

SIXTH ANNUAL ADRP NEW YORK CITY REGIONAL CONFERENCE

Friday, March 11, 2016

9:00am – 4:00pm

Museum of Jewish Heritage

Edmond J. Safra Plaza, 36 Battery Place, New York, NY

Presented by the Association of Donor Relations Professionals

PROGRAM

Registration and coffee **9:00am – 9:30am**

Welcome and Keynote **9:30am - 10:45am**

The Purposeful Strategic Influence of Donor Relations on Philanthropy Today

Dexter Bailey, Senior Vice President for University Advancement at Stony Brook University and Executive Director, Stony Brook Foundation

Session 1 **10:55am - 11:55 am**

Session 1A: Making Your Data Sing: Creating a Personalized Endowment Report Suite

Session 1B: Help Them Help You: How to Effectively Partner with and Manage your Volunteers and Board Members

Session 1C: Capturing the Lifecycle of Named Giving Opportunities: A Historical Perspective for Relationship Management

LUNCH BREAK – Exhibit Hall

Session 2 **1:00pm - 2:00pm**

Session 2A: Friends for Life: Stewarding Planned Gift Donors #Friends4LifePG

Session 2B: Innovative Twists on Traditional Recognitions

Session 2C: Shake What You've Got – Celebrating and Recognizing Your Donors on a Limited (or Non-Existent) Budget

Session 3 **2:10pm - 3:10pm**

Session 3A: Engaging Students in the Donor Relations Process and Philanthropy

Session 3B: Metrics, ROI, and Improving the Bottom Line: A How-To Guide to Demonstrating the Impact of Donor Relations

Session 3C: Spring Cleaning Your Donor Relations Program

Networking Ice Cream Social **3:10pm - 4:00pm**

Join us for a fun and informal networking event to wrap-up a day of great sessions!

SESSION DESCRIPTIONS AND SPEAKER BIOS

REGISTRATION AND COFFEE

9:00am – 9:30am

WELCOME AND KEYNOTE

9:30am – 10:45am

The Purposeful Strategic Influence of Donor Relations on Philanthropy Today

Dexter Bailey, Senior Vice President for University Advancement at Stony Brook University and Executive Director, Stony Brook Foundation

This discussion will explore the vital growing role of donor relations professionals within the ever-complex world of philanthropy. As institutions struggle to compete to retain donors and struggle to engage new philanthropists, donor relations professionals are on the front lines developing meaningful opportunities for donors to engage. Moreover, as fundraisers, presidents, and senior academic leaders transitioning jobs with more and more frequency, donor relations professionals are taking on the role of long-term institutional stewards, promise keepers, and in many cases, they are the strongest point of contact for donors. Advancement leaders who want to succeed need to prioritize donor relations and bring them out from the back office to the front lines.

Dexter Bailey is Senior Vice President for University Advancement at Stony Brook University and Executive Director of the Stony Brook Foundation. Founded in 1957, the University located on Long Island in New York offers more than 24,000 students an uncommon education with an exceptional return on investment. Stony Brook is a member of the prestigious Association of American Universities and US News & World Report ranks Stony Brook #37 among the nation's public research universities.

Over his 20 year career, Dexter has been directly responsible for gifts and pledges totaling more than \$700 million. Since joining Stony Brook in 2011, Dexter has led the Advancement team to record-breaking fundraising results, highlighted by a \$150 million lead gift for the University's recently-launched \$600 million comprehensive campaign. Both the gift and the campaign are the largest in the State University of New York (SUNY) system's history. Before joining Stony Brook, Dexter executed a \$200 million comprehensive campaign at WPI where he was vice president for advancement. Prior to WPI, Dexter was the executive associate director for external relations for intercollegiate athletics at the University of California, Berkeley, where he directed the effort to raise \$150 million in gifts and pledges – the most successful fundraising performance at the University during that time. Dexter earned a BS in Journalism from the EW Scripps School of Journalism at Ohio University and an MBA from the University of Toledo.

SESSION 1

10:55am - 11:55am

1A: Making Your Data Sing: Creating a Personalized Endowment Report Suite

Melody McBeth, Principal/Senior Consultant, Highland Fundraising Solutions, LLC

Are you being asked to create an endowment reporting system but, despite the webinars and sessions, still don't know where to start? Perhaps your institution even has the on-staff data geek(s) but they just don't "get" your explanation. Come learn an easy-to-remember and even easier-to-explain method for creating a custom endowment report suite. Making it as easy as Do-Re-Mi.

