

Southeast Donor Relations Conference
of the
Association of Donor Relations Professionals
June 9-10, 2016
UAB Alumni House

Conference Program

This information has not been finalized and is subject to adjustment prior to conference.

Thursday, June 9

- 9:00 a.m. Registration and Morning Coffee
- 10:00 a.m. Introduction and Welcome
Michelle Hussey, UAB Assistant Vice President for Advancement Services, and Daphne Powell, UAB Senior Director of Stewardship and Donor Relations
- 10:15 a.m. Keynote Address: Love: It's What Makes Stewardship Stewardship
Virginia Gilbert Loftin, UAB Assistant Vice President for Development Communications

In the wild world of fundraising and the chaos of facilitating donor gifts, how do find and tell the stories that inspire others to give to your great cause? This session will provide important components of storytelling and marketing that will boost your success with your donor relations efforts. Create champions for your donors across your organization and establish a donor-centered community to increase giving.

Virginia Gilbert Loftin is Assistant Vice President for Development Communications at UAB. She is responsible for the development and implementation of an integrated communications strategy related to the \$1B *Campaign for UAB*. A Birmingham native and a journalism graduate of the University of Alabama, she spent her early career as a reporter and editor, including seven years as Lifestyle and Entertainment Editor for *The Birmingham News*. From 1997 to 2001, she was Director of External Relations for Samford University's Cumberland School of Law, where she coordinated the school's media relations, publications, and Web site. She was Director of Development and Alumni Affairs for the School of Nursing at UAB from 2001 until June 2005, when she moved to the School of Medicine as Senior Director of Development for the Department of Medicine. After 10 years in Medicine, including six as its Executive Director of Development, she moved to her current position in April 2015.

Virginia serves as President of the Delta Zeta Sorority National Foundation, and received the sorority's Achoth Award at the 2012 National Biennial Convention. She is a member of the Kiwanis Club of Birmingham and is a past president of The Women's Fund of Greater Birmingham and of the YWCA of Central Alabama's Junior Board. A member of Leadership Vestavia Hills Class of 2000, she was a Vestavia Hills Citizen of the Year nominee in 2001. A sustaining member of the Junior League of Birmingham, Virginia won the League's Dottie Haynes Service Award in 1997 and was named Sustainer of the Year for 2002. She was named a Girl Scout Woman of Distinction in 2006. Virginia and her husband, Robert Lee Loftin III, live in downtown Birmingham. They have one daughter, Emily Perrin Britt of Lexington, Kentucky.

- 11:15 a.m. Break
- 11:30 a.m. Session 2: How to Conduct a Stewardship Audit J. Kay Couglin

Deciding which donor relations programs to enhance, overhaul, or drop is crucial to the effectiveness of your program over time—but how do you begin? In this session, participants will learn how to conduct their own donor relations audits and prioritize their findings. Participants will also learn top tips on making the case for reallocating resources within an organization.

J. Kay Coughlin has 20 years of experience in non-profit management and fundraising, from the tiniest of performing arts organizations to liberal arts universities. Her career focus has been on helping small fundraising programs maximize donor impact while minimizing use of resources. Kay has a blend of experience which is rare in the fundraising industry, balanced between frontline fundraising and development support services. Kay has served as a major gift officer, grants manager, technology director, gift records manager, and database super user. Kay spent eight years at the helm of a donor relations program at a college, designing programs to capitalize on the behavior patterns of donors and the fundraisers and technologies who support them. She has a decade of experience teaching the fundamentals of fundraising, is a frequent presenter in fundraising and stewardship/donor relations circles, and has led numerous strategic- and project-planning processes. She lives with her husband and children in central Ohio. Kay can be found on LinkedIn at <https://www.linkedin.com/in/jkcoughlin>, and on Twitter: @DonorsArePeople.

12:30 p.m. Networking Lunch

1:45 p.m. Session 3: Making It Personal—Taking Individualized Stewardship to the Next Level
Kelli Queen and Meredith Cole, University of North Carolina, Wilmington

This presentation will focus on some of the neat personalization that the University of North Carolina Wilmington is using to steward top donors. Examples will be shared, including top-level thank-you cards sent by leadership, personalized endowment reports, Thanksgiving cards sent from scholarship recipients to their donors...And more!

Kelli Queen is no stranger to fundraising and donor relations, having spent more than eight years within the Division for University Advancement at the University of North Carolina Wilmington. In her roles as special events assistant and special events coordinator, she gained extensive hands-on experience with event planning within a university setting. Drawing on the experience she also gained in stewarding donors, Kelli accepted the role of assistant director of Donor Relations for stewardship and engagement in 2013. Now, she focuses on engaging and stewarding current and prospective donors with the university by sharing its story and showcasing Seahawk students. Kelli graduated *cum laude* from UNCW in 2004 with a B.A. in Communication Studies, a minor in English, and a Certificate in Professional Writing.

