic approach to events that moves beyond chicken dinners and fundraisers? Today's donor is much more discerning and has an enormous amount of noise to choose from. The Triple-Threat Event is one that engages your prospects, elevates your brand and delivers innovative information to your audience. Join this interactive session to discuss fresh ideas that will help you use events as an effective tool, not a tired old burden you can't seem to shake.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Event Planning

Speakers:

Lisa Aaronson
Bio not currently available.

Katie Lew
Bio not currently available.

Session 6B – Donor Advised Fund Gifts: What's Fair and What's Foul?

Description: Gifts received from donor advised funds require special understanding and handling. Misunderstanding these rules can have significant negative consequences for the recipient organization, and for the gift administrators and donor as individuals. Understanding the rules surrounding donor advised fund gifts can help to avoid IRS penalties and help to encourage continued giving by generous donors.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop

Speaker: Jo Ann Platt
Jo Ann Platt is an operations and compliance expert specializing in enhancing the performance of non-profit organizations through effective administration, operations improvements, strategy development, communications networking, and best practice implementation. Mrs. Platt's experience spans for-profit and non-profit environments, start-ups, turn-arounds and receiverships.

As the President and Founder of Platt & Associates, Inc., she has served both for-profit and non-profit clients including a $30 million not-for-profit foundation and the North Shore, LIJ Health System, the second largest not-for-profit secular health system in the US. She has served her clients through strategic planning, cost savings enterprises, operations and compliance initiatives and program creation and support. Mrs. Platt has also incubated new non-profits focused on a variety of disease states, emerging medical threats and medical societies.

Mrs. Platt's early carrier includes two successful start-ups in the technology sector, consensus building in the digital music industry, a successful Initial Public Offering (IPO), national marketing and communications programs and brand/product/technology launches.

With a background in accounting, marketing and public relations and legal issues, Mrs. Platt is able to view the needs of each client through multiple lenses and take a global approach to each initiative.

Session 6C – RISDiversity | A Community Narratives Project, a Study in the Fine Art of Storytelling

Description: RISDiversity | A Community Narratives Project allows faculty, staff and students to inspire others online and through an annual exhibit on campus. The project showcases the creativity of the eclectic individuals who make up the RISD community and is a great example of authentic storytelling. A community project of this type could celebrate donors, those who benefit from philanthropy, or both. Learn how the project came together, how it is perpetuated and how it might be translated for other communities from Candace Baer, VP of Human Resources at RISD, photographer Adam Mastoon and ADRP members Amanda Wright and Anne Manner-McLarty.

Expertise Level: Midlevel (2-5 years)
Shop Size: Suitable for any size shop

Subject Focus: Donor Relations Communications

Speakers:

Candace Baer
Candace has over twenty-five years experience in the field of Human Resources and Organizational Development. Currently as Vice President for Human Resources at Rhode Island School of Design (RISD), she serves as a member of the President's Cabinet, co-chaired the President's Taskforce on Diversity and Inclusion and serves as a member of the Diversity Steering Committee. Candace oversees the Human Resources area which is responsible for staff recruitment/retention, employee/labor relations, diversity and inclusion, affirmative action, administration of employee benefit programs, organizational training and development, salary administration, and communication of employment policies and procedures. She came to RISD in 2007 from Smith College where she was the Associate Director of Human Resources.

As a consultant, Candace coaches leaders and facilitates workshops that develop people while providing practical solutions to organizational issues. Candace holds a B.S. in Education and an M.A. in Organizational Communication from Emerson College. She serves on the National Board of the College and University Professional Association for Human Resources (CUPA-HR) and has presented at numerous regional and national conferences.

Adam Mastoon
Adam Mastoon is a photographic conceptual artist, author, and educator deeply engaged by the human story. His work utilizes photography and narrative to build understanding and respect for the value of diversity in communities nationwide. Mastoon's photographs have been exhibited nationally and published internationally. His work expresses his passion for art that can inspire, heal, and help communities know themselves and their individual members in deep and abiding ways.

