



29th Annual Conference  
July 20-22, 2015  
Davidson College, Davidson, NC

## Schedule

Monday, July 20

10 a.m. - 6 p.m.

### **Registration**

*Brown Atrium, Alvarez College Union*

Noon - 1 p.m.

### **Conference Steering Committee Meeting**

*Baxter-Davidson Room, Chambers Building*

1 p.m.

### **Campus Tour—optional**

*Meet in the Brown Atrium, Alvarez College Union*

3 - 4 p.m.

### **Keynote Address from Davidson College President Carol Quillen**

Introduction by Vice President of College Relations, Eileen Keeley '89  
*Lilly Family Gallery, Chambers Building*

4 - 4:15 p.m.

### **Break**

*Snacks available in Lilly Family Gallery, Chambers Building*

4:15 - 5:30 p.m.

### **Breakout Session I**

#### **Session A**

#### **Lessons Learned: A Case Study in Revamping your Recurring Gift Program**

Emily Moser, Bowdoin College, Assistant Director of Annual Giving  
*Open Tutoring Classroom, E.H. Little Library*

This session presents a case study for managing a recurring gift program. Emily will share details of the successes, challenges and lessons learned from implementing a branded recurring gift program at Bowdoin. This interactive presentation is relevant for all annual fund professionals who are tasked with starting or enhancing a recurring gift program, regardless of experience level.

#### **Session B**

#### **Crowdfunding: SO HOT RIGHT NOW**

Jeff Stauch, Middlebury College, Director of Annual Giving  
Jessica Stewart, Oberlin College, Assistant Director for Young Alumni, Annual Giving, and Crowdfunding Initiatives  
*Lilly Family Gallery, Chambers Building*

Crowdfunding is quickly becoming an innovative new tool in advancement circles. It is a way for your community to find creative, personalized ways to raise money, while engaging audiences on your behalf and extending the reach of your organization. While the buzz is merited, crowdfunding does have its limits. Join us to learn how crowdfunding can help your annual giving program, and get insights on how best to utilize this important new form of fundraising.

### **Session C**

#### **How a Fortune 500 Would Market Annual Giving**

Scott Kleinheksel, Claremont McKenna College, Director of Annual Giving

*C. Shaw Smith 900 Room, Alvarez College Union*

Annual Giving shops historically structured their programs around basic communication calendars of solicitations: Fall, Calendar-Year-End, Spring, and Fiscal-Year-End. Success was (and often still is) measured from appeal codes printed on the remit envelope and to the student caller on our end of the phone. However, the challenges we face in Annual Giving are not too different than those of large marketing departments. How do major brands allocate their advertising budgets and measure success of their campaigns? Come learn how our profession can be viewed through the lens of corporate marketing in order to challenge the way you think about solicitations and the broader impact of your departmental programs.

### **Session D**

#### **Beyond the Class Structure: The Annual Fund Regional Approach**

Maria Held, College, Smith Fund Director

*Studio D, E.H. Little Library*

Having learned through alumnae surveys that not all of our more recent graduates affiliate with their class, the annual fund at Smith College has moved beyond the traditional class based model to include a regional engagement and philanthropy approach. In this session, you will hear about the ways in which Smith has dipped its toes into regional marketing, including a regional volunteer program. Results of the first two years of efforts will be shared.

5:45 p.m.

#### **Welcome Reception**

Wear gear from your institution

*Vail Commons Dining Hall & Back Patio*

6:30 p.m.

#### **Dinner**

*Vail Commons Dining Hall*

8 - 10 p.m.

#### **Lawn Games**

*Vail Commons Back Patio*

Tuesday, July 21

8 - 9 a.m.

#### **Breakfast Roundtable Open Discussions**

*Brown Atrium, Alvarez College Union*

9 - 10:30 a.m.

#### **Plenary Session I—Engaging Diverse College Alumni**

Marybeth Gassman and Nelson Bowman

*Lilly Family Gallery, Chambers Building*

Every year, the United States is becoming more racially and ethnically diverse. This is reflective of two forces. First, immigration has been a major influence on both the size and the age structure of the U.S. population. Second, major racial and ethnic groups are aging at different rates, depending upon fertility, mortality, and immigration within these groups.

