

7th Annual New York City Regional Conference — March 10, 2017

Welcome!

Thank you for joining us in Manhattan for the 7th Annual NYC Regional Conference presented by the Association of Donor Relations Professionals—a day of great conversation, thoughtful presentations and fun!

Many of us who have been ADRP members for a number of years know that one of the best values membership provides is the opportunity for peer networking. We gain immense benefit from the chance to share stories with colleagues in similar and different organizations. We hope that you will take the opportunity today to do just that—bring your stories to the table to enlighten each other and help build our collective wisdom.

If you're not a member of ADRP, feel free to talk with us about the value of membership and check us out at our website: www.adrp.net.

We also hope you go away from this day refreshed, energized and full of new ideas on how to make your job more efficient, satisfying and productive.

Warm regards,

7th Annual NYC Regional Committee

Kelly Brennan

Memorial Sloan Kettering Cancer Center

Aimee Clark

New York University

Katie Kutney

Berkshire School

Stephanie Lamphere

SUNY Empire State College

Cheryl Lintner

Meridian Health Affiliated Foundations

Ashley Tyner

Union College

The Association of Donor Relations Professionals (ADRP) supports and enhances all aspects of fundraising and development by promoting the status of donor relations and stewardship offices through education, professional development and networking opportunities. ADRP is pleased to support and offer professional growth opportunities as a core commitment to its membership. By facilitating communication and idea-sharing among colleagues in the field, ADRP has quickly become a leader among its peers and your best connection to inspired stewardship.

As the authoritative organization and advocate for the donor relations and stewardship profession, ADRP finds its roots in the success of the New England Stewardship Conference, held annually from 1992 to 2003. It was the vision of ADRP's founding members to bring increased visibility to the field—for donor relations and stewardship professionals from all types of organizations across the globe. As such, our international membership comes together in person and online to share best practices, exchange new approaches and develop long-lasting connections.

ADRP is the only organization focused solely on stewardship and donor relations across such varied institutions as museums, foundations, hospitals, colleges and universities, as well as other social service and non-profit institutions. Welcome to the ADRP network!



8:30am – 9:30am

REGISTRATION & BREAKFAST

2nd Floor Events Hall

9:35am – 10:30am

WELCOME AND KEYNOTE

Edmond J. Safra Hall



Pushing Philanthropy to the Margins

*Ted Bunch, Chief Development Officer
A Call to Men*

*Introduction by Walter C. Williams, Vice President for Advancement
Executive Director, Empire State College Foundation
SUNY Empire State College*

Ted Bunch, Co-founder and Chief Development Officer for A CALL TO MEN, will discuss the vital role of philanthropists as funders and partners. He implores funders to look beyond the mainstream to the margins to help solve issues for those most complexly impacted. Bunch will address the importance of and common barriers to donor engagement with grassroots organizations, as well as why general operations support is a lifeline to many nonprofits.

Ted Bunch is an educator, activist and lecturer working to end all forms of violence and discrimination against women and girls. Bunch is Chief Development Officer of A CALL TO MEN and is internationally recognized for his efforts to prevent violence against women while promoting a healthy, respectful manhood. He is a leading voice on male socialization, the intersection of masculinity and violence against women and healthy, respectful manhood. Bunch is also the former director and co-creator of the largest program for domestic violence offenders in America. His innovative work laid the groundwork for the prevention strategies now endorsed as best practice in engaging men to end violence against women. Bunch developed and implemented model response programs for police, fire departments, emergency medical technicians, paramedics and other first responders dealing with domestic violence.

