



STAFF

Sharing the Alumni Fund Fundamentals

22nd Annual Conference

July 15-17, 2007

Bowdoin College, Brunswick, Maine

Sunday, July 15, 2007

- 3:00 - 4:30 p.m. Conference Planning Committee Meeting (*Planning Committee members only*)
Hutchinson Room, Thorne Hall
- 3:00 – 8:30 p.m. Conference Registration
Thorne Hall Entry
- 5:30 – 6:30 p.m. Opening Reception
Hubbard Hall
- 6:30 p.m. Lobster Bake and Welcome
Daggett Lounge, Thorne Hall
- 8:00 p.m. **Keynote Speaker**
"Through the Looking Glass"
Randy Helm, President of Muhlenberg College
Prior to being named president of Muhlenberg, Randy Helm worked in Development for a number of years and was a CASE faculty member and presenter on a wide range of advancement issues. His remarks to STAFF will address his changing perspectives on Annual Giving and on participation from the other side of the desk
- 9 p.m. – midnight Informal gathering and networking on campus
Jack Magee's Pub, David Saul Smith Union

Monday, July 16, 2007

- 7:30 – 8:30 a.m. Breakfast
Main Lounge, Moulton Union
- 8:30 – 9:45 a.m. **Breakout Session I**
Putting Their Mouths Where the Money Is: Making the Annual Fund a Priority for College Leadership
Sue Regier, Director of Annual Giving, Middlebury College
Craig Arteaga-Johnson, Director of Annual Giving, Pomona College
Druckenmiller 020

For an annual fund to be successful, it needs vocal support from all levels of college administration. What are the strategic actions your vice president, president, trustees and other members of college leadership can take to heighten the profile of your annual fund? What are the important external and internal constituencies you need them to motivate? What are the best ways to ask for their help (and should you even have to)? This session will answer these questions by looking at successful practices from a number of schools and through group discussion.

Future Trends in Annual Giving

*Bob Burdinski, Principal, Robert Burdinski Consulting Group
Druckenmiller 016*

Bob is recently back from working with clients and contributing as a faculty member at CASE Europe. This session will address trends that Bob sees, and get feedback from you as to which direction annual giving is headed in the coming years. Are there new technologies available, or will we be staying with the tried and true? Come hear what Bob's crystal ball is telling him.

The Nitty Gritty

*Emily Bray Levine, Associate Director of Annual Giving, Bowdoin College
Susan Sheehan, Director of Reunion and Class Giving, Vassar College
Druckenmiller 004*

From online giving to pledge reminders to recurring gifts and more – how can we continue to make it easy for donors to make gifts? Come with your questions but also ready to share what strategies have worked for you.

Parent Leadership

*Pamela Phillips, Director of Parent Giving, Bowdoin College
Deborah Deveaux, Assistant Director of Parent Giving, Bowdoin College
Kanbar Hall 107*

How do successful Annual Fund programs identify leadership parent prospects and how aggressively are they solicited? What are effective volunteer structures for parents? Since 1990, the Parents Fund at Bowdoin College has grown from \$185,000 to more than \$1.4 million – come hear about the strategies that made this growth possible.

9:45 - 10:00 a.m.

Coffee Break
Kresge Lobby, Visual Arts Center

10:00 – 11:30

Plenary Session I

Now What?! Your Biggest Donor is Withdrawing Because of . . .

*Doris Smith, Principal, Doris K. Smith and Associates
Kresge Auditorium, Visual Arts Center*

Controversies and crises occur at every institution and they can have a profound impact on development efforts. Senior administration and your internal communications director set the strategy, but how do you as a member of the front line communicate persuasively about the Annual Fund? This session will give tips and tools to help head off some crises before they occur, manage them during the “fury,” and heal relationships in the aftermath. The audience will help in analyzing crisis examples as we extract basic principles to show common errors and provide guidance for future situations.

11:30 -1:00 p.m.

