



## **STAFF** Sharing the Alumni Fund Fundamentals

23<sup>rd</sup> Annual Conference  
July 20-22, 2008  
Bowdoin College, Brunswick, Maine

### **Sunday, July 20, 2008**

- 3:00 - 4:30 p.m. Conference Planning Committee Meeting (*Planning Committee members only*)
- 3:00 – 8:30 p.m. Conference Registration
- 5:30 – 6:30 p.m. Opening Reception
- 6:30 p.m. Dinner and Welcome
- 8:00 p.m. **Keynote Speaker: William A. Torrey**  
*Senior Vice President for Planning & Administration and Chief Development Officer,  
Bowdoin College*
- 9 p.m. – midnight Informal gathering and networking on campus

### **Monday, July 21, 2008**

- 7:30 – 8:30 a.m. Breakfast  
*Main Lounge, Moulton Union*
- 8:30 – 9:45 a.m. **Breakout Session I**

#### **I'm New to Development – What Should I Know or Expect in the First Year?**

*Elizabeth Anema, Director of the Annual Fund, Amherst College*  
*Eric Foushee, Executive Director of Alumni Relations and Annual Giving, Bowdoin College*

Session details TBD.

#### **Putting a Face on Your Fundraising Message**

*Sue Regier, Director of Annual Giving, Middlebury College*  
*Jennifer Tougas, Assistant Director of Annual Giving, Trinity College*

Both Middlebury and Trinity have worked hard to collect and share the personal stories of their students and alumni over the past year. Such narratives can reflect the heart and soul of your institution, and compel alumni, parents, and friends to make gifts to your Fund. They are also a wonderful reminder of why we do what we do! Come learn the nuts and bolts of this type of program as well as hearing the results of their efforts.

#### **I Can't Thank You Enough: The Importance of Good Stewardship**

*Chris Robare, Development Officer, Williams College*

The best prospects for future gifts are current donors. So why is stewardship often just an afterthought instead of an integral part of the plan? We'll discuss ongoing

stewardship as a means of increasing donor satisfaction and connectivity, and look at the elements of a thoughtful stewardship plan that serves donors across the gift pyramid. We'll consider why bad stewardship is even worse than no stewardship at all, and review the impact of both on issues ranging from multi-year pledges, donor renewal, gift promotion, and future major gift/planned giving commitments. Lastly, we'll highlight potential strategies you can use to help rebuild troubled donor relationships.

### **Leadership Giving**

*Erin Martinovich – Director of the Annual Fund, Skidmore College*

*Colleen Boyce – Associate Director, Alumni and Parent Programs, St. Lawrence University*

A moderated discussion on hot topics in annual fund leadership giving that will be helpful to veterans and new staff alike. Come with your questions and institutional best practices. Discussion topics may include Wall Street's effect on your bottom line, relationships with capital or leadership gift officers, keeping your top donors satisfied within the Annual Fund, multi-year solicitation plans, how to include young alumni leadership donors in your program, communicating with leadership donors, managing leadership volunteers, raising gift club levels, incentives for leadership giving in the annual fund – and any topics you bring!

9:45 - 10:00 a.m.

Coffee Break

10:00 – 11:30

### **Plenary Session I**

#### **Lessons Learned: Annual Fund Truths and Myths**

*Mike Westfall, Vice President for University Advancement, Eastern Washington University*

Experience is truly the best teacher. Valuable lessons learned through working/consulting for large, small, public, private and international institutions will be shared.

11:30 -1:00 p.m.

Informal Lunches/Working Lunch

1:00 – 2:15 p.m.

### **Breakout Session II**

#### **Reunion Giving: How Your Annual Fund Can Benefit From Milestone Celebrations**

*Stefanie Morrison, Associate Director of the Alumni Annual Fund, Carleton*  
*Jessica Cohen, Associate Director, Washington and Lee*

Now that you have your volunteers recruited, how can you engage them? Explore different timelines, training opportunities, and learn about creative messaging to your alumni. We'll also discuss how we count our reunion giving totals. Do you only count the reunion year? Do you allow your donors to pledge out three, four, five years? How can you raise the largest reunion gift every year?

### **Young Alumni**

*Jeff Stauch, Assistant Director, Annual Giving, Middlebury College*

*David Steadman, Associate Director, Annual Giving, and Director, Young Alumni Giving, Hamilton*

Your graduates received a first-class education, participated in their senior gift campaign and are perfectly positioned to start their lives in the “real world.” Once they

land, however, annual giving isn't at the top of their to-do list. This begs the question: How do you keep most recently graduated alumni engaged and interested in giving back? Dave and Jeff will discuss their personal experiences with four strategies to spur young alumni engagement: unique challenges, electronic resources, volunteer recruitment and retention and sustainable "green" solicitations.

### **Gift Clubs**

*Kathy Marcello, Director of Annual Giving, Dickinson College*

*Angela Johnson, Director of the Annual Fund and Special Gifts, Mt. Holyoke College*

Is your institution thinking about changing its gift club levels? Adding more club levels? Changing the entry level of your leadership giving society? Come to this session and talk to those who have been through the process. We'll discuss marketing plans for implementing changes, what worked and what didn't, what we might have done differently now that we've been through the process, and what our results look like after one year of implementation.