As an adviser to the National Football League, National Basketball Association, National Hockey League and Major League Baseball, Bunch provides policy consultation and facilitates violence prevention and healthy manhood training. He was a guest presenter for the United Nations Commission on the Status of Women and the United Nations Alliance of Civilizations. He is an international lecturer for the U.S. State Department and was appointed by UN Secretary General Ban Ki-moon as a committee member to UNiTE, an international network of male leaders working to end violence against women. Ted's work has been featured in the UK, Israel, Suriname, South Africa, Ghana, the Democratic Republic of Congo, Brazil and Puerto Rico. Bunch is the co-author of the LIVERESPECT™ Coaching Healthy & Respectful Manhood Curriculum, designed to prevent violence and bullying in school and sports. He is sought after for his impactful and engaging sexual assault prevention programs for high school- and college-aged boys, and has trained extensively in colleges and universities. Bunch is a frequent guest on national television and radio programs and has served as a script consultant for the Emmy Award-winning television series Law & Order: Special Victims Unit.

10:45am – 11:45am

SESSION 1

Strategic Growth: Using Research and Donor Input to Expand Your Program

1A: Edmond J. Safra Hall

Lisa C. Honan, Executive Director of Development, Syracuse University
Megan McAndrews, Director of Donor Relations, Syracuse University

Do you need to expand your donor relations program? Increase your budget? Add new staff? Are you in need of a complete restructure? This session will provide you with a research-based method for a multi-year expansion of your program including tips on how to add critical components and also how to STOP doing the unnecessary. The presenters will walk you through the steps taken at Syracuse University over the last two years to rebuild a program, as well as provide helpful hints from other organizations.

Lisa C. Honan is Executive Director of Development at Syracuse University. She established the Donor Relations office at Syracuse in 1998, supervising five staff responsible for all donor recognition and stewardship activities. After ten years in that role and five years as the chief fundraising officer for the Maxwell School of Syracuse University, she returned to a central role at the University in 2014 and now oversees prospect and pipeline management, donor relations, research and data analytics. Lisa is a founding member of the Association of Donor Relations Professionals and was Treasurer of the association from 2007 through 2012. She chaired the 2007 CASE Conference for Donor Relations and co-chaired the ADRP International Conference in 2004.

Megan McAndrews currently serves as the Director of Donor Relations at Syracuse University where she oversees a team responsible for the acknowledgement, recognition and stewardship of all donors to the University. Prior to arriving at SU, Megan built stewardship programs at the University of Vermont and Indiana State University. She has served as the Vice President of the Association of Donor Relations Professionals Board of Directors and received a Master's degree in Philanthropic Studies from the Lilly School of Philanthropy at Indiana University.

Providing a Framework for Decision Making: An Insider's View on Executive Solutions

1B: Classroom 1

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

Decisions, decisions, decisions—we make them every day, sometimes several a day. We are also affected by the decisions of others. Many of us are charged with finding solutions for complicated issues involving multiple stakeholders, internal and external. This session will explore and translate how to use *Bolman and Deal's Four Frames of Leadership: Structural, Human Resource, Political and Symbolic* in any professional setting, especially decisions impacting donors and those including change. The four frames can be applied to singular or group decision making. Whether you are early or mid career,

learning the secrets of executive decision making will aid in your professional growth. Session format includes an overview of the four frames of leadership, case study and Q& A.

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 on the Board of Directors 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.

This Way to the Afterparty: How to Steward Strategically Post-Campaign

1C: Classroom 2

Katie Kutney, Associate Director of Advancement, Berkshire School

The balloons have dropped. You've met—even exceeded—your campaign goal. You've recognized and publicly thanked campaign leadership, principal donors, annual fund volunteers. Now what? This session will share data-driven insights into whom, and how, you should be stewarding after a major campaign. The campaign donors who emerge as the most prominent contributors post-campaign may surprise you.

Katie Kutney is associate director of advancement at Berkshire School, a New England preparatory school for students in grades 9-12. At Berkshire, she leads advancement communications, donor relations, strategy, and prospect management. Her focus is on driving integration of messaging and intent across all communications with constituents to build and strengthen their relationships with the School and with each other. Prior to Berkshire, Katie led donor relations at The Pingry School in Basking Ridge, NJ and managed donor recognition at Rutgers University Foundation. A past presenter at international and regional conferences, she graduated from Princeton University with a degree in Religion and earned a Master's in Public Administration from Rutgers University.