Informal Lunches/Working Lunch
*Directors only, Lancaster Lounge, Moulton Union
All other attendees, Main Lounge, Moulton Union*

All will proceed through the buffet line in Main Lounge. If the individual who directs your school's overall Annual Fund program is attending the conference, s/he is asked to attend the Directors Lunch at Lancaster Lounge, Moulton Union. Agenda topics will include an update from the Planning Committee, plans for the Mid-Year Directors' Conference and discussion topics suggested by those in attendance. All other conference participants will attend lunch in Main Lounge.

1:00 – 2:15 p.m.

Breakout Session II
Metrics for Managers

Cassie Ritter Hunt, Director of the Annual Fund, Washington and Lee University
Jim Trapp, Director of Annual Giving, Williams College
Druckenmiller 004

How do you measure and analyze your annual fund's performance, both overall and within specific components? By what metrics can you measure the accomplishments of your staff? How can you use what you learn to position your program, shape your staffing and gauge your goals for short- and long-term success?

Campaign Positioning of the Annual Fund

Angela Johnson, Director of the Annual Fund and Special Gifts, Mount Holyoke College
Kathy Marcello, Director of Annual Giving, Dickinson
Druckenmiller 020

What are some strategies for positioning the Annual Fund during a campaign-internally with your colleagues and externally with your donors? What are the compelling messages for support of the Annual Fund during a campaign? If you are currently in a comprehensive campaign or have just completed one, please come and share your experiences – successes and challenges. For those about to enter a comprehensive campaign, you'll want to hear the valuable insight of those who have gone before you!

The Anatomy of an Ask

Kimberly Hokanson, Director of Alumni and Parent Programs, Bates College
Kanbar Hall 107

Successful in-person solicitation requires solid preparation, conversational skill and responsive follow-through. This session will include discussion of all of these important elements of "making the ask."

Myth-Busting Volunteer Programs

Mary-Jane Cassidy, Assistant Director of Annual Giving, Connecticut College
Jennifer Krouse, Development Officer-Alumni Fund, Williams College
Christine Robare, Development Officer-Alumni Fund, Williams College
Druckenmiller 016

Come share your own volunteer questions or issues as we bust a few volunteer myths, including: "Only the class can elect class officers," "You can't fire a volunteer," and "Volunteers always know best!"

2:15 – 2:30 p.m.

Coffee Break
Druckenmiller Atrium

2:30 – 3:45 p.m.

Breakout Session III
The Gift Club Shake Up!

Carolyn Kimberlin, Director of Annual Giving, Colby College
Deb Wiediger Strecker, Director of Annual Giving, Haverford College
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Are your donors stuck in a gift club rut? Is your \$1,000 donor from 1960 still a \$1,000 donor in 2007? Are you considering revolutionizing your giving societies? Come hear the strategies and struggles of schools that have recently changed and increased their gift club levels. We'll track donor trends, explain the rationale (and process) for these new giving levels, and share how our donors responded to the change.

Athletic Fundraising: What's the Gameplan?

Diane Robbins, Director of Annual Giving, Wheaton College

Thomas Harvey, Manager Athletics Fundraising, Bucknell University

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Thinking about establishing an athletic fundraising program? Hoping to build upon an existing program? Come and share ideas, experiences and questions on topics that include the following: "Out of the Starting Gate"...How do you establish and/or promote the identity of your athletic fundraising program? "Who's on the team" ...Annual giving, athletics (coaches?), alumni programs, an advisory board? ... "Keeping score"...How does athletic fundraising accounting work? Unrestricted or restricted? Budget relief or budget enhancing? "Rules of the Game" ... How do you bring coaches or others who are used to doing their own fundraising on board? "Making Some Noise"...How do you get your message across to your constituency groups about the needs of your athletic programs? "Keeping the Momentum"...How do you keep athletic donors giving every year on a consistent basis?