Melody Allen McBeth has 20 years of development and fundraising experience as a solicitor, volunteer manager, event coordinator, database administrator, and reporting architect in health care, arts, independent and higher-ed institutions. She has also served many institutions as interim management while she assisted with their talent search. She owns Highland Fundraising Solutions where she and her staff help clients with training, custom reporting, organization restructuring, process refinement, and data audits. Before entering the development field, Melody was a "Jane-of-many-trades" and feels her cross industry experience is vital to formulating highly successful solutions to sticky data challenges. Melody is also the current AASP Program Committee Chair and author of the "United States Uniformed Services Guide to Ranks."

1B: Help Them Help You: How to Effectively Partner with and Manage your Volunteers and Board Members

Jennifer Richwine, Executive Director, Washington Office, Wake Forest University

Volunteers and board members should be our most engaged constituents, but often we take them for granted and forget that we should steward them as carefully and as creatively as a prospective donor. Learn how to use every moment with volunteers and board members as a stewardship opportunity, providing meaningful experiences that keep them actively engaged in your organization. Explore ways to ensure that your volunteers are telling your story and spreading the vision for your organization.

Jennifer Richwine has more than 19 years of experience in special events and higher education. In 2014 she was named Wake Forest University's first Executive Director of the Washington, D.C. Office. Prior to this new role, she was Assistant Vice President for University Events at Wake Forest, where she was responsible for the overall strategy, production, and execution of signature events for the university. Her experience covers a wide range of events, from intimate donor dinners at the president's house, to large-scale events including inaugurations, national presidential debates, campaign kickoffs, film screenings, tapings of NPR's "Wait, Wait Don't Tell Me," and ESPN's Homecoming Show with Rick Reilly, as well as 12 years of commencements with national and international dignitaries. While head of the events team at Wake Forest, Jennifer's interest and focus were on event strategy, success metrics before and after an event, and execution of events without reinventing the wheel. She and her staff regularly partnered with development, stewardship and donor relations, and principal gifts staff to customize events and visits to campus, creating an experience designed to engage constituents in a more meaningful way with the university and its mission. Jennifer's passion for expressions of gratitude in any workplace environment led her to author a book entitled "With Gratitude: The Power of a Thank You Note," which was named the number one new release in business

etiquette. Jennifer is a Phi Beta Kappa alumna of Wake Forest University with a bachelor's degree in English.

1C: Capturing the Lifecycle of Named Giving Opportunities: A Historical Perspective for Relationship Management

Kelly Brennan, Associate Director, Donor Relations, Memorial Sloan Kettering Cancer Center

The only thing constant is change. This is certainly true for Named Giving Opportunities (NGO). Is your database structured to capture the lifecycle of the NGO? Has your organization had to relocate NGOs due to construction or other circumstances? Are NGOs recorded in your database under individual donor/organization accounts, as opposed to as NGO specific accounts?

If yes, this presentation aims to address how to structure the lifecycle of NGOs in your database. As a healthcare, research, and educational organization, Memorial Sloan Kettering Cancer Center has multiple buildings with a facilities plan that is constantly evolving and addressing new and expanding specialties and building needs. There is a need to preserve the history/stages of NGOs as they move from location to location from the perspective of relationship management.

This session format will combine presentation with a guided dialogue on best practices. A secondary goal is to create a network of professionals responsible for Naming Opportunities.

Kelly Brennan has been working in educational philanthropy for more than 20 years. She has worked for Adelphi University, Columbia University, the Fire Department of New York, New York University, and the New York City Fire Museum. Currently, she works in Development for Memorial Sloan Kettering Cancer Center where she is responsible for Alumni Relations, Donor Relations and Services, Gifts-in-Kind, Named Giving, and Patient Referrals. She also teaches part-time in the Higher Education Administration Masters Program for SUNY Stony Brook. Kelly is an active volunteer serving as a mentor with Women in Development and was previously a board member for the Council for Advancement and Support of Education's District II, where she served as the Co-Chair of the 2015 conference. Currently, she is a Board of Director for the Iona College Alumni Association, her alma mater. Kelly has a certificate in Fundraising Management from NYU and a doctorate in Executive Leadership from St. John Fisher's College.

LUNCH BREAK

12:00pm - 1:00pm

SESSION 2

1:00pm - 2:00pm

2A: Friends for Life: Stewarding Planned Gift Donors #Friends4LifePG

Lisa Chmiola, Director of Major Gifts & Planned Giving, St. Agnes Academy

Most fundraising operates on a continuous cycle: discovery, cultivation, solicitation, stewardship – morphing back into cultivation for the next gift. But what happens when you secure a gift that requires decades of stewardship just to maintain it? Planned gifts provide the ultimate opportunity for a donor to leave his or her mark on an organization, and if not stewarded properly over generations of fundraisers, can be reduced or even lost completely.