Meredith Morris Cole is the Stewardship Coordinator at the University of North Carolina Wilmington. A native of Wilmington, she graduated from UNCW in 2012 with her B.S. in Business Administration with a concentration in International Business. She joined the office of Events and Donor Relations in November 2013 assisting with various stewardship initiatives. Her responsibilities have included writing acknowledgement letters for major donor gifts from senior leadership, writing scholarship agreements, creating stewardship print materials, compiling information for the endowment reports, and working with development staff on other various unique donor experiences for major donors. Meredith has taken the lead on several projects including revitalizing the scholarship thank you writing process for students as a means to better steward UNCW scholarship donors.

2:45 p.m. Break

3:00 p.m. Session 4: Engaging Students in Scholarship Stewardship
Shannon Retzbach, The College of William and Mary

Student involvement in the thank-you process can be challenging, especially at public institutions. How do we encourage participation in thanking donors without setting requirements? William & Mary reached a high of 82% participation for the student thank-you process, employing a variety of strategies to reach this number. Success comes from building a strong communications plan and engaging the right stakeholders. The intake and processing of information can be as challenging as increasing participation. Learn how William & Mary is implementing the Scholarship Profile application, which increase the efficiency of producing final packages for donors and reduce staff time on production.

Shannon Retzbach is the Stewardship Coordinator of the office of Donor Relations, Stewardship & Special Events at the College of William & Mary in Williamsburg, Virginia. She is tasked with providing stewardship touches to donors by gathering data points from across the university and presenting them in meaningful ways. Her tasks include managing the student thank-you process, honor roll, assisting with endowment reports, conducting fund use and compliance audits, assisting with stewardship events, and database management. Prior to working in donor relations, she held positions in the annual giving and athletic special events office for William & Mary, where duties included volunteer program management, gift documentation, sponsor solicitation, events support, and database management. She received her B.A. in history from The Catholic University of America in 2008 and her M.A. in history from William & Mary in 2014. Her career passions include research in institutional archives, database integrity, and student engagement and development.

4:00 p.m. Adjourn

4:30 p.m. Networking Reception at Abroms-Engel Institute for the Visual Arts

Friday, June 10

Prior to start Morning Coffee and Brunch

9:00 a.m. Session 5: Things Every Donor Professional Should Know (Interactive Session)
Anne Manner-McLarty, Heurista, Inc.

Have you ever had trouble defining your goals or validating your work priorities? This interactive session will cover the key components of our work identified from a survey of seasoned professionals in the field. Additionally, we will look at ways that ADRP provides support in these key areas and explore the personal and professional benefits of volunteering for ADRP, whether through presenting, organizing an event or serving on an advisory committee. Links to resources and examples will be provided.

Anne Manner-McLarty is the president and lead consultant for Heurista, a multi-disciplinary firm dedicated to improving the authenticity of the stories told through donor recognition. This work draws upon Anne's experience and reputation as a thought leader in donor recognition and stewardship program planning. Anne has been an active participant in ADRP since 2005. She lives in Asheville, North Carolina.

10:00 a.m. Session 6: Creating a Stewardship Community
Tony Stringer and Teresa Kesler, University of Georgia

Learn how the University of Georgia has worked with key campus constituents to create a stewardship community—from individual meetings with key stakeholders to building a committee of team members to development and implementation of a comprehensive stewardship community plan. This session will provide ideas for you to develop critical relationships and activities to create a stewardship community at your organization.

Tony Stringer has been employed by the University of Georgia for 21 years and has held the position of Director of Donor Relations & Stewardship for the past eight. Prior to his move to the University's Donor Relations & Stewardship office, he served as Donor Relations Coordinator for UGA's Terry College of Business for over six years, and before that, he was part of the Student Services department at UGA's College of Education. A native of Athens, Tony received a Bachelor of Arts in Journalism from UGA's Grady College of Journalism and Mass Communication. He volunteers in the nonprofit sector with Advantage Behavioral Systems, and he has served as a Trustee of the Athens-Clarke Heritage Foundation and as a board member for the UGA Women's Gymnastics Ten-O Club. Tony enjoys travel and spending time between his home base of Athens and his getaway in the beautiful mountains of North Carolina.

Teresa Kesler serves as the Assistant Director of Donor Relations and Stewardship for the University of Georgia, a role she has held for seven years. She has worked in the University's Development and Alumni Relations Division for almost 20 years. Prior to her move to UGA's Donor Relations & Stewardship office, she worked in the IT department as a quality control and query specialist, and before that, she was employed in the Records department's data management area. Teresa attended Athens Technical College with a focus on accounting. She serves on the board of directors of her church and also spearheads an outreach effort to provide meals on the weekends for underserved children at a local elementary school. Teresa is a native Athenian and lives there with her husband Tommy. They are both avid Georgia fans!

