

21st Annual S.T.A.F.F Conference

July 16-18, 2006

LaFayette College, Easton, PA

**Sunday, July 16, 2006**

**11 a.m. - 1 p.m. Conference Planning Committee Meeting & Luncheon**  
Pfenning Alumni Center, Room 109

**1:00 - 4:00 p.m. Conference Registration**  
Pfenning Alumni Center, Lobby

**5:00 - 7:00 p.m. Late Registration**  
Williams Center for the Arts, Lobby

**5:30 - 6:30 p.m. Welcome Reception**  
Williams Center for the Arts, Lobby

**6:30 p.m. Dinner**  
Pfenning Alumni Center, Wilson Room  
Welcome: Joe Samaritano, Lafayette College

**8:00 p.m. Plenary Session I - Identifying Opportunities for Growth through Data Analysis**  
Oechsle Hall, Room 224

Page Albrecht, Target Analysis Group  
This session will focus on how to use data mining to gain a better understanding of your donor file. We'll look at how to uncover weaknesses and strengths, and how to turn that information into actionable strategies.

**10 p.m. - midnight Informal gathering and networking**  
Bus transportation will be provided until midnight.

**Monday, July 17, 2006**

8:00 a.m. Breakfast and Mentoring Session  
Pfenning Alumni Center, Wilson Room

**8:30 - 9:45 a.m. BREAKOUT SESSION I**

**Travel 101**

Oechsle Hall, Room 223

Carolyn Kimberlin, Associate Director of Annual Giving, Colby College

Erin Martin, Assistant Director of Annual Giving, Bowdoin College

Whether you have just begun traveling or are looking for some helpful pointers to make your trips more productive, come explore the many facets of Annual Giving travel. From volunteer engagement to solicitations, we all have many reasons to be on the road, but for most, getting there can be half the battle! We'll provide pointers on who to visit, what to bring with you, how to juggle the time out of the office, and much, much more.

### **The Annual Fund On-Line**

Oechsle Hall, Room 224

Jason McCahan, Annual Fund Manager, Bucknell University

Elizabeth Parker, Senior Associate Director of Annual Giving, Wellesley College

Amy Michelson, Manager of Resources Information Systems, Wellesley College

This session will explore the successful ways some schools have reached their donors and volunteers on-line. Topics will include coordinating your web site with printed materials and using your site to motivate volunteers. In addition, we will explore the advantages and challenges of using an on-line portal for alumni and volunteers.

### **Top of the Pyramid**

Williams Center for the Arts, Room 108

Ryan Hart, Director, Vassar College

Skip Nordhoff, Wheaton College

Prospecting strategies for leadership giving societies. How do we grow our programs? Where will our next major prospect come from? What constitutes a major gift? Are our gift club levels appropriate or should they be changed? How to you market that change?

**9:45 - 10:00 a.m. Coffee Break, Oechsle Hall Lobby**

### **10:00 - 11:00 a.m. PLENARY SESSION II - SNAP JUDGEMENTS**

Oechsle Hall, Room 224

Mike Weinstein, INOV8 Beverage Company, LLC

Mike Weinstein is known as one of the most dynamic speakers in the beverage industry. His down-to-earth, casual style and irreverent sense of humor have made him a favorite presenter at management conferences throughout the country.

Mike's speech will outline the lessons from the history of Snapple and is entitled Snap Judgments. It's a fast-paced forty-five minute talk complete with historical slides, old TV commercials and unique learnings from the rise, fall and rescue of Snapple.

**11:00-11:15 a.m. Coffee Break, Oechsle Hall Lobby**

**11:15-12:30 p.m. BREAKOUT SESSION II**

**Direct Mail**

Oechsle Hall, Room 223

Casey Peterson, Hobart & Williams Smith

Shawn Dailey, Kenyon

This session will explore the use of variable imaging in direct mail developing a year-long appeal strategy as well as the pros and cons to offering designations within the annual fund besides unrestricted. (Kenyon won a Silver CASE award for their use of variable data in direct mail.)