This session gives attendees an opportunity to learn how best to steward planned gift donors, with an emphasis on the fact that the professional securing the gift likely will not be the professional on staff when the donor's gift is realized. Stewardship tactics (including the importance of record keeping) will be discussed, and participants will have time to work through case studies involving tricky planned gifts.

Lisa M. Chmiola, CFRE is Director of Major Gifts and Planned Giving at St. Agnes Academy, a Catholic college preparatory girls' school in Houston, Texas. She is responsible for transformational fundraising, particularly related to capital campaigns and the 1906 Society for legacy donors. Previously she served as Director of Advancement for the University of Houston College of Technology, overseeing fundraising, alumni relations, marketing and communications efforts. She has presented nationally and internationally on fundraising and social media. She is a certified AFP Master Trainer and an official member of the AFPeeps, a flock of volunteers dedicated to spreading the word about AFP International on social media. She serves on the task force which coordinates the annual National Philanthropy Day Honors event and on the Planned Giving Council of Houston board as president-elect. Lisa's 14 years of experience also includes fundraising for the American Heart Association and the City of Lake Charles, Louisiana. She earned a bachelor's in journalism at UH and a master's in public relations from the University of Louisiana at Lafayette. Lisa is a sustaining member of the Junior League of Houston and a graduate of Leadership Houston's Class XXIX and the Center for Houston's Future LeadershipNEXT.

2B: Innovative Twists on Traditional Recognitions

*Dan Blakemore, Assistant Director of Development for Individual Giving, International House
Roberta O'Hara, Senior Director of Donor Relations, Rutgers University Foundation
Lynne Wester, Donor Relations Guru*

Donor walls. Honor rolls. Recognition societies. And more. Each of us has these at our organizations or has encountered them in our professional careers. Standard fare, correct? There's a formula for who is etched in stone, or who is invited to join, or who appears in print, and it rarely varies. Ever ask yourself "why?" What is stopping us from injecting new life into those practices and breaking the traditional molds that have been used by our institutions for years, sometimes (gulp) decades? The answer is that with the technology we have at our fingertips today and the creativity we all possess as donor relations professionals, nothing should be a barricade to innovation and reinvention. Don't limit yourself or your organization. Think creatively about those tried and true recognitions. In this session you'll see fresh approaches to recognizing your loyal donors that will hopefully inspire you to refresh your own standard practices.

Join Dan Blakemore, Roberta O'Hara, and Lynne Wester as they discuss the Reverse Honor Roll, Brandless "honor societies," and other twists on traditional recognitions. Be prepared to share your own recognition twists when they open the floor to the audience!

Dan Blakemore is Assistant Director of Development, Individual Giving at International House in New York City, where he has responsibility for the annual fund, major gifts and legacy gifts portfolios. A Certified Fundraising Executive, he has previously worked at Third Street Music School Settlement, New York University, The Clinton Foundation, and The Jewish Museum. Dan currently sits on the Young Nonprofit Professionals Network National Board, having served as Board Vice Chair and Development Committee Chair during his tenure, and actively volunteers with the Association of Fundraising Professionals (AFP) and the Association of Donor Relations Professionals (ADRP). In the last few years, Dan has presented at the ADRP New York City Regional Conference, the AFP International Conference, the Changing the Face of Philanthropy Summit, and The Foundation Center. He blogs about non-profit fundraising, board governance, and management issues at danblakemore.org and can be followed on Twitter @dan_blakemore.

Roberta O'Hara is the Senior Director of Donor Relations at Rutgers University, where she oversees a team of 15 stewardship, recognition, events, and acknowledgment professionals. Prior to joining Rutgers in 2014, Roberta was the Senior Associate Director of Stewardship at Princeton University. As a volunteer, Roberta's roles have been many. In the 90s Roberta was a founding member of the New England Stewardship Conference, a fledgling group of twelve individuals from the East Coast who recognized the importance of sharing best practices in the nascent field of stewardship and donor relations. This group ultimately became the Association of Donor Relations Professionals (ADRP) in 2004. For ADRP Roberta served as the inaugural Treasurer for two terms, and most recently as the content chair for the 2014 International Conference and the conference chair for the 2015 International Conference in Memphis. Roberta holds a BA in psychology and English from Rutgers University, where she graduated Phi Beta Kappa and rowed on Women's Crew, and an MA in English Literature from Northeastern University.