Noon – 1:00pm**LUNCH BREAK****2nd Floor Events Hall**

Lunch catered by Legendary Affairs – Madison & Park Hospitality Group

1:05pm – 2:05pm

SESSION 2

How to be Like Martin Scorsese*Lynne Wester, Donor Relations Guru*

2A: Edmond J. Safra Hall

You don't need a big budget and Leonardo DiCaprio to make a good video. In today's media age, people are more likely to watch a video than they are to read a communication. While some development shops are leading the charge with full-time on-staff videographers, unfortunately too many are underutilizing this effective communication vehicle. In this practical session Lynne will share video samples and discuss how to personalize video for target audiences using inexpensive and easy-to-learn tools of the trade.

Lynne Wester, widely known for her Donor Relations Guru blog and website, has quickly become the leading resource for creating donor-focused fund raising strategies. Using her expertise and hands-on approach, Lynne works with organizations to keep their focus donor driven, technologically savvy, strategic and always with a splash of good humor. Lynne has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy, and other industry publications. The DRG website and blog receive more than 100,000 visits a week and Lynne's monthly webinars regularly draw hundreds of viewers. A loyal University of South Carolina gamecock alumna, donor, and fan, Lynne also holds a Master's degree 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. She is also a former Director of ADRP.

"In lieu of flowers": A Case Study in Stewardship & Retention of Memorial Gifts*Beth Bryant, Senior Director of Donor Relations, Hospice & Palliative CareCenter*

2B: Classroom 1

There is more than one point of entry for a potential donor to become a donor. One of these is memorial gifts given in response to an obituary notice: "In lieu of flowers, please make donations to --." Many memorial donations are in fact transactional, and we may assume they are just passing through—a gift in memory of dear old Aunt Agnes so a cousin will get a condolence message. How do you approach this type of donor? Learn how one organization decided to make a concerted effort to move as many memorial donors as possible from transactional into a relationship through stewardship, storytelling and solicitation. Moving 10% or even 20% into an ongoing relationship translates into huge dollars!

Beth Bryant is Senior Director of Donor Relations with the nonprofit Hospice & Palliative CareCenter in Winston-Salem, NC. She is responsible for engaging donors and delivering the best possible experience by letting them know how they have made a difference and that they are valued. Beth's philosophy is that all of her organization's supporters deserve to be treated with gratitude and respect because they make

Hospice & Palliative CareCenter's important work possible. She aims to deepen relationships with donors in order to encourage them to support again—ideally long-term—since it is far more cost effective to cultivate repeat support from someone who has given before than to find an entirely new donor. Beth's stewardship plan focuses on: thanking donors, educating donors and deepening relationships with donors.

A Minute to Win It in the Big Apple

Facilitator: Cheryl Lintner, Director of Donor Relations, Meridian Health Affiliated Foundations

Panelists: Julie Bostian, Boston College; Rosalind Herbsman, Northwell Health Foundation; Mitra Keykhah, Princeton University; Katie Kutney, Berkshire School; Cheryl Lintner, Meridian Health Affiliated Foundations; Debbie Meyers, University of Maryland

2C: Classroom 2

Join us for an ADRP conference favorite with a local twist. A panel of presenters will share some of their best ideas with the audience in a quick, rapid-fire format. We will then open the forum to questions, discussion, and more idea-sharing from attendees.

2:10pm – 2:25pm

BREAK & AFTERNOON SNACK

2nd Floor Events Hall

Have a bite to eat while you network and visit vendors!

2:30pm – 3:30pm

SESSION 3

It's the 15th Anniversary of a Transformative Gift: Now What?