Amanda Wright
Amanda Wright is the Assistant Director of Scholarships & Donor Relations at Rhode Island School of Design and has served in this role since 2007. She is charged with building and managing a college-wide stewardship program including all aspects of donor recognition, acknowledgement and reporting. As the main liaison with the Office of Financial Aid, Amanda is also very involved with the awarding process for donor-named scholarships and relationship building with scholarship students. She has been focusing on providing close support to the gift officers during the solicitation process to educate and provide resources and opportunities to engage donors and future donors with the College. With the recent completion of the College's first comprehensive Strategic Plan Amanda is increasingly involved in the messaging of new funding priorities, reporting, naming opportunities, events and high-end recognition.

Prior to this role, Amanda started her donor relations career at Dana-Farber Cancer Institute's Division of Development and the Jimmy Fund where she was involved with the Institute's $1 billion capital campaign. Amanda holds a bachelor's degree in both Communications and Creative Writing from Roger Williams University.

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.

Session 6D – Creating Great Reports

Description: Stewardship reporting can be a powerful tool for engaging and inspiring our donors - when done right.

Join in on a lively dialogue about what makes a report great. We will look at the strategic elements of successful reporting, such as understanding your audience, creating the right look and tone, and getting your narrative right. We will also discuss different methods of reporting, including a few creative options. Finally, we will examine the interplay between a report and its cover letter.

Whether you write reports or simply want to better understand another element of effective donor stewardship, you are guaranteed to come away with at least a few ideas you can put to use immediately.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Jeff Muller
Jeff Muller is the director of donor communications & stewardship at World Wildlife Fund. His team produces strategic work which cultivates and stewards WWF’s donors at every level of giving, reinforcing WWF’s mission and vision of a world where people live in harmony with nature.

With nearly 20 years of fundraising, marketing and communications experience, Jeff has spent the last decade helping to advance environmental organizations of all sizes. In that time he leveraged all manner of communications - print, video, audio and digital - to build strong relationships and spur programmatic growth.

Session 7: 2:40 p.m. – 3:40 p.m.

Session 7A – The Creating Optimal Records Everywhere (“CORE”) Campaign

Description: The Creating Optimal Records Everywhere ("CORE") campaign is an organization-wide internal stewardship campaign that was creatively developed using donor-centered principles to reimagine our constituent database. This non-technical presentation features 3 members of the development team, (representing Stewardship, Operations Services and Information Systems) that will speak to the inter-departmental collaboration that successfully identified shared goals and leveraged resources for multiple departments to provide effective and meaningful donor relations. Session attendees will be able to identify strategies to implement a similar internal stewardship campaign (or elements of it) to create a culture of donor-centered data integrity at their organization. Attendees will also be presented with tools to develop a strategic approach to improving donor data clean up, measurement and ongoing maintenance at their organization. This presentation is not technical in nature, and the concepts shared could be applied to a variety of databases and sectors.

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

Speakers:

Anne Marie Halsey
Anne Marie Halsey joined Children's National Medical Center in 2011, and is responsible for the Foundation's policies and procedures, risk assessment, gift agreements and Special Purpose Funds. Previously, Anne served as Manager of Donor Relations at the Smithsonian, where she provided pan-institutional donor relations and stewardship for special projects, major donors and the Smithsonian National Board. Anne¿s eleven years at the Smithsonian included service on the operations and advancement teams. Prior to the Smithsonian, Anne provided research services to immigration attorneys and other non-profits. Anne is a Board member of the Association of Donor Relations Professionals (ADRP), serves as Vice Chair of the Member Experience Committee and a member of the Governance Committee. She is a member of ADRP, AASP, CASE, and AHP. Anne has a MS in Justice, Law and Society from American University, and a BA in Law and Society from Hood College.

Melody Allen McBeth
Melody earned her B.A. in English in 2008. Within months of receiving her degree, Melody was appointed Director of Advancement Services at the Mercersburg Academy. Melody built a reputation for running a clean Raiser's Edge database, a tight team, and a comprehensive suite of standard user-friendly Crystal Reports. In 2010 she started her own consulting firm where she specialized in fundraising process audits. Through her firm, Highland Fundraising Solutions, she even served as an Interim Director for two clients at the same time. In March of 2013 she was selected as the Director of Information Systems and Services at the Foundation for Children's National Medical Center in Washington, DC. She was specifically sought out to head the CORE Campaign: a concentrated data integrity and platform integration project. Prior to paid fundraising operations, Melody spent years working in the sales, hospitality, and healthcare industries, homeschooling her children, teaching self-defense, and coaching Jaycee chapters. After a military legacy of moving 36 times in her life, Melody now lives in PA and MD with her husband, Sam.