As a result of these changing demographics, fundraisers need to modify their “one size fits all” cultivation approach in order to capture or in some cases recapture the affinity of many of their minority constituents. While this may seem like a no-brainer, the fundraising establishment and supporting research have been reluctant to formally recognize and incorporate these changes into the standard fundraising model.

“The U.S. traditional models and expectations of charitable giving were developed by white men, and these may not reflect philanthropy in other cultures because minorities do not give for the same reasons white men do.” —Wagner & Ryan, 2004, p. 66.

As fundraisers, are we prepared for these changes? Are the organizations we work for embracing this transformation? Is there a true understanding of how people of different racial and ethnic backgrounds think about philanthropy and what motivates them to give?

The session will focus on the four major racial and ethnic groups and provide a rich understanding of philanthropy and fundraising strategies in diverse contexts. It will also touch on gender, differentiating the giving habits of men and women within these racial and ethnic categories.

10:30 - 10:45 a.m.

**Coffee Break**

*Snacks available in Lilly Family Gallery, Chambers Building*

10:45 a.m. – Noon

**Breakout Session II**

**Session E**

**Engaging Diverse College Alumni II**

MaryBeth Gassman and Nelson Bowman

*Lilly Family Gallery, Chambers Building*

Whereas predictions suggest that over the next 40 years, minorities will become the new majority in the country, the fundraising profession is not very reflective of these forecasts, as its demographics continue to remain unchanged. This shift in population is already having a substantial impact on our college and university’s diversity make-up, which suggests more people of color, will be included in tomorrow’s alumni base.

One could argue that having fundraisers of color is not an absolute requirement for cultivating people of color. However, our research shows that people of diverse backgrounds and ethnic groups tend to embrace and, in many cases, prefer to be cultivated by those of the same race or ethnicity. Question: In business, when companies notice that the demographic they cater to is changing, they quickly adjust the marketing, packaging and personnel to ensure no loss of and the possibility of increased sales. So why would an institution of higher education, sharing a similar need of wanting to increase funding not follow that same business model?

This session will focus on strategies for cultivating fundraisers of color as well as highlight examples of other institutions that are experiencing success with their choice to diversify.

**Session F**

**The Gift that Keeps on Giving: Senior Gift Programs and Transitional Student Programming**

Nina Emmi, Bates College, Associate Director of Annual Giving

*Room 1062, Chambers Building*

For years, Bates College has used its Senior Gift program to engage students in philanthropy, before they leave campus. This program, through a number of iterations, has become a signal of the transition from student to alumnus/a and is often the student's first opportunity to give back to the Bates community. Engaging seniors has led to high giving rates for the Senior Class Gift effort and ensures that the first year transition to alumni status is easy and familiar. During this session, the history of the senior gift at Bates and our partnership with on-campus affiliates will be discussed.

## **Session G**

### **Scrap That!: Rebuilding a Class Agent Program**

Danielle Nelson, Macalester College (Guest School), Director of the Annual Fund  
*Hance Auditorium, Chambers Building*

Class Agent volunteers play a vital role in development's efforts to increase the number of peer to peer solicitations. For a program to be successful, it must be nurtured. However, this nurturing comes with a significant investment of staff and financial resources. In FY14, Macalester's Annual Fund faced a hard reality: its Class Agent program was not working. After substantial feedback collection via survey, focus groups and research on best practices for volunteer engagement, a new program was formed. In this session, learn about the process of evaluation, design and implementation of the new program and the initial successes and challenges Macalester has faced in this new iteration.

## **Session H**

### **Communication and Engagement through Challenges**

Ben Ralston, Davidson College, Associate Director of Annual Giving,  
*C. Shaw Smith 900 Room, Alvarez College Union*

In brainstorming how to make our one-day challenge most effective, we came up with a lot of new ideas that neither we nor other schools have tried before. Our challenge became a proving ground for all of those new ideas including our new crowdfunding platform, social media strategy, and call center structure. Come find out which ideas were bold enough to work and which ones were too bold to try again.

