



ADRDP Midwest Regional Forum

Presentation Program

8:00 – 8:30 AM	Breakfast & Registration
8:30 – 9:15 AM	Opening/Welcome Keynote: Don't Treat Your Donors Like Crayons, Adam Clevenger, CFRE
9:30 – 10:15 AM	Breakout Session 1A: Guess What? We're Planning Another Campaign! Breakout Session 1B: #GivingTuesday Planning & Stewardship Breakout Session 1C: What's the Big Deal About Data?
10:30 – 11:15 AM	Authentic Stewardship at the Principal and Major Gift Level
11:30 AM – 12:45 PM	Lunch Presentation: Stewardship as Cultivation
1:00 – 1:45 PM	Breakout Session 2A: Using Prospect Research Techniques to Create Meaningful Donor Experiences Breakout Session 2B: Thinking Outside of the (Crayon) Box: Creative and Inexpensive Ways to Thank and Retain Your Annual Giving Donors
2:00 – 2:45 PM	General Session II: A Practical Tool for Stewardship Top Donors
2:45 – 3:00 PM	Closing Remarks

Keynote Presentation: Don't Treat Your Donors Like Crayons

Adam Clevenger, CFRE

Director of Development, Indiana Repertory Theater

Volunteers and donors are feeling overworked, unappreciated, and underutilized leaving them to feel, well, empty. But, we didn't mean to, right?

With all that goes on in our nonprofits, stewardship sometimes gets overlooked. It's not intentional, but it happens. And donor retention rates show it. According to the latest Fundraising Effectiveness project, only 19% of first-time donors stick around to give again the second year. And we lose 103 donors for every 100 we gain. No wonder it feels like we can't catch up. There is a solution: stewardship. Based on the [Bloomerang's most popular post of 2015](#), the upcoming session, learn to:

- Spot donor and volunteer fatigue
- Ask questions to better understand donor and volunteer satisfaction
- Use easy tips to increase donor passion and reduce attrition.



Adam Clevenger, a Certified Fundraising Executive (CFRE), has spent his entire career building donor passion for causes. Currently, Adam is the Director of Development for the Indiana Repertory Theatre (IRT), the state's largest professional and only regional theatre. In the position, Adam leads a development team serving 109,000 students and patrons, engaging 2,200 annual donors, securing \$2.5 million annually and launching a capital campaign. Before joining the IRT, Adam served as Regional Collaboration Manager for the YMCA of the USA, working closely with 300 local Ys to support their development efforts; Director of Annual Giving for the YMCA of Greater Indianapolis providing leadership to the annual campaign for 13 branches that raised more than \$2 million each year. Additionally,

he is a YMCA Faculty Trainer for the Annual Campaign and Introduction to Fundraising courses, a frequent contributor to Bloomerang and the North American YMCA Development Organization (NAYDO) blogs, and conference presenter. As a volunteer, Adam serves as a board member and former VP of Resource Development for Indiana Chapter of Association for Fundraising Professionals (AFP), both the Advisory Council and Development Committee for Second Helpings in Indianapolis, Stewardship Committee for Second Presbyterian Church, a board member for Indiana YMCA Youth and Government and Hanover College Business Scholars Program Leadership Council. Adam and his wife, Jess, enjoy traveling, gardening and spending time with their daughter and two energetic dogs. Follow him on Twitter, @adamclevenger.

AM Breakout Presentations

Session 1A: Guess What? We're Planning Another Campaign!

James Allan, Director of Planned Giving, Stewardship and Special Gifts, Art Institute of Chicago

It's time for your institution to gear up for another campaign, but several others with the same plan in mind surround you. Not to mention, many of your top donors are still recovering from your last campaign. Beyond that, donors are becoming increasingly selective about where and how they focus their philanthropic commitments. With these realities, institutions must prove that their campaigns meet the greatest needs of the communities they serve. This session will provide practical tips for effectively stewarding donors before, during, and after the campaign that will have you stand out from the crowd.

James Allan is the Art Institute of Chicago's Director of Planned Giving, Stewardship, and Special Gifts. James has been with the Art Institute for 18 years in positions of increasing responsibility with the Art Institute's museum, School, and Gene Siskel Film Center. Immediately prior to his current role in major and planned gifts, James was Director of Major Gifts for the museum's Building of the Century campaign. This fundraising effort raised more than \$412 million for the design, construction, and endowment of the Modern Wing and related capital projects. James has a BSFS from Georgetown University. In addition to his work at the Art Institute, he is a docent with the Chicago Architecture Foundation.