Nichole Mastrianni, Director of Stewardship, Rutgers University

Roberta O'Hara, Senior Director of Donor Relations, Rutgers University

3A: Edmond J. Safra Hall

As human beings, we view the recognition of milestones as a mainstay in all of our relationships. Throughout history, in every country, culture and religion, major life-cycle events have been marked with celebrations and communications. For instance, Jewish boys are ushered into adulthood at age 13 with a Bar Mitzvah ceremony, surrounded by family and friends. The Holy Roman Empire gave birth to the wedding anniversary gifts we still give today: silver for the 25th and gold for the 50th. In some Hispanic countries, as well as in Portuguese-speaking Brazil, the *quinceañera* or *festa de quinze anos* celebration traditionally marks a girl's 15th birthday. The list of examples is as long and as varied as our cultural, religious and national differences. It only makes sense then as professionals tasked with building and maintaining relationships with our respective institutional donors that we look to milestones in those relationships with the organization as natural points to celebrate, recognize and



7th Annual New York City Regional Conference — March 10, 2017

acknowledge. In this session we will share examples from many institutions of ways in which they have put the spotlight on major milestones in the life-cycle of a donor's relationship with the non-profit. Included in the examples will be how Rutgers researched and identified a variety of milestones for their top donors and how those milestones are being acknowledged going forward.

Nichole Mastrianni recently (and happily!) returned to Donor Relations after a three-year stint as a frontline fundraiser for Make A Wish New Jersey. As the Director of Stewardship-Recognition at the Rutgers University Foundation, Nichole oversees a team of four people who specialize in personalized recognition opportunities designed to steward top-level donors. In her 12 years in Donor Relations, Nichole has overseen donor walls, recognition societies, large-scale and intimate donor events, acknowledgments and receipting, and she is excited to soon foray into the world of endowed funds and fund agreements. Nichole has previously presented on the "Lifecycle of a Gift," which helps to illustrate the journey gifts take from inception to receipting and acknowledging as well as "Demonstrating Donor Impact in 60 Seconds or Less."

Roberta O'Hara joined the development staff at Princeton University in 1986, and over the years, rose in ranks, eventually holding the senior leadership position in stewardship. In 2014, Roberta returned to her undergraduate alma mater, Rutgers University, as Senior Director of Donor Relations, with oversight of Events, Stewardship Accountability and Stewardship Recognition. Roberta was a founding member of the New England Stewardship Conference, which ultimately became the Association of Donor Relations Professionals. A frequent presenter at conferences, Roberta has also served as the inaugural treasurer of ADRP; Content Chair, ADRP International Conference (2014); and Conference Chair, ADRP International Conference (2015). Roberta holds a Bachelor's degree in English and Psychology from Rutgers and a Master's degree in English Literature from Northeastern University.

Lessons from Loss: Advancing Through Tragedy

Vanessa DiCarlo Carta, Director of Donor Engagement and Stewardship, University of Massachusetts Boston

3B: Classroom 1

Three years into a campaign and two days after commencement, our beloved Vice Chancellor for University Advancement died tragically. Our organization had never planned for this possibility, and we were totally unprepared for the personal and professional challenges that followed. This session will explore how our team and our university reacted to this loss, share valuable lessons we learned the hard way and identify how your organization can begin to make an emergency succession plan. Topics will include: communicating about death with donors and top prospects; stewarding family and colleagues; leadership transitions; appropriate outlets for mourning and how to handle the not-so-appropriate reactions in the workplace; and things we wish we'd planned for sooner.

Vanessa Carta is Director of Donor Engagement and Stewardship at the University of Massachusetts Boston, which is currently in the middle of a \$100 million campaign. Her eight years at UMass Boston have been spent exploring ways to enhance the donor experience with endless encouragement from university leadership. Vanessa brings certified yoga teacher training and a master's degree in Conflict Resolution to

her work—both are required daily. She was also a proud recipient of ADRP's Sheryl Blair Scholarship in 2012.

Snap Out of It! Changing Your Outlook on Donor Communications

3C: Classroom 2

Debbie Meyers, Senior Director of Donor Relations and Stewardship, University of Maryland

Are your acknowledgments a series of fundraising Madlibs? Do you suffer from chronic writer's block? Are your publications in first person and do they sound like a British literature essay? Time to snap out of it! This session will show you new ways to look at your donor communications—format, medium, content, tone and word choice. You'll learn how to write FOR your donors, not AT them, in compelling ways that get across your message and gratitude. Though we won't delve into grammar, punctuation and syntax, a supplementary style guide will provide you with tips and mnemonics to review on your own.