The Phonathon: Manual vs. Automated

Sarah Gonzalez Bocinski, Assistant Director of the Annual Fund, Colgate University

Stacey Golec, Associate Director of Annual Giving, Dickinson College

Ian Ward, HWS Connect Manager, Hobart & William Smith Colleges

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Thinking about automating your phonathon? This session will discuss in detail the pros and cons of manual and automated phonathon programs from the number of staff hours need to run the program, to technical support needs and tracking results. We will also open up the discussion so attendees can share successful program strategies and ask questions.

5:00 p.m. Leave campus for Portland Harbor Cruise and dinner on Peaks Island
Meet the bus at the Polar Bear statue on Hyde Plaza

10:30 p.m. – midnight Informal gathering and networking on campus
Jack Magee's Pub, David Saul Smith Union

Tuesday, July 17, 2005

8:00 – 9 a.m. Breakfast
Main Lounge, Moulton Union

9:00 – 10:15 a.m. **Breakout Session IV**
Segmenting and Personalizing Your Annual Fund Message
Theresa Rivas, Associate Director of Annual Giving, Claremont McKenna College
Jason McCahan, Assistant Director of the Annual Fund, Bucknell University
Kanbar Hall 107

This session will explore ways to segment your prospect pool for mail and e-mail communications. In addition, we will discuss ways to personalize your communications. Both concepts work hand-in-hand, and today's technology is making it easier.

Annual Fund and Major Gift Offices: What's Different, What's the Same?

Sarah Conlon Curtis, Director of the Annual Fund, Colgate University

John Murphy, Director, Annual Fund Leadership Gifts, Hamilton College

Druckenmiller 004

From a donor-driven perspective, annual leadership donors are also very likely to be major gift prospects. How can annual giving staffs help develop the growing

relationship between donors and the institution that leads to leadership gifts for all college priorities? Leadership annual donors warrant the sort of personal attention from annual giving offices that once came only from major gift offices. How should annual giving offices work with development colleagues – including the alumni office, major gifts, research and stewardship offices – to grow our leadership donor populations?

Young Alumni: The Increasing Importance of Engaging Their Support

Mary Livingston, Associate Director of Annual Giving, Wesleyan University

Erika Klar, Associate Director of Annual Giving, Hamilton College

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We all know that it is critical for the futures of each of our institutions that we engage young alumni early as both donors and volunteers. With an eye toward annual giving, hear about some of our successes and ongoing challenges, and share your own as well. We will focus on average gift size/participation, volunteer and donor stewardship, communications, and collaborating with development colleagues as well as other campus offices.

Pursuing Clarity in an Era of Ethical Ambiguity

Mark W. Jones, Vice President for College Advancement, St. Norbert College

Kanbar Hall 107

An interactive session promising moral guidance and practical advice for maintaining your dignity amidst the abundant joys of the annual fund – declining participation, ever-bigger goals, frequent staff turnover, tighter budgets, class agents who won't make their calls, and donors who want to restrict their gifts. Come prepared to think about and perhaps even reassess your own professional standards. You're also encouraged to bring along a favorite ethical dilemma to share with your classmates!

10:15 - 10:30 a.m.

Coffee Break

Kresge Lobby, Visual Arts Center

10:30 - Noon

Plenary Session II

Participation and Annual Giving: What's Next?

Bob Burdinski, Principal, Robert Burdinski Consulting Group

Kresge Auditorium, Visual Arts Center

Before *U.S. News*, did schools care about participation? Now that we live in a *U.S. News* world, what can we do about it? Should participation be our primary focus? What is the next focus, and how do we continue to have our programs thrive and generate the resources that our institutions are counting on?

Noon

Lunch

Main Lounge, Moulton Union

Noon

Conference Planning Committee Meeting & Luncheon

(Planning Committee members only)

Lancaster Lounge, Moulton Union

1-1:30 p.m.

Dorm check-out

Return keys to Office of Events & Summer Programs, Thorne Hall. If you are leaving the conference before lunch, you can return your key early to the office.