### **From the Ask to the Yes: Strategies for Closing the Deal**

*Ellen Anderson, Director of Annual Giving Programs, Connecticut College*

*Catherine Okereke, Assistant Director of Annual Giving, Pomona College*

You've made "the ask." Now what? This is a crucial part of your job as the answer a donor gives is rarely a clear "yes" or "no." We will be discussing how to follow through with your ask, including strategies for clarifying the donor's response, negotiation, and establishing appropriate follow up before you walk away from the meeting.

2:15 – 2:30 p.m.

Coffee Break

2:30 – 3:45 p.m.

### **Breakout Session III**

#### **Capital Campaign and Credibility**

*Mike Westfall, Vice President for University Advancement, Eastern Washington University*

With so many schools in campaign mode, what role should the annual fund play in your capital campaign? Varied campaign strategies will be reviewed as well ways to enhance the credibility of the annual fund with your internal audiences.

#### **We've Got These Reports. Now What? Using Data Analysis in Annual Giving**

*Chris Clark, Executive Director for the Alumni Annual Fund and Parent Funds, Carleton College*

What are the important numbers to follow in annual giving? Does any of it matter when the bottom line is all that anyone is watching? When you have in-depth reports at your disposal, what then? Take a look at the common evaluation tools used in annual giving and consider which metrics really matter for your program.

#### **On-line Volunteer Resources**

*Lisa Shah, Associate Director, Annual Giving, Wellesley College*

*Emily Bray Levine, Senior Associate Director of Annual Giving, Bowdoin College*

As you train your fund volunteers and equip them to make successful solicitations, where does the Internet fit in? What types of on-line resources can motivate and support your volunteers? We'll look at some steps to consider when developing and launching on-line tools, and we'll spend some time reviewing sample sites. Bring your questions, but be ready to share in a broader discussion of the benefits and challenges of using the Internet to share data and training materials with your volunteers.

### **Calling All Prospects: Managing Your Phone Program**

*Angie Myers, Annual Fund Manager, Bucknell University*  
*Rob Herrick, Assistant Director, Carleton College*

Running a phone program requires a very diverse set of skills. You're called upon to segment your prospects, set fundraising goals, analyze your progress and adjust plans accordingly, recruit and train callers, keep employee morale high, wrestle with technology, practice outstanding customer relations, and manage lots and lots of data. This session will give you tips for getting it all done while raising some money, too!

5:00 p.m.

Leave campus for Portland Sea Dogs game  
(We'll be sitting in a special pavilion area and eat dinner at the ballpark.)

## **Tuesday, July 22, 2008**

8:00 – 9 a.m.

Breakfast

### **Breakfast Roundtable**

*I'm New to Development, Part 2*

Join us for an open forum to discuss and ask questions about topics that were covered during the conference. Walk away with reference materials and other tools to help further your career in the Annual Fund.

9:00 – 10:15 a.m.

### **Breakout Session IV**

#### **Prospect Management**

*Greg Bader, Director of the Annual Fund, Denison*  
*Carolyn Kimberlin, Director of Annual Giving, Colby College*

Leadership donors are critical to any annual giving program. You have been assigned dozens and dozens of suspects, prospects, and donors. Your success will depend on your ability to manage each through the process of discovery, cultivation, solicitation, and stewardship. When and whom do you bring in to the management process? What role will volunteers play, and how might you best grab the attention of major gift colleagues? Organized efforts can return significant results and make your career even more rewarding.

#### **Snail Mail and E-Mail**

*Barbara Knauf, Senior Assistant Director, Alumni and Parent Programs, St. Lawrence University*  
*Jason McCahon, Associate Director of Annual Giving, Bucknell University*

It's July, and you need to return from this conference with some new ideas to compliment your mail and e-mail calendar. Join us for tips, strategies and a discussion of what works (and doesn't work) in Annual Fund mailings. Explore different strategies with direct mail and how to develop a year-long appeal plan as well as the pros and cons to offering designations within the annual fund.

### **Reaching your Parents Fund Potential**

*Jessica Kansas, Annual Funds and Special Gifts Officer, Mount Holyoke College  
Anne Higby, Director of Parent Giving, Kenyon College*

Join us and discover how to recruit, engage, and motivate current and past parents as volunteers and solicitors. Tap into a whole new resource and increase the size of your Annual Fund effortlessly. This session is designed for small shops that are part of larger, more established organizations.

### **Student Philanthropy**

*Susan Sheehan, Director of Reunion and Class Giving, Vassar College  
Danika Vittoria, Assistant Director, Young Alumni Programming & Philanthropy, Skidmore College*

Teaching principles of philanthropy to students. Candid discussion will focus on class giving programs and education, successes and failures.

10:15 - 10:30 a.m.

Coffee Break

10:30 - Noon

### **Plenary Session II: Engaging Diverse Populations in Annual Giving**

*Melissa Hanna, Senior Director for Annual and Special Giving, Iowa State University Foundation*

As Annual Fund programs grow in size and scope, they must begin to step away from some closely held notions about how to engage alumni and uncover methods to attract individuals who have not historically been consistent donors. The key is getting away from traditional segmentation based on grad year and donor history and approaching alumni based on their own personal interests. This session will focus on strategies that will work to engage our diverse alumni populations with an eye toward developing a new pool of loyal donors. We will discuss everything from finding the correct solicitation method, to crafting the perfect message, to properly stewarding donors in order to ensure long-term involvement.

Noon

Lunch

Noon

Conference Planning Committee Meeting & Luncheon  
*(Planning Committee members only)*