Lynne Wester is a frequent conference speaker and well known resource for donor relations and fundraising expertise. She has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy and other industry publications. Lynne created www.donorrelationsguru.com to share her expertise, opinions, and collections of samples on a variety of topics with the greater development world and hosts a monthly webinar series. Using her expertise and hands-on approach, Lynne works with organizations to help them keep their focus donor driven, technology savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan, and holds a master's in strategic fundraising and philanthropy and is the author of two books on fundraising, "The Four Pillars of Donor Relations" and "T-Rexes vs Kangaroos and Other Stories: Improving Your Fundraising and Donor Relations."

2C: Shake What You've Got – Celebrating and Recognizing Your Donors on a Limited (or Non-Existent) Budget

Kathleen Diemer, Executive Director of Donor Relations and Advancement Communications, George Mason University

Jenn Robinson, Director of Advancement Programs, George Mason University

Celebrating and recognizing your donors doesn't have to be expensive. In fact, many times it doesn't have to cost anything at all. Showcasing and utilizing the best of what you already have can make all the difference. But how do you find and use all that your institution has to offer? How do you create an amazing campaign kick-off, a meaningful donor recognition event or memorable communication on an extremely tight or sometimes non-existent budget? Jenn Robinson and Kathleen Diemer of George Mason University will share their secrets for collaborating with colleagues to make donors feel like a million bucks, while keeping costs contained.

Kathleen Diemer has more than 15 years of donor relations and communications experience. She currently serves as Executive Director of Donor Relations and Advancement Communications at George Mason University. Prior to joining Mason she served as the Director of Donor Relations at the University of Maryland. In the past she has presented at annual conferences for Academic Impressions, the Association of Donor Relations Professionals (ADRP), the Association of Fundraising Professionals (AFP), Council for Advancement and Support of Education (CASE), National Capital Gift Planning Council and SunGard Higher Education. In September 2007 she was honored with the University of Maryland University Relations Achievement Award, which recognizes extraordinary service to the division. She is also the recipient of a CASE Faculty Star Award (2005), a CASE Silver Circle of Excellence Award (2005) and two CASE Stellar Speaker Awards (2011 and 2012). Kathleen is a Certified Fund Raising Executive who holds a B.A. in Journalism from the University of Maryland and a certificate in Leadership Development. She has been an active member of ADRP since January 2007 and currently serves as ADRP's President-Elect.

Jenn Robinson joined the Advancement team at George Mason University in July 2010 as the Campaign Programs Assistant. Since then, she has served as the Assistant Director of Donor Relations, the Associate Director of Special Events and currently serves as the Director of Advancement Programs, a role in which she oversees donor stewardship and cultivation events as well as volunteer leadership engagement, stewardship and programming. Prior to her work at George Mason, Jenn was the Community Relations Coordinator for her state senator where she was responsible for fundraising and stewardship events, as well as outreach to, and stewardship of, donors and volunteers. She has also worked in the fields of telecommunications law and credit card banking. Jenn is a graduate of the George Mason University School of Law, and holds a B.A. in Psychology and Spanish from the University of Delaware, as well as a paralegal certificate from Georgetown University.

SESSION 3

2:10pm - 3:10pm

3A: Engaging Students in the Donor Relations Process and Philanthropy

Jennifer Harris, Director of Stewardship, Peddie School

Deanna Harkel, Assistant Director of Development Communications and Student Engagement, Peddie School

This session will explore how to build a comprehensive student philanthropy program that cultivates awareness, gratitude, and giving. Many institutions have these student programs, but most lack a cohesive and strategic outline. Peddie School has effectively established a student ambassador organization which directly supports our alumni and development initiatives. The group engages fellow classmates in philanthropy while simultaneously playing a vital role in the stewardship process.

Join us to learn the core components of our successful Student Ambassador program. We will cover the initiatives of the program, annual thank a donor campaigns, how we incorporate multi-media into the stewardship process, and how best to partner with students to share the message of gratitude and impact. We will bring hard copy samples and feature a student “thank you” video.

Jennifer Harris has over eight years of advancement experience with four years specifically focusing on donor relations. Jenn began her development career in Higher Ed and over a year ago transitioned to working at a secondary independent school. Prior to joining Peddie School as the Director of Stewardship, she worked at The College of New Jersey as Coordinator of Stewardship & Donor Relations. Jenn is passionate about working in education and engaging students in the stewardship process so they learn early on the impact of giving, are grateful for the support, and grow to become esteemed alumni. In her free time, Jenn is involved in her sorority’s local alumnae chapter and serves on the executive board of Mercer-Bucks Alumnae of ZTA. She is also a PTA volunteer at her son’s grammar school. Jenn resides in Mercer County, NJ with her husband, Tom, and their children, Aidan and Emma.