Session 1B: #GivingTuesday Planning & Stewardship

Vicki Rubio, Development and Communications Manager, College Mentors for Kids
Erin Cosler, Director of Operations, College Mentors for Kids

Special days of giving have become increasingly popular in fundraising, and #GivingTuesday is the most prevalent of them all. How can you make your organization stand out to your donors on giving days? Through careful planning and the mobilization of volunteers, College Mentors for Kids was able to more than double the funds raised on #GivingTuesday from 2014 to 2015. In this session, learn strategies for making your giving day successful and ideas for making the experience fun for your donors and supporters.



Vicki Rubio is the Development and Communications Manager for College Mentors for Kids. She joined the organization in 2013 after spending a year as an AmeriCorps Public Ally in Indianapolis. Vicki graduated from Butler University with a degree in Political Science and minors in Gender Studies and Peace Studies. Vicki enjoys creating meaningful ways to thank donors and connect them to the mission of College Mentors for Kids.



Erin Cosler is the Director of Operations for College Mentors for Kids. She graduated from Butler University with a dual degree in International Management and International Studies, as well as a minor in Spanish. Passionate about youth and education, Erin joined College Mentors for Kids in 2011, first serving as an Associate Director for Programming supporting college student volunteers in implementing the mentor program on their campus.

Breakout Session 1C: What's the Big Deal About Data?

Andrew Means, Co-Founder of The Impact Lab

Join Andrew Means, co-founder of The Impact Lab, as he talks about how data is changing the way nonprofits work, raise money, and impact the world. In this session Andrew will discuss what data even is, some of the important concepts and technologies underlying data science, and provide examples of how organizations big and small are getting the most they can out of their data. This session is accessible for data newbies and there will be lots of discussion to connect the subject matter to your own work.



Andrew Means is Co-Founder of The Impact Lab, a data science shop that works with nonprofits, foundations, and government agencies solving social problems. He has previously held leadership positions at The University of Chicago's Center for Data Science & Public Policy, Groupon, and the YMCA of Metropolitan Chicago. He holds a Master in Public Policy from the Harris School at the University of Chicago and is trained in Six Sigma from Motorola. Andrew is a member of the Board of Directors at Ingenuity Inc.

General Session I: Authentic Stewardship at the Principal and Major Gift Level

Yvette Grooms, Director of Stewardship, Rush University Medical Center

Our principal and major gift donors invest in our organizations in a variety of ways and for multiple reasons. Therefore, it's important to understand their motivation and steward their support appropriately. During this session, we'll unpack stewardship strategies to connect with principal and major gift donors on a deeper level.



Yvette Grooms is the Director of Stewardship in the Office of Philanthropy at Rush University Medical Center in Chicago. In her role, Yvette oversees an institution-wide comprehensive stewardship system that appropriately and consistently promotes recognition of donors at all levels. Yvette has more than 15 years of fundraising experience developing and implementing comprehensive, integrated stewardship programs that include donor communications, donor recognition, fund reporting, special events, and thank you call programs. Before joining Rush, Yvette worked for five years in the Constituent Relations Division at the National Office of the Alzheimer's Association developing and implementing stewardship strategies across the chapter network nationwide. Yvette holds a Bachelors of Arts from Governor's State University.

Lunch Presentation: Stewardship as Cultivation

Tom Wick, Senior Vice President of Mission Advancement, YMCA of Metro Chicago

The goals of this presentation include:

- Demonstrate that stewardship shouldn't be viewed as a "got to" component of a fundraising program.
- Identify strategies to more effectively integrate stewardship into a development program to drive "sustainable philanthropy" from an increased number of donors.

To pursue these goals, I'm planning to address the following questions:

- How has stewardship been defined and executed?
- Why is stewardship not a core component of development programs?
- What prompted my view of stewardship to change?
- What role(s) do we need stewardship to fulfill to ensure ongoing successful fundraising efforts?
- What specific strategies must we implement to enable stewardship to fulfill this role?
- How to engage organization leadership to invest in stewardship?