Shomari White
Shomari White is currently the Associate Vice President of Foundation Business Operations for Children's Hospital Foundation in Washington, DC where he oversees prospect research, information systems, gift processing, financial reporting, quality assurance and compliance and human resources. He is also responsible for overall management and oversight of the Foundation $30M budget. Prior to his arrival to Children's, Shomari spent 7 years at Verizon where we he served in several senior management roles in finance and data reconciliation, and won numerous management awards for leading the top sales and service call centers in the Verizon Potomac region. At Children's Hospital Foundation, Shomari has not only built the infrastructure to support the organization's successful $500M Transforming Children's Health Campaign, he has also served as acting director of donor development responsible for the management of direct mail, special events, and corporate fundraising. Shomari has a bachelor's degree in business management from Howard University, and an MBA from the University of Maryland University College, Graduate School of Management and Technology.

Session 7B – Retaining and Motivating Employees for their Best Performance

Description: Everyone is talking about turnover, but few shops have a comprehensive approach to keeping their best and brightest. This session will address ways you can build a retention culture, utilizing existing resources and opportunities to ensure your best staff stay. You will leave this session with new ideas, approaches and samples that will support a culture of accountability, high performance, and ways to reward employees outside of compensation. While applicable to all advancement staff, this session will address specific examples to donor relations/stewardship staff as well.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Medium Shop (6-10 staff), Large Shop (11+ staff)
Subject Focus: Professional Development

Speaker Bio: Kathy Drucquer Duff, CFRE
Kathy Drucquer Duff, CFRE has more than 19 years of wide-ranging development experience. As associate vice chancellor at UCSD, Kathy leads the University Development team and serves on the External Affairs management team. Previously, she worked both at Sharp HealthCare Foundation as vice president, philanthropy, and as associate vice president for SDSU. There she oversaw the institution's annual, major gift and gift planning efforts, as well as assisted in developing the institution's strategy for its first comprehensive campaign. Kathy also spent seven years in destination management. A frequent speaker for Academic Impressions, she's also an active volunteer for Girl Scouts.

Session 7C – Octopus Effect: How to Build a Committee that Everyone Will Want to Join

Description: Remember that 4th grade science project when you had to work in a group and there was that one person who was a slacker? Come join us as we share wisdom in recruiting and leading effective committees that work as a team and have fun in the process.

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

Speaker: Heather C. Diehl
Heather C. Diehl is Director of Donor Relations with the San Antonio Area Foundation. She previously worked for the Nature Conservancy of Texas and Bishop Denis J. O'Connell High School in their development departments. She currently serves as the Vice President for Communications for AFP San Antonio. She also was a public school teacher with Fairfax County Public Schools. She holds a Master's of Education from George Mason University and a Bachelor of Arts from Michigan State University. Her volunteer interests include Alamo City Toastmasters and the San Antonio Council for International Visitors. Her passion is helping others achieve their potential.

Session 7D – Designing a Digital Donor Wall on a Budget

Description: Everyone is talking about digital donor recognition. Integrating technology into donor displays can be both engaging and cost effective. Join us to explore three perspectives on digital displays to learn what your options are in the digital scene, how to choose the display that is right for your budget, and how to effectively plan and execute the project.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Acknowledgment

Speakers:

Rebecca Jamison
Rebecca brings Honorcrafts' 50 years of donor recognition experience to the discussion. Her experience combining artful donor walls with passive and interactive visual communications has made her a resource to stewardship professionals. As director of legacy curator, Rebecca has performed extensive donor recognition audits, providing complete digital records of institutional recognition to non-profits of all shapes and sizes. Rebecca has a BA in Marketing and Business Administration from Bentley University and holds a graduate certificate in Sustainable Development from UMASS Dartmouth.

Tiffany Chiang
Tiffany Chiang continues to enjoy the rewards and challenges of working in the nonprofit sector. Over the last 19 years, she has taken on a variety of roles including youth program director, assistant dean of continuing

education, grantwriter/fundraiser and consultant. She has a BA in English Literature from Northwestern University and a MS in Community Economic Development from Southern New Hampshire University. Currently, Ms. Chiang is the director of stewardship with NorthShore University HealthSystem (NorthShore) Foundation.