Noon - 1:30 p.m.

### **Assistant/Associate Director and Guest Lunch**

*Brown Atrium, Alvarez College Union*

Noon - 1:30 p.m.

### **Director Working Lunch (Directors and Acting Directors of STAFF member schools)**

*Room 209, Alvarez College Union*

1:30 - 2:45 p.m.

### **Breakout Session III**

## **Session I**

### **Reunion Giving 101**

Skyлар Beaver, Washington & Lee University, Director of Annual Giving  
*Lilly Family Gallery, Chambers Building*

Want to leverage your school's class reunion program to increase giving and maximize participation? Join W&L staff members to learn how to use these milestone reunions and all the ones in between to further engage current donors, attract news ones, and secure multi-year pledges for an ongoing giving cycle. In this session, we will discuss strategies we've used to broaden our donor base, challenge alumni in reunion years to increase their giving to meet ambitious goals, and to collaborate effectively with the Alumni Office so the reunion experience is well balanced, fun and successful. We also will share what we have learned about working effectively with large reunion committees to help each class meet the goals of a comprehensive reunion program—attendance, fundraising, and class gift participation.

## **Session J**

### **Don't Walk the Plank! Getting (and Keeping) Your Boards on Board**

Maggie Patrick, Carleton College, Director of the Alumni Annual Fund

Kelly Rowan, Carleton College, Senior Associate Director and Alumni Annual Fund Leadership Giving Program Director

*C. Shaw Smith 900 Room, Alvarez College Union*

This session is about how to develop a healthy, empowered alumni volunteer board and how that board can in turn energize and empower a larger group of volunteer class agents to

undertake fun, meaningful fundraising programs with their peers. We will cover the advantages and challenges of such a model and suggest ways for integrating the board's work with professional staff.

### **Session K**

#### **Ready? Set? Give! Parent Giving and Engagement**

Keatley Scroggins, Davidson College, Director of Parent Giving  
*Room 1062, Chambers Building*

Each year, a new crop of parents arrive eager for their students' college experience. Parents will navigate the next four years with their children via active involvement on campus, social media or philanthropy. In many ways, parents are a renewable resource and ready to ensure (and even 'insure') students' academic success. This facilitated group discussion will explore cultivating parents on an accelerated timeline, potential volunteer structures that promote philanthropy, and disarming objections to giving on top of tuition. Come ready to share best practices in Parent Giving and Engagement.

2:45 - 3 p.m.

### **Ice Cream Break**

*Snacks available in the Brown Atrium, Alvarez College Union*

3 - 4:15 p.m.

### **Breakout Session IV**

### **Session L**

#### **Making the Most of Your 50th Reunion**

Amy Leveen, Barnard College, Director of Annual Giving  
Dawn Williams, Barnard College, Senior Associate Director of Annual Giving  
*Open Tutoring Classroom, E.H. Little Library*

Learn how your colleagues are increasing 50th Reunion class income and attendance with targeted support. Areas of discussion include fundraising sub-committee structures, integration of fundraising into overall reunion planning, collaboration with major gift staff to best target alumnae for leadership, special, and planned gifts.

### **Session M**

#### **Building a Donor Pipeline: Establishing Consistent Giving in Young and Second-Decade Alumni**

Julia Gelman-Sheehan, Haverford College, Assistant Director of Alumni and Parent Relations  
Doug Stuart, Haverford College, Associate Director of Annual Giving  
*C. Shaw Smith 900 Room, Alvarez College Union*

The majority of alumni donors less than 20 years out will be making participation-level gifts. Retaining their participation long-term will pay huge dividends for all other development activities at our institutions, though. Haverford College has spent the last five years (pre-campaign launch) targeting improved participation among alumni 1-19 years out through challenges and other tactics to renew, reactivate, and acquire young donors. We will share advice and best practices that we have learned along the way to help your youngest alumni become your most loyal.

