

## **18th Annual STAFF Conference**

**July 13-15, 2003**

**Union College**

### **Strengthening Connections: Sustaining a Culture of Philanthropy**

Note: Some sessions are meant for an audience new to Annual Fund or development work. Others are meant for an audience with three or more years of experience. In those cases, sessions are noted with a 101 (newcomers) or 201 (more experienced) in the title.

#### **Sunday, July 13, 2003**

Noon Conference Planning Committee Meeting & Luncheon  
Reamer Campus Center 203

#### **2:00 – 5:00 Registration**

Reamer Campus Center Foyer

#### **3:30 Reception and Orientation for Session Presenters**

Reamer Campus Center – meet in Foyer

#### **4:00 Mentoring Sessions**

Dutch Hollow at Reamer Campus Center

Mentors are paired prior to the conference. If you signed up for this great opportunity, please attend this reception.

#### **5:30 Welcome Reception**

Nott Memorial

#### **7:00 Dinner**

Old Chapel

Welcome: Tom Gutenberger, Vice President for College Relations, Union College

Keynote Speaker: Mark L. Walsh, Managing Partner, Ruxton Associates, LLC

“Asking for the Order: Some Thoughts on Real World Marketing Tactics in Tough Times”

**10:00-2 a.m. Trolleys into town for informal gatherings and networking.**

**Hospitality Suite open in dormitory.**

#### **Monday, July 14, 2003**

**8:00 a.m. Breakfast**

Upperclass Dining Hall

Roundtables:

- Annual Restricted Giving
- Matching Gifts

**8:30 – 9:45 Breakout Sessions I****The Young Ones – Rising to the Participation Challenge 101 Olin Auditorium**

Kristen Andersen, Assistant Director of Annual Giving, Bates College

James Montano, Senior Associate Director of Annual Giving, Trinity College

It's never too early to start! This session will cover undergraduate initiatives, Senior Class Gift and young alumni/ae strategies.

**Reunion 101**

Social Sciences 103

Kathy Marcello, Director of Annual Giving, Dickinson College

Beth Roche, Associate Director of Annual Giving, Skidmore College

How can we capitalize on reunions? If you are just getting started with Reunion Giving, or are thinking about changing your approach, this session is for you. Learn how to recruit your committee, create the ultimate gift pyramid and coordinate your efforts with Alumni Relations.

**Reunion 201**

Social Sciences 104

Rick Greene, Associate Director of Annual Giving, Middlebury College

Sue Regier, Director of Annual Giving, Middlebury College

Take it to a higher level... Now that the foundation for your Reunion program is in place, come discuss how to use challenges, include planned giving in your efforts and allocate staff resources.

**Working with Leadership Volunteers 201**

Olin 107

Jocelyn Kane, Director of Annual Giving, Trinity College

Diane Robbins, Leadership Gifts Officer, Wheaton College

Trustees, Reunion Chairs, Campaign Committee members, etc. How can you turn your leadership donors into your best leadership volunteers? Discussion points will include how to gain access to the "top", coordinating with major gift staff and using leadership gifts as leverage.

**9:45-10:00 Coffee Break**

Olin Rotunda

**10:00 – 11:00 Plenary Session I**

Branding the Annual Fund - How to Present Your Message  
Olin Auditorium

Bob Burdenski, Managing Associate at Bentz Whaley Flessner

A consultant since 1996, Bob joined Bentz Whaley Flessner in 1999. Bob has earned a national reputation for his work with annual giving and direct marketing programs, alumni relations and constituent market research. Before moving into the consulting world, Bob was director of annual giving and then director of university development at Cleveland State University, vice president for development at Catholic Charities Corporation in Cleveland and chief development officer at Notre Dame College of Ohio. *For further discussion, please attend the Branding/Messaging breakout session at 11:15.*

**11:00-11:15 Coffee Break**

Olin Rotunda

**11:15 – 12:30 Breakout Sessions II**

**21st Century Fundraising**

Olin 107

John Murphy, Director of Annual Giving, Hamilton College

Kelly Dodge, Associate Director of Annual Giving, Colby College

Email solicitations, listservs, on-line giving, on-line communities. What works? What doesn't? Come to discuss and be ready to share your successes and challenges.