Ryan Cahoy
Ryan has been involved with digital displays for over 15 years working with universities, healthcare providers, financial firms, and many other organizations to help define how to use display technology to visually communicate. Today, Ryan is focused on business development for Rise Display to help define hardware, software, and content packages for a variety of markets including donor recognition.

Session 8: 4:00 p.m. – 5:00 p.m.

Session 8A – A Minute to Win It, In the Shark Tank, Facing the Firing Line, Special Anniversary Edition with Blooper

Description: 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.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Mary Solomons
Mary Solomons has been in the advancement field for more than 20 years, initially in the alumnae office of her alma mater, Wellesley College. For the past 18 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 has presented at numerous ADRP International Conferences, and has co-chaired the 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 8B – Solo Stewardship: How to Successfully Steward Donors on Your Own

Description: While many donor stewardship professionals are part of a large team or institution with vast resources and large budgets, those of us at small nonprofits find ourselves stewarding our donors without those luxuries. If your role at your nonprofit includes not only Donor Stewardship, but Annual Fundraising and Planned Giving, this session will show you how you can effectively engage donors while you juggle numerous priorities and constantly change hats throughout each day. Join this interactive presentation to learn how you can find creative ways to increase personalization and implement an outstanding stewardship program in 20 hours a week or less.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Small Shop (1-5 staff)
Subject Focus: Stewardship

Speaker: Lisa Rovner
Lisa Rovner has worked in advancement for more than 15 years, and in donor relations for nearly ten. She began her career in arts administration and fundraising, and shifted her focus to stewardship while working at The Ohio State University Medical Center. She currently oversees Donor Relations and Stewardship for BalletMet Columbus, a regional dance company in Ohio. Her work involves creating and implementing high-touch stewardship plans for major individual and corporate donors, overseeing the Individual Annual campaign, and crafting personalized acknowledgement letters to each and every donor.

Session 8C – Building Bridges in Scholarship Administration

Description: This workshop will present the Scholarship Administrator training program offered by the Kent State University Office of Donor Services. Kent State has a decentralized system of awarding scholarships, and this new training program presents standardized information to new Scholarship Administrators. The presentation will also highlight other solutions that have been developed, including an electronic student thank you program, and scholarship administrator list-serv, and other enhancements to access to information and communication.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Scott McKinney
Scott McKinney joined Kent State University in 2008, and is currently the director of stewardship and fund administration. In this role, he is responsible for sharing the impact of donations with donors. This includes donor recognition programs and linking donors with student scholarship recipients. He also collaborates with the Office of Student Financial Aid, the Kent State University Foundation, and departments throughout the university to ensure endowment funds are effectively used.

Session 8D – Rock Your Response Rate

Description: This session will share industry best practices to help you rock your beneficiary gratitude response rate. New perspectives will be provided on how to revitalize your thank you program which took one institution from a 60% to 97% participation rate in just two years. Universities from Colorado, Michigan and Washington, D.C. increased their non-mandatory participation rates through utilizing new platforms for data collection, campus wide collaboration, and deliberate communication strategies. These professionals will be sharing their unique programmatic experiences, leaving you with innovations that you will be able to implement, no matter the size of your shop or budget. During this session there will be opportunities to share your success and challenges. Let's rock it all the way to a 100% participation rate!

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speakers:

Tara Carleo
Tara Carleo, M.A., assistant director of donor relations & stewardship at the University of Denver, is currently pursuing an EdD in Higher Education. She has been striving to meet donor needs and expectations for 10 years, most recently at DU. In her role, Tara provides leadership for and delivery of several key donor programs, manages scholarship donor recognition process, oversees endowment reporting process, creates new stewardship processes, manages various donor special events and serves as donor's point of contact on all scholarship and endowment matters while ensuring donors' wishes are continually being met.