### **Session N**

#### **Getting the Most Out of STAFF Data**

Steve Rittler, Founder & CEO of AlumnIQ (formerly known as from CounterMarch Systems)  
*Studio D, E.H. Little Library*

As a group, we spend a lot of time gathering and entering data into the STAFF portal. We'll show you how to find the data you need (from the benchmarking and compensation survey systems) when you need it—and probably show you a few things you hadn't noticed before along the way—so next time you need a data point you'll be ready to rock.

- 5:30 - 7 p.m.           **Reception**  
Featuring live music from Sunday Union.  
*Patio in front of Lilly Family Gallery*
- 7 - 8 p.m.               **Dinner**  
*Lilly Family Gallery*
- 8 - 10 p.m.             **Trivia**  
Hosted by Nick Upright (Davidson College, Class of 2014). Cash bar available.  
*C. Shaw Smith 900 Room, Alvarez College Union*

Wednesday, July 22

- 8 - 9 a.m.               **Breakfast Roundtable Open Discussions**  
*Brown Atrium, Alvarez College Union*
- 9 - 10:15 a.m.         **Plenary II— Fully Engaged: Thriving in the Workplace**  
Randy Hall  
*Lilly Family Gallery, Chambers Building*  
This interactive presentation will deal with many of the challenges associated with the workplace, including building relationships, keeping your level of engagement high, and making an impact with the work that you do. It is not easy showing up fully engaged and bringing our best self to work every day, but this discussion will explore strategies that can help us do that more consistently.
- 10:15 - 10:30 a.m.     **Coffee Break**  
*Snacks available in Lilly Family Gallery, Chambers Building*
- 10:30 - 11:45 a.m.    **Breakout Session V**
- Session O**  
**People: Finding Them, Developing Them, and Keeping Them Engaged**  
Randy Hall  
*Lilly Family Gallery, Chambers Building*  
This workshop will explore ways that you can build a stronger team, improve retention, and increase employee engagement. A leader's ability to recruit, develop, engage, and retain great people ultimately determine the success of the organization and the success of the leader. Learn strategies for consistently helping your team get stronger and accomplish more.
- Session P**  
**FebruMary— Putting the "Fun" in Fundraising**  
Beckie Markarian, Mount Holyoke College, Senior Officer, Student Philanthropy and Young Alumnae Programs  
*Studio D, E.H. Little Library*  
This session will take you from the initial brainstorming to practical planning and inspire ways to launch a comprehensive campaign aimed at increasing participation while highlighting the role of philanthropy at your institution (the money will follow!).
- Session Q**  
**Don't Ask for \$5, Ask for Five Minutes: The Impact of an Education-Based Senior Gift Program**  
Neli Vazquez, Bowdoin College, Alumni Fund Associate

*Open Tutoring Classroom, E.H. Little Library*

Bowdoin's Senior Class Gift Campaign is an education-based program driven by the recruitment, training, and management of volunteers. Through this program, 100% of the senior class is assigned to a peer who will educate them about the importance of giving back, answer any questions they have about giving, and solicit their first gift to the college. During this session, we will discuss what an education-based and peer-to-peer senior gift program looks like in practice, the challenges that arise, and the long-term impact of this approach. At the conclusion of the presentation there will be time for Q&A.

### **Session R**

#### **Volunteers for Hire—A Group Share on Volunteer Management**

Makiva McIntosh, Denison University, Director of the Annual Fund

*C. Shaw Smith 900 Room, Alvarez College Union*

Oh, volunteers! We love them and, well, admit it...sometimes we don't. Volunteers are the lifeblood to much of our work in the Annual Fund. This session will serve as a moderated large group discussion around the pitfalls to avoid and the volunteer program revamps to triumph. Together as a group, we will identify some hot topics around volunteer management to discuss, so come to the session armed with details on your own best practices; hang-ups; and hopes and dreams for volunteers and be ready for a robust group discussion to help propel you into your best volunteer management year yet!

11:45 a.m.

#### **Farewell Boxed Lunch**

*Brown Atrium, Alvarez College Union*

Noon - 1 p.m.

#### **Conference Steering Committee Meeting**

*Arthur Vining Davis Room (Room 313), Alvarez College Union*