11:00 a.m. Break (Move to UAB Hill Student Center)

11:30 a.m. Session 7: The Role and Impact of Donor Events and Alumni and Student Experiences
AND What's the Worst That Can Happen? Event Planning: Expecting the Best But
Planning for the Worst
Jill Forehand, Georgia Southern University
Susan Brenner, University of Montevallo

Developing a Culture of Philanthropy on Campus: The Role and Impact of Donor Events and Incorporating Donor Relations in Alumni and Student Experiences

During a campaign, key donor-centered events are all critical stewardship activities, providing an opportunity to engage major and principle donors and bring them back to your organization. These activities also can enhance existing events across campus and in alumni affairs in simple, cost-effective ways. This presentation will identify donor-centered events, primarily at a university in the midst of a comprehensive campaign, and it will distinguish their role and impact from other campus and alumni events. It will also explore how incorporating donor relations into traditional student and alumni-centered events can help your organization further develop a campus-wide culture of philanthropy.

Susan Brenner, CFRE, has developed a career in nonprofit resource development from the time of her undergraduate internship. She has more than 10 years of experience in fundraising and donor relations and has worked in the arts, education, and health care. She is the Donor Relations Manager at the University of Montevallo in Alabama where she is currently enrolled in the MBA program. Susan is a member of ADRP and the Alabama chapter of AFP. Giving back and volunteerism is important to her; she volunteers for and is a member of the Humane Society Auxiliary and Hands On Birmingham Junior Board. Originally from Ohio, Susan lived in Tennessee for 10 years before moving to Birmingham in 2015. She belongs to a seven-year-old Shepherd-Collie named Theo, who takes her on lots of long walks and trips to the dog park to play.

What's the Worst that Could Happen?? A Look at Event Planning: Expecting the best but Preparing for the Worst.

Jill Forehand

In the world of event planning, Georgia Southern University believes that if it CAN happen, it WILL happen...and they have the experience and stories to back it up. The presentation will cover what risk management procedures need to be in place prior to events happening, as well as how to execute events when everything goes wrong. The presentation will be interactive with possible scenarios and resolutions.

Jill Forehand serves as Director of Donor Relations at Georgia Southern University. The Office of Donor Relations has been in existence since 2012. Prior to that, Jill served as a Donor Relations Officer. Jill is a 1999 graduate from Georgia Southern with a BBA in Finance, and she received her MBA in 2011.

12:30 p.m. Lunch-and-Learn: Annual Giving Unwrapped with Special Guest Randy Kinder, UAB Director of Annual Giving

This informal session will provide an overview of how the annual giving program at UAB was completely revamped through the *Ever Faithful* initiative, describing key components from annual giving metrics to crowdfunding to social media and the inaugural Giving Day for faculty and staff on the UAB campus with the motto, "*Why give to the place that pays you?*" Most importantly, hear how annual giving stewardship is being used as a critical element of the overall strategy for gifts to the Campaign for UAB.

Randy Kinder is Senior Director of Annual Giving at The University of Alabama at Birmingham where he joined the team in 2014 and is coordinates all components of annual giving for the 10 colleges and schools of the university as well as all crowdfunding initiatives across campus. Previously, he was Director of Annual Giving at Colorado College and Assistant Director of Annual Giving at Colorado State University. He received his bachelor's degree in economics from Colorado State and his master's degree in philanthropic leadership from University of Denver.

2:00 p.m. Session 8: Improving Scholarship Fund Utilization, Compliance, and Stewardship
Brandon Phipps, AcademicWorks, Inc.

Scholarship awarding can be a huge challenge. Campuses typically have hundreds or even thousands of individual scholarship funds each with differing criteria. Individual colleges and departments may have

their own "unique" process for awarding which is difficult for administrators to monitor and impossible for students and to understand. As a result, campuses often struggle to fully award their scholarship funds in a manner compliant with donor intent, leading to significant challenges for donor relations professionals. During this session, we will discuss some of the common methods of scholarship awarding and identify best practices that campuses are using to streamline the process, improve utilization, and enhance donor stewardship efforts.

Brandon Phipps is CEO of AcademicWorks, a company providing comprehensive scholarship management solutions for the needs of colleges, universities and foundations. Over the past 20 years, Brandon has helped thousands of institutions re-invent their administrative processes through the use of technology. Prior to co-founding AcademicWorks in 2010, Brandon served as Vice President of Sales at several cloud based technology companies serving the needs of higher education including PeopleAdmin and Academic Software. Brandon has presented at numerous higher education conferences including NASFAA, NSPA, ADRP, Ellucian Live, HEUG Alliance, CUPA-HR and NACE on how technology can improve higher education administration. Brandon is a graduate of Texas A&M University and lives in Austin, TX.

3:00 p.m. Adjourn/Self-Guided Tour