Jeannie Moody-Novak
Jeannie Moody-Novak is assistant director of scholarship stewardship at the University of Michigan. She has spent the past seven years creating memories for scholarship donors on our campus through face-to-face or I-visit meetings with students. In addition to planning the annual multi-school "Celebrating Donors and Their Scholars" event each spring, she provides reporting, acknowledgement, club outreach, fundraising and special scholarship stewardship opportunities for donors who have created scholarships awarded by the Office of Financial Aid. Earlier in her career, she worked in the field of trust and private banking at PNC and has served as a library board trustee in her hometown of Canton, Michigan. In addition to tending scholarships, she enjoys gardening and being a mother to a UM grad and current med student as well as an eight year old.

Shelby Glenn, M.P.S.
Shelby Glenn, M.P.S., is currently the director of donor relations & stewardship at the University of Denver. In her role, Shelby leads her team while working directly with fundraisers, ensuring that all donors are appreciated and recognized for their generosity. She has decades of experience working for organizations such as DU, the Northwest Alliance for Responsible Media, Colorado State University, Arrupe Jesuit High School and other non-profits, where she gained a wealth of knowledge in marketing, public relations, grant writing, fundraising, stewardship, annual fund and event planning.

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.

Wednesday, October 2, 2013

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

Not Your Grandfather's Old Community Foundation!

Description: Community foundations play an interesting role in the philanthropic community, both attracting and retaining funders and managing grantee relationships and expectations. What do foundations look for in grantees, and what do they expect from and appreciate about their grantees? As president and CEO of the Rhode Island Foundation, Neil Steinberg will share his perspectives on these significant donor relations issues and more, including how his foundation's best practices have helped make it Rhode Island's premier philanthropic foundation.

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

Neil Steinberg
Neil came to the Foundation in 2008 from Brown University, his alma mater, where he served for four years as vice president of development and director of the most successful fundraising campaign in Brown's history. For the three decades prior, Neil worked for FleetBoston Financial, where he rose to the position of chairman and chief executive officer of Fleet Bank Rhode Island. A civic leader who has frequently answered the call to service at an array of community organizations, Neil co-chairs Rhode Island's Race to the Top Steering Committee and serves on the trustees of the Greater Providence Chamber of Commerce and the Rhode Island Commodores. In 2010, Rhode Island Monthly named Neil one of Rhode Island's Most Influential People, and in 2011 Providence Business News named him one of Rhode Island business community's top 25 Driving Forces in the last 25 years and one of the 10 most influential leaders in 2011 in the region's business community. He makes frequent public appearance and is often quoted in the press as an authority on philanthropy issues, a commentator on the Rhode Island economic scene, and an advocate for public education.

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

Session 9A (repeat of Session 4C) – Spotlight on Top Donors: Personal and Meaningful Stewardship

Description: Is your high-end donor recognition program all it can be? While each and every benefactor is valued and deserving of appropriate recognition efforts, those who give at the most significant levels require meaningful stewardship. Providing fundamental yet personal communication through custom plans is a recipe for happy donors. Audience members will take with them ideas on how to tailor creative, engaging, and manageable donor appreciation vehicles used to help foster continued and augmented giving.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop

Speakers:

Jo McCourt
Serving as associate director of stewardship and donor relations at Boston University since 2010, Jo McCourt is responsible for gift/pledge agreements, fund establishment, and fund impact reporting, including student and faculty letters of appreciation. Prior to BU, Jo worked in a couple of roles in University Advancement at Boston College for eight years. She oversaw the recipient assignment process for donor-established scholarships, managed the student thank you letter program, produced fund impact reports, and ran donor relations and scholarship recipient events. A Double Eagle, Jo received her bachelor's and master's degrees from Boston College.

Lynne Wester
Lynne Wester is a frequent conference speaker and well known resource for donor relations and fundraising expertise. She has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy and other industry publications. Lynne also created the website and blog www.donorrelationsguru.com where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world and hosts a monthly webinar series. It is her personal philosophy that the goal of any great fundraising operation is to use strategic communications and interactions to foster the relationship between the organization and its constituents and friends. If we are effective with that strategy, they will be engaged in a way that drives them ever closer to embracing the organization's mission and values, they will give their money, time and talents and volunteer to spread that same message with others which will encourage their fellow peers to invest in a way that will enable the organization to further light the world.

Using her expertise and hands on approach, she works with many organizations to help them keep their focus donor driven, technologically savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan. She is currently pursuing her master's degree in strategic fundraising and philanthropy.