**Volunteers AKA the Lifeblood**

Social Sciences 103

Mariah Wright, Assistant Director of the Annual Fund, Denison University

What would we do without volunteers? From recruiting to training to stewardship, this session will cover it all.

**The Creative Bent: Getting the Most of Direct Mail**

Social Sciences 104

Amy Boeke, Director of Annual Giving, Gettysburg College

Jenifer Nesbit, Associate Director of Annual Giving, Gettysburg College

You've seen all of the materials on the distribution table, now come learn how they are put into action. This session will cover creating a mail schedule, producing materials and stretching your budget as well as how to get your materials read and remembered. Bring your favorite Tricks of the Trade!

**Branding/Messaging Follow-Up Discussion**

Olin Auditorium

Bob Burdenski, Managing Associate at Bentz Whaley Flessner

This session will continue the discussion begun in Plenary Session I.

**12:45 – 2:15 Informal Lunches**

**Directors**

Everest Lounge  
John Murphy, Hamilton College, facilitator

**Associate Directors**

Hale House  
Kelly Dodge, Colby College, facilitator

**Assistant Directors**

Old Chapel  
Arianne Gates, Union College, facilitator

**2:45 – 4:15 Plenary Session II**

Panel Discussion: Managing Your Career in Development

Olin Auditorium

Jocelyn Kane, Trinity College, Moderator

Participants:

Henry Eberhardt, Director of Annual Funds and Special Gifts, Mount Holyoke College

Karin George, Vice President for Advancement, Smith College

Tom Molloy, President, Molloy Partners

Sue Washburn, Partner, Washburn & McGoldrick (former Vice President for Advancement, St. Lawrence University)

**5:15 pm Leave for dinner at Glenn Sanders Mansion (bus service provided)**

Busses will depart promptly at 5:15 from the Nott/Seward Parking Lot

5:30 Cocktails

6:30 Dinner

**10:00-2 a.m. Trolleys into town for informal gatherings and networking.**

**Hospitality Suite open in dormitory.**

**Tuesday, July 15, 2003****8:00 a.m. Breakfast**

Upperclass Dining Hall

Roundtables:

Time Management

Managing Your Career follow-up discussions

**9:00 – 10:15 Breakout Sessions III****Phonathons**

Olin Auditorium

Ashley King, Assistant Director of Annual Giving, Davidson College

Matthew Palmateer, Assistant Director of Annual Giving, Hobart and William Smith  
Colleges

How can you make the most of every Annual Fund solicitation phone call? Both Student Calling and Volunteer Phonathons will be covered in this session.

Davidson recently automated their student calling program – come to hear what that could mean for your institution!

### **Strategic Planning and Management 201**

Social Sciences 103

Leslie Ford Weber, Consulting Vice President, Grenzebach Glier & Associates  
This session will begin with how to put together a plan that works. But once the plan is in place, then what? Discuss how to measure your success, diagnostic evaluations as well as tried and true reporting tools.

### **Travel 201**

Social Sciences 104

Cassie Ritter, Director of Annual Giving, Washington and Lee University

Chris Clark, Director of Annual Giving, Carleton College

We all have to do it – how can you make the most of traveling? Balancing travel and office work, utilizing key volunteers to make your travel most efficient and beginning to make the capital ask are just a few of the topics to be covered.

### **Parents 101**

Olin 107

Deb Wiediger, Associate Director of Annual Giving, Dickinson College

JoAnn Usher, Director of Annual Giving, Kenyon College

The basics will be covered in this session. Learn how to create a four-year plan, engage parents who are also alumni/ae and recruit key volunteers.

### **10:15-1030 Coffee Break**

Olin Rotunda

### **10:30 – 11:30 Planning Session for STAFF 2004 Conference**

Olin Auditorium

### **11:30 Lunch**

Jackson's Garden (behind Reamer Campus Center)

### **12:30 Conference Planning Committee Meeting**

Meet at Jackson's Garden

2:00 Conference Adjourns