

Session Descriptions

Wednesday, July 19, 2017

You Matter and Dare to Think Differently

*David Lasater, Ph.D., Associate Vice President for Advancement
Purdue Research Foundation*

Working in a large organization has its challenges. When everyone has different priorities, goals, and obstacles, there are bound to be issues.

We've all been there. Sometimes we work hard and someone else gets all of the glory. Or, an individual is praised for a success that took an entire team to achieve. It's important to remember that every success requires collaboration and creativity. With a little perspective, positive outlook, and openness to change, everyone has the potential to make a difference. Together, we'll try to figure out how to make every member of the team feel important – even if that means shaking things up and getting out of our comfort zones.

Building a Donor Relations Program from Scratch

Leslie Carmona, CFRE, Wayne State University

This session will focus on how Wayne State University built a Donor Relations program from the ground up. From figuring out where to start, to determining how to best celebrate all levels of giving at your organization, this session will provide examples to help you on your way. Take a journey with Wayne State and find out what worked, what didn't and how we continue to strive to improve our Donor Relations Program!

Complex, Comprehensive Gifts

Liz Elkas, B.A., M.F.A., Indiana University School of Medicine

Blended gifts, the combination of current and future giving, can give donors the flexibility to accomplish their philanthropic goals while providing significant benefits to recipient organizations. Understanding donor motivations and blended gift options is crucial to determining the right gift combination for each donor. In this interactive session, you will learn effective strategies for engaging donors and creating successful blended gifts.

Alumni Board – Structure of Alumni Programs, with Survey

Tina Rice, Tufts University Cummings School of Veterinary Medicine

Erin Palumbo, Tufts University Cummings School of Veterinary Medicine

Alumni boards take many different forms at veterinary colleges. In this session, Tina Rice and Erin Palumbo will share the results of a recent survey Tufts University conducted of all veterinary colleges and the structure and roles of their alumni boards. This interactive session will also include time for attendees to share best practices in alumni relations, what has worked well and not so well.

It's Customer Service NOT Cultivation!

Tammy Barr, Client Advocate, Oregon State University

Joan Campf, Oregon State University VTH Client and Donor

Kelley Marchbanks, Director of Development, Oregon State University

Oregon State took a different approach to its Grateful Client Program. What we learned from our colleagues, why we went a different direction and how we have shared the success of this program

without strapping the college or hospital with major expenses. Hear from the client who led the effort and who proudly put her money where her mouth was to make it all happen.

Participants will walk away with a different perspective on grateful giving, as well as tips and tricks and a customer-service toolkit for implementing program elements into your existing programs.

Transitioning Students to Alumni – Achieving Lifetime Engagement

Elise Betz, Executive Director of Alumni Relations

University of Pennsylvania

This session will give you an overview of a comprehensive approach to student philanthropy/engagement programming, with the objective of creating student understanding and awareness of institutional mission, history and traditions, the financing of higher education, institutional goals, and the role of alumni and students within the greater institutional community. You will leave with tactical things that you can implement at your institution to create a culture of student philanthropy and engagement.

Thursday, July 20, 2017

Indianapolis Zoo Panel

How All the Pieces Fit Together: Capital Campaign from a Staff Perspective

Karen Burns, CFRE, Executive Vice President

Kathy Cookerly, Major Gifts Officer

Marisol Gouveia, Director of Membership & Engagement

Julie McDearmon, CFRE, Director of Institutional Advancement

Judy Palermo, Senior Manager of Public Relations

Ed Sandifer, J.D., Planned & Major Gifts Officer

Dennis Woerner, Director of Marketing & Public Relations

Sally Zelonis, CFRE, Major Gifts Officer

In 2008, the Indianapolis Zoo embarked on a journey with its Campaign for Conservation and Community: Saving the Orangutans. The Campaign, which also included the opening of Tiger Forest in 2011 and Flights of Fancy: A Brilliance of Birds and the renovation of the Zoo's Entry Plaza in 2012, culminated with the public opening of the Simon Skjodt International Orangutan Center on May 24, 2014.

Join us for a panel discussion moderated by Indianapolis Zoo executive vice president Karen Burns. Karen will facilitate a discussion that will include insights from the Indianapolis Zoo fundraising, marketing, membership and engagement, and public relations staff.