Valerie Richardson
Valerie Richardson is a five-year veteran in donor relations at the Yale University Art Gallery. Trained as an artist, she first worked at the Gallery in a curatorial department before transitioning to the Development team.

Mary Fisher
Mary Fisher is an assistant director of stewardship programs within the Department of Development at the University of Notre Dame. In this role, she is actively involved in ongoing donor acknowledgment and recognition efforts, and is presently tasked with enhancing process efficiencies for the production of annual University endowment reports. She has a bachelor's degree from Notre Dame, and is presently enrolled in the University's Master of Nonprofit Administration program.

Session 9B – A Study of Recognition and New Media at the NEWSEUM

Description: Anne Manner-McLarty visited the NEWSEUM at the recommendation of a client, who suggested it as an outstanding example of digital media used for exhibits and storytelling. While this is surely true, Anne noted many other aspects of the visitor experience, including the quality and variety of donor recognition integrated throughout the museum. She has continued to research how these facility-based experiences were designed and implemented, and how they translate to online venues. Join Anne for a virtual tour of what's at the NEWSEUM, her critique of it and a discussion of how these "next practices" might integrate into your work.

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

Speakers:

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.

Emily Nicholson
Emily Nicholson is the Campaign Director for the Newseum. She previously was the Major Gifts and Planned Giving Manager for the Newseum and worked for the First Amendment Center.
Emily is a graduate of Baylor University and has a Masters of Public Administration in Nonprofit Studies from George Mason University.

Session 9C – What Difference Does It Make? Tackling Measurement in Donor Relations and Stewardship

Description: They say that you can't create, understand, manage, or control what you don't measure. In our work in stewardship and donor relations, we carry out many tasks, and we do them well. Commitment to excellence in implementation, however, often overshadows or impedes analysis of whether what we do promotes philanthropy. In this workshop, we'll look at the process of measuring the impact of stewardship and donor relations: where to begin; how to prepare; what to measure and how; why measure; and what to do with the results. We'll consider three areas for measurement: acknowledgment; gift clubs; and donor recognition. Bring your examples and questions.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Metrics

Speaker: Julia S. Emlen
Julia S. Emlen serves as director of development for Community MusicWorks in Providence, Rhode Island. She is also the principal of Julia S. Emlen Associates, a consulting company headquartered in Seekonk, Massachusetts. She has twenty years of experience in advancement and has consulted with institutions across the nonprofit spectrum on resource development. Whether her work is in fundraising, capacity building, strategic planning, or communications, she is acutely aware of the importance of stewardship and donor relations in attracting and retaining philanthropy. She is the author of Intentional Stewardship: *Bringing Your Donors to Their Highest Level of Philanthropy.*

Session 9D – For the Donor Who Has it All, The One-of-a-Kind Gift That Only Your Institution Can Give

Description: What gift do you give the $2 million-plus donor for whom money is no object? What questions should you ask yourself if you want to create the gift that only your institution can give? Learn how to take the standard do-it-yourself photo album (using vendors such as Shutterfly, Blurb Book, etc.) and elevate it into a wonderfully creative, professional-level-quality, story-telling book that resonates with your donor, all within a reasonable budget.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speakers:

Nancy O. Rieger
Nancy O. Rieger, associate director of stewardship at NYU Langone Medical Center, began her career in public relations at Rubenstein Associates and quickly segued into journalism, spending ten years as a reporter/editor at Capital Cities/ABC.

She moved on to become a communications manager/research analyst at her father's investment management firm before deciding to abandon the lucrative financial services sector for the feel-good work of philanthropy. She spent two years at The New York Botanical Garden, managing annual reports and other publications, and has been at NYU Langone since 2007. Ms. Rieger is also a volunteer fundraiser for her alma mater, Barnard College.

Session 10: 1:20 p.m. – 2:20 p.m.

Session 9C – What Difference Does It Make? Tackling Measurement in Donor Relations and Stewardship

Description: They say that you can't create, understand, manage, or control what you don't measure. In our work in stewardship and donor relations, we carry out many tasks, and we do them well. Commitment to excellence in implementation, however, often overshadows or impedes analysis of whether what we do promotes philanthropy. In this workshop, we'll look at the process of measuring the impact of stewardship and donor relations: where to begin; how to prepare; what to measure and how; why measure; and what to do with the results. We'll consider three areas for measurement: acknowledgment; gift clubs; and donor recognition. Bring your examples and questions.