Tom Wick joined the YMCA of Metro Chicago as Senior Vice President, Mission Advancement in November 2015. In this key role, Tom serves as the senior development executive and external advocate for the YMCA of Metro Chicago. Throughout his career, Tom has demonstrated his expertise and strong ability to identify, evaluate, cultivate and solicit meaningful philanthropic commitments to support nonprofit, mission-driven organizations. Tom takes particular pride in mentoring and developing staff and has a deep connection to the Y's service to children, families and communities. Tom comes to the Y from the University of Chicago Urban Labs and Urban Education Institute where he served as Chief Advancement Officer with the responsibility for leading the fundraising efforts for both organizations. Tom built an advancement program that produced outstanding results by working in partnership with University leaders, trustees and major donors. Tom holds

a Bachelor of Arts in Government from Lawrence University and a Master of Science degree from Northwestern University. He lives in Flossmoor, Illinois, with his wife Susan and two sons.

PM Breakout Presentations

Session 2A: Using Prospect Research Techniques to Create Meaningful Donor Experiences

Bond T. Lammey, Senior Associate, Bentz Whaley Flessner

It takes a village to steward a donor. You know many of the key players – your team, the development officer, senior leadership at your organization, gift processing. In spite of all of these touchpoints, we sometimes miss opportunities to connect with our donors in meaningful ways. There's a wealth of information on your donors that exists external to your organization that your colleagues in prospect research review daily. This session will review some of the main research resources and techniques utilized by prospect researchers to learn more about our donors' philanthropic giving behaviors, business interests, and other relevant personal information that may aid us in deepening our connections with major and principal gift donors.



Bond Lamme is a senior associate at Bentz Whaley Flessner specializing in prospect development. She has worked with higher education institutions, medical centers, humanitarian and conservation organizations. Prior to joining BWF, Lamme led prospect research efforts at the University of Chicago, where she oversaw the central prospect research team and developed integrated strategies with prospect management, analytics, corporate and foundation relations research. Lamme received her bachelor's degree in sociology and her master's degree in nonprofit administration, both from North Park University in Chicago, Illinois. She is on the board of APRA International and has presented in the United States, Canada, and Asia at CASE, SunGard, ADRP, AASP, and APRA conferences. Additionally, for the past two years, she has been on the faculty of the CASE Development Researchers conference and as an instructor for Rice University's

online Constituent Relationship Management course.

Session 2B: Thinking Outside of the (Crayon) Box: Creative and Inexpensive Ways to Thank and Retain Your Annual Giving Donors

Joanne Riester, Director, Donor Relations, Ann & Robert H. Lurie Children's Hospital of Chicago Foundation

In the age of ever-present campaigns and ever increasing fundraising goals, it can be all too easy to focus our attention on our major and principal gift donors. But, to be successful in the short and long term, we must remember that our annual giving donors are the backbone of our organizations, building the pipeline for our transformational gifts of tomorrow. How are annual giving donors stewarded at your organization? This presentation will provide several creative and inexpensive strategies that your donor relations team can tailor to thank and retain your annual giving donors, year after year.



An innovative donor relations leader with more than nine years' experience in healthcare and higher education fundraising, **Joanna Riester** began her career in donor relations at Northwestern University Feinberg School of Medicine as Assistant Director, Donor Relations. She was promoted to Associate Director in 2009. In addition to building a systemized endowed fund and stewardship reporting program at Feinberg she was instrumental in launching the school's online giving pages and social community, *Our Northwestern*. In 2012, Joanna was promoted to Senior Associate Director, Engagement & Participation, a role in which she lead the medical school's annual giving program for alumni, grateful patients, employees and faculty. In 2015, she returned to donor relations as the Director, Donor Relations at Ann & Robert H. Lurie Children's Hospital of Chicago. At Lurie Children's, Joanna oversees a comprehensive donor relations program. With her team, she develops and implements cultivation, acknowledgement, recognition and stewardship strategies for annual, major and principal gift donors, as well as event donors and partners within our Affiliated Organizations.

General Session II: A Practical Toolkit for Stewarding Top Donors

Rebekah Nowak, Senior Associate Director, Donor Relations, Northwestern University

Your organization's top donors are very important! In this session, gain valuable insight into a university's top donor stewardship program and learn how its strategies and tools can help any size shop maximize relationships with its most generous donors. We will discuss individual stewardship plans, using a donor audit, and practical next step reports to help provide meaningful and worthwhile experiences. Examples and tips will be presented along with useful steps that can be implemented in any organization.



Rebekah Nowak is the senior associate director of donor relations at Northwestern University. She has been in this role for three years and has previously worked on the reunions team as well as for the McCormick School for Engineering and Applied Science. In her role, she stewards donors to the University who have cumulative giving of \$5M+. Previous development experience comes from her time at the Newberry Library and Chicago Botanic Garden. Rebekah received her undergraduate degree from St. Olaf College and a master's degree in public service management from DePaul University.