Indianapolis Zoo Breakout Sessions

Marketing/Community Engagement

Marisol Gouveia, Judy Palermo, and Dennis Woerner

A closer look at the marketing and community engagement side of the campaign

Major Gifts

Karen Burns, CFRE and Sally Zelonis, CFRE

A closer look at the major gifts side of the campaign

Stewardship

Kathy Cookerly, Julie McDearmon, CFRE, and Ed Sandifer, J.D.

A closer look at the stewardship side of the campaign

The Four Pillars of Donor Communications

Lynne Wester, Donor Relations Guru

Lynne Wester's first book, "The Four Pillars of Donor Relations", addressed the fundamentals of building a best-in-class donor relations shop. In this session, Lynne focuses specifically on the four pillars of donor communications: Gratitude, Impact, Persuasion, and Information. How do you write communications that donors want to read? Who is your audience and what are you trying to convey? Don't try to be all things to all people, but target your message to ensure it resonates with your intended demographic.

Telling the Untold Story of Unrestricted Impact

Lynne Wester, Donor Relations Guru

So many of us do a great job telling the impact of scholarship funds on our organizations. We tell sweeping stories of the impact of a new building. But how do we tell the story of unrestricted or annual fund donors, those which we know are the most important, but whose gifts we don't steward well? Regardless of gift size, today's annual fund donors expect more than a gift receipt acknowledging their contribution. Donors are looking to see the impact their philanthropy, including the collective resources of the annual fund, is having on the institution. As we recognize that retaining donors is essential for long-term success, creating robust stewardship programs for your annual fund gifts across all levels is mission critical. In this session, we will explore the various messages and channels that have proven to be effective stewardship as we work to keep these donors engaged.

Building Trust with Clinicians and Faculty in your Veterinary Teaching Hospital

Melissa Headrick, University of Florida College of Veterinary Medicine

Kristin Loving, Kansas State University College of Veterinary Medicine

Exploring best practices to building trust with faculty and creating a team approach to identifying, cultivating, closing and stewarding gifts.

Keeping up with Communications

Maureen Manier, Purdue University Agricultural Communication Service

With communications in a constant state of flux and after what she describes as "a few" years in the profession, Maureen shares her take on how to stay relevant and to continue to advance in your career.

Surprise & Delight

Lynne Wester, Donor Relations Guru

Your acknowledgement letters bring tears to your donors' eyes, your impact reports make them swell with pride, and your events draw crowds. But what are the highly personalized ways in which you can demonstrate that you know your donors as individuals? "Surprise and Delight" is a phrase coined by development consultant Susan Washburn to describe the little, unexpected ways to engage with your donors.

Taking your Grateful Client program to the Next Level – CRMs, Wealth Screening, Branding and More

Pat Bowdish, University of Wisconsin School of Veterinary Medicine

Danielle Johnson, Ohio State University College of Veterinary Medicine

Take a look at two institutions and how they utilized various tools to elevate their Grateful Client programs to the next level.

Involving Students in the Work of Stewardship, Alumni Engagement, and Crowdfunding

Courtney Downey, Purdue University Bands & Orchestras

Many students are looking for a great cause or program to support during their collegiate experience. Students want to take ownership of a plan, implement an idea, and put a successful project on their resume. Connect them to their passion by soliciting their help for donor stewardship, alumni programming, and online fundraising. Trust them! If they can see the benefit their help could have on your overall program, you will get almost 100% buy-in. Students will then take away valuable information, so you do not have to re-create the wheel when they become alumni.

Friday, July 21, 2017

Building a Culture of Philanthropy

Timothy L. Seiler, B.A., M.A., Ph.D.

Rosso Fellow in Philanthropic Fundraising & Clinical Professor of Philanthropic Studies

Indiana University Lilly Family School of Philanthropy

Building a culture of philanthropy begins with increasing the understanding of fundraising and each team members' unique role in the fundraising process. All members of the organization's team – from each employee to every board member – should be able to understand and effectively express the case for support. Through a discussion of current trends and best practices in higher education fundraising, you will learn ways to increase fundraising engagement throughout your organization.

How Your Role Can Help Philanthropy Change the World: Giving USA Report 2017

Bill Stanczykiewicz

Director of The Fundraising School and Senior Lecturer in Philanthropic Studies

Indiana University Lilly Family School of Philanthropy

Learn the latest about charitable giving during this interactive and inspirational plenary session. The presentation highlights findings from three highly regarded national studies including the latest information on high net-worth donors and their interest in supporting higher education. This session will also provide opportunities for you to share questions and concerns, and learn from your peers in a trusting environment.