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Metrics

Speaker: Julia S. Emlen
Julia S. Emlen serves as director of development for Community MusicWorks in Providence, Rhode Island. She is also the principal of Julia S. Emlen Associates, a consulting company headquartered in Seekonk, Massachusetts. She has twenty years of experience in advancement and has consulted with institutions across the nonprofit spectrum on resource development. Whether her work is in fundraising, capacity building, strategic planning, or communications, she is acutely aware of the importance of stewardship and donor relations in attracting and retaining philanthropy. She is the author of Intentional Stewardship: Bringing Your Donors to Their Highest Level of Philanthropy.

Session 10B – Driving Success by Thinking Beyond Functional Silos

Description: Key Learning Objectives:
1. A new methodology in how to consider the donor life cycle
2. Measures of success to a holistic, donor-centric fundraising approach
3. Key methods of data analysis and modeling that support a holistic method

Expertise Level: Suitable for all levels
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speaker: Matt McCabe
Matt is one of today's leading nonprofit consultants, with experience spanning two decades helping charitable organizations around the world optimize their online marketing and fundraising, integrated marketing, business process and organizational strategy, direct mail, and media and print campaigns. Currently, Matt serves as senior vice president of consulting services, responsible for leading Pursuant consultants focused on developing integrated and comprehensive fundraising strategies for clients.

A recognized industry expert, Matt is a frequent speaker at nonprofit conferences and also writes for nonprofit trade publications and Web sites. He holds a Bachelor of Arts degree in English and Philosophy from Wheaton College.

Session 10C – What Museum Curators Can Teach Us about Donor Stewardship

Description: How is an endowment like a Picasso? Hint, it's not that both are messy with weird things stuck in odd places. Armed with specialized training in museums and arts management, these multi-year donor relations professionals found some surprising correlations between the core functions of museums and the goals of broad-based stewardship. Taking a cue from museums, we can reframe how we look at endowments and gifts - not just to tell better stories, but to curate inspiring exhibits about the power of philanthropy. We will share some of our own multi-layered stewardship efforts, and ask participants to share some of their inspiring stewardship "blockbusters."

Expertise Level: Suitable for all levels
Shop Size: Small Shop (1-5 staff), Medium Shop (6-10 staff)
Subject Focus: Stewardship

Speakers:

Lynn Sullivan
Lynn Sullivan is the associate director for stewardship and donor recognition at the University of Washington. With over 12 years of experience, she is in charge of implementing new stewardship initiatives for broad-based stewardship. A self-proclaimed data wonk, recovering English major, and museum groupie, her greatest passion is inspiring story-telling.

Gina Glascock-Broze
Gina Glascock-Broze is Assistant Director of Donor Relations for the College of Arts & Sciences at the University of Washington. With undergraduate degrees in English and Fine Arts, and Master's degree in the History of Art and Material Studies from University College London, Gina began her career at the Seattle Art Museum in curatorial as Exhibitions and Publications Coordinator, and has worked in a variety of museum roles since then. Making the switch to the University of Washington and Stewardship in 2010, Gina is building a stewardship program based around story-telling and making meaningful connections with donors, alumni, faculty and students.

Session 10D – The Balancing Act: Unit Stewardship Practices in a Somewhat Centralized, Decentralized System

Description: With the Darla Moore School of Business at the University of South Carolina as our case study, we'll take a look at the increasing influence of a "centralized model" on a decentralized system, from the unit's point of view. Assistant Director of Donor Relations, Marie Berry will discuss the careful balancing act required to meet the school's vision while integrating directives from central development. Cary Henderson, Director of Donor Relations, University Development, and consultant, Anne Manner-McLarty will contribute central development's point of view. Please come ready to share your experiences so we can make this a lively and educational conversation.

Expertise Level: Midlevel (2-5 years), Experienced (5+ years)
Shop Size: Suitable for any size shop
Subject Focus: Stewardship

Speakers:
Marie Berry
Marie Berry is assistant director of donor relations at the Darla Moore School of Business, University of South Carolina.

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.