Jenn and Deanna have been working together for over three years, previously at TCNJ and now together at Peddie. They have combined their professional experience to work to enhance stewardship communications at Peddie by also engaging students in the process and educating them on the importance of philanthropy.

Deanna Harkel joined Peddie in 2015, bringing with her five years of experience in communications, writing, and student engagement. Deanna began her career at The College of New Jersey where she worked as Communications and Community Outreach Coordinator and adjunct faculty member in the writing program. At Peddie, Deanna is Assistant Director of Development Communications and Student Engagement. She develops materials for annual, gift planning, and capital/endowment fundraising, and works to create compelling news stories and features that highlight the Peddie mission and core values. In addition to her communications work, Deanna is also faculty advisor of the Student Ambassadors, a group of selected students who work to further the mission of Peddie by providing valuable volunteer service to the Alumni and Development Office. Deanna and Jenn work closely together to incorporate students into the stewardship process through various fundraising and donor recognition activities. Deanna

holds a Master's degree from TCNJ and a Bachelor of Science degree from The Pennsylvania State University. She resides in Mercer County, NJ with her husband, Jon.

3B: Metrics, ROI, and Improving the Bottom Line: A How-To Guide to Demonstrating the Impact of Donor Relations

Cheryl Lintner, Assistant Director of Donor Relations

RWJ University Hospital Foundation and Somerset Health Care Foundation

Are you struggling with metrics to demonstrate the impact of what you do? Not really a data geek? If you want to use metrics but do not know how, this session is for you. I will present a step-by-step guide to defining metrics and demonstrating return on investment (ROI) that includes: (1) Defining Your Tools, (2) Measuring the Effectiveness of Your Tools, (3) Using These Metrics to Demonstrate ROI, (4) Improving the Bottom Line, and (5) Presenting Results. With a little math and some charts, you will walk away with an action plan to begin analyzing metrics at your own institution.

Cheryl Lintner started her development career in 2008 in a small Los Angeles non-profit based within a healthcare institution. She moved to donor relations in higher education at Rutgers University in 2010 where she managed gift agreements, stewardship reporting, and capital pledge reminders. In 2013 she returned to healthcare at the RWJ University Hospital Foundation to develop the Foundation's first comprehensive donor relations program. She currently serves as Assistant Director of Donor Relations and oversees acknowledgements, recognition, stewardship reporting, and donor engagement events for three hospital foundations within the RWJ Health System. Prior to her work in the non-profit sector, Cheryl worked in the legal field and in academia. She holds a Bachelor of Arts in Anthropology and History from the University of Delaware and a doctorate in Anthropology/Archaeology from the University of California, Berkeley.

3C: Spring Cleaning Your Donor Relations Program

Madelyn Jones, Director of Donor Relations and Stewardship, Worcester Polytechnic Institute

Ever feel like you have too much on your plate? Or wonder why you're responsible for something that someone else should be and vice versa? And how will you ever tackle those cool projects on your wish-list? When we lack a clear plan, our donors feel it. As Donor Relations professionals, we want to improve the donor experience. But to make progress externally, we must first do some housekeeping internally. By Spring Cleaning your donor relations program, you can minimize time-wasters, create bandwidth and most importantly, deliver the best experience for your donor. In this session, we will walk through the specific steps you'll take to get your shop looking spiffy. We'll start with big picture questions like, "what is Donor Relations responsible for?" and eventually we will work our way down to allocating specific responsibilities to people within your organization - including those awesome wish-list items. After taking these steps, your Donor Relations shop will be more organized than Martha Stewart's closet. PS: Not a manager? That's okay. The same model can be applied to your position.

Madelyn Jones is the Director of Donor Relations and Stewardship at Worcester Polytechnic Institute. Since beginning her Donor Relations career in 2012, she has won a CASE District 1 Excellence Award for

Donor Stewardship programs, been honored with a CASE scholarship, and been the grateful recipient of the ADRP Sheryl A. Blair Scholarship. Jones began her career in Austin, Texas working in the family business providing personalized gifts for event planners and marketing products for corporations. She was later Marketing Coordinator for an oil and gas investment bank in Houston, Texas, handling event logistics and rolling out the red carpet for top clients. When she moved to a state where higher-ed institutions were more plentiful than oil derricks, she found a home in Donor Relations. She is grateful each day that she is in an industry where she can translate her for-profit experience into something more meaningful. Jones shares, "I have the best job in the world. I get to thank people every day and show them that their generosity is making a difference in this world."

NETWORKING ICE CREAM SOCIAL

3:10pm - 4:00pm