**Alumni in Training: Current Student Programs**

Oechsle Hall, Room 224

Craig Arteaga-Johnson, Director of Annual Giving, Pomona College

George Tiggler, Assistant Director of College Relations and Annual Giving, Union College

We will describe specific strategies for four key areas of student calling programs: caller recruitment, caller training, getting the most out of your student managers and ensuring call quality. We will also open up the discussion so attendees can share ideas from their own programs. Then we'll turn our attention to student giving programs and compare four-year giving programs with more traditional senior-year gift campaigns. As a group, we will discuss whether any of these programs are truly effective in creating "habits of giving" that continue after graduation.

**Little Things Matter When It Comes to a Successful Stewardship Strategy**

Williams Center for the Arts, Room 108

Beth Dahle, Senior Associate Director of the Alumni Annual Fund, Carleton College

John Murphy, Director of Annual Fund Leadership, Hamilton College

From Bringin' Home the Bacon Award, Givemail, pancakes with the Prez, Low Hanging Fruit Challenge, to handwritten student thank you's and acknowledging first gifts from nevers, it all adds up. John and Beth will share some of Carleton and Hamilton's little secrets when it comes to recognition and stewardship of volunteers and donors, and look forward to hearing yours!

**12:45 - 2:15 p.m. Informal Lunches, Pfenning Alumni Center, Wilson Room**

Directors (Wilson Room South)

Associate Directors and Assistant Directors (Wilson Room North)

**2:45 - 4:15 p.m. Plenary Session III****Adding Science to the Art of Fundraising - Donor Relationship Management Metrics to Identify Growth Opportunities**

Oechsle Hall, Room 224

Connie Cervilla, CORE

Connie will discuss new tools and metrics - Donor Relationship Management Metrics - to augment the more traditional ways of identifying growth opportunities for Annual Fund Programs. We will discuss the close tie between eventual most generous donors and Annual Fund Programs. How are eventual most generous donors different from other donors and can we identify them earlier in their life cycle using these differentiating characteristics? What does that suggest for the "right metrics" to be used in Annual Fund analyses? How can we use these kinds of models to prioritize our annual fund resources and to build continuous innovation into our programs?

**6:30 p.m. Reception, Hotel Bethlehem**

**7:30 - 10:00 p.m. Dinner, Hotel Bethlehem**

**10:00 p.m. - midnight Informal gathering and networking**

Bus transportation will be available until midnight.

## **Tuesday, July 18, 2006**

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

Pfenning Alumni Center, Wilson Room

**9:00 - 10:15 a.m. BREAKOUT SESSION III**

### **From Happy Hours to \$1,000: G.O.L.D. (Graduates of the Last Decade) Programs**

Williams Center for the Arts, Room 108

Mary Livingston, Assistant Director of the Wesleyan Fund, Wesleyan University

Alli Lambert, Alumni & Parent Programs Coordinator, Bates College

Colleen Boyce, Assistant Director, St. Lawrence University

Young alumni involvement during the first ten years out is crucial to their long-term engagement as donors and volunteers. We will share some of our experiences with GOLD programming and communications, including events, leadership giving, Reunion planning and fundraising, and volunteer opportunities.

### **Flash Email**

Oechsle Hall, Room 224

Kristy Kerin, Assistant Director of Annual Giving, Middlebury College

Stephanie Winkler, Assistant Director of Annual Giving, Middlebury College

Sarah Conlon Curtis, Director, The Annual Fund, Colgate University

More and more schools are experimenting with flash e-mail. What do you need to know to begin the process? What are some of the advantages and disadvantages? What is the expense? Who is your target audience, and how do you cater to their interests? What is the lifespan of this type of appeal? How can you make this an interactive experience for your donors?

**Post Reunions**

Oechsle Hall, Room 223

Barbara Knauf, Assistant Director, St. Lawrence University

Kimberly Hokanson, Director, Bates College

Maria Tardugno, Director, Davidson College

What do your post reunion class participation numbers look like? Is the drop in donors significant? Is it difficult to retain your class volunteers once the reunion has past? This session will be an open discussion of strategies, including challenges, to help keep alumni engaged the year(s) after their reunion.

**10:15 - 10:30 a.m. Coffee Break, Oechsle Hall Lobby****10:30 - 11:30 a.m. Planning Session for STAFF 2007 Conference at Bowdoin College**

Oechsle Hall, Room 224

Complete your 2006 evaluation and offer feedback for next year's conference.

**11:30 a.m. Lunch, Pfenning Alumni Center, Wilson Room****12:30 p.m. Conference Planning Committee Meeting**

Pfenning Alumni Center, Room 109