Debbie Meyers is Senior Director of Donor Relations and Stewardship at the University of Maryland. Previously she was Director of Donor Services at Carnegie Mellon University for eight years, where she oversaw donor relations, stewardship, events and gift documentation. At the University of Florida Foundation, as Director of Stewardship and Donor Relations for nine years, she served as a central resource to more than 45 development officers at 20 colleges and units. Her development career began in 1986 as Publications Director for UF's health center development office, then as Development and Alumni Director at Bishop Moore High School (her alma mater), and Development Director at the Orlando Museum of Art. A founding board member of the Association of Donor Relations Professionals, she earned a Bachelor's degree in English from Loyola University in New Orleans and a Master's degree in Journalism from UF.

**THANK YOU FOR JOINING US!
WE HOPE TO SEE YOU AGAIN NEXT YEAR.
FOR MORE INFORMATION ABOUT ADRP,
PLEASE VISIT WWW.ADRP.NET**

A SPECIAL THANKS TO OUR SPONSORS!



1157 designconcepts designs and fabricates custom donor recognition solutions, history displays, hall of fame projects, plaques, room signage and interactive displays. With a focus on the not-for-profit market, the company services major colleges, leading healthcare institutions, independent schools, YMCAs and other organizations throughout the United States and Canada. Visit www.1157designconcepts.com for more information.



Under the leadership of Anne Manner-McLarty, Heurista works with non-profit organizations, such as universities, hospitals, secondary schools, arts and civic organizations to maximize their community messaging. We're expert storytellers with the ability to convert your unique content into dynamic user experiences. We're familiar with print, web, interactive and hardscape design. And, beyond our creative skills, we bring the ability to develop sustainable processes and document procedures. We specialize in consulting relative to donor relations, stewardship programs and donor recognition. Visit www.heurista.com for more information.

A SPECIAL THANKS TO OUR SPONSORS!



We design, manufacture and install architectural and interactive donor recognition displays, history exhibits and environmental graphics. Our expertise helped us create Giftmap, a map-based tool that will help you plan, document and manage funding opportunities and recognition inventories. Giftmap has become the central planning and communication platform for some of the most respected fundraising shops across North America. Visit www.pdgdesign.net for more information.

DONORWALL DESIGN GROUP

DONORWALL DESIGN GROUP provides one of a kind and off the shelf donor recognition solutions—DONOR WALLS, DONOR PLAQUES, CUT LETTERS AND DIGITAL DISPLAYS. Our products and service are considered industry benchmarks. What sets us apart is our work is inspired by the fine arts. We design to help you build your donor base and at the same time garner larger donations—this is an art and not an accident. Call us at 877-366-6792, e-mail us at info@donorwall.com, or visit www.donorwall.com for more information.



A SPECIAL THANKS TO OUR SPONSORS!



AcademicWorks is the leading provider of scholarship management solutions. Over 400 colleges, universities, and foundations use AcademicWorks to match students with relevant scholarship opportunities, create awards, and recognize scholarship donors. Visit www.academicworks.com for more information.



At Harris Made we proudly partner with ADRP Donor Professionals to create custom recognition gifts so you can amaze donors that often want for nothing. All designs are unique to your institution, handmade by our master craftsmen, and never made available for purchase. Our ninth generation family-owned mill in England proudly weaves the scarlet uniform fabric worn by the Queen's Guard at Buckingham Palace and is a recipient of a Royal Warrant, the ultimate seal of approval for exquisite quality and service. We would love to be of service if like other ADRP Donor Professionals you struggle to find unique and affordable gifts rich in tradition and provenance. We very much look forward to meeting you at the 2017 ADRP NYC Conference. For more information, please visit www.harrismade.com or call us at 312-952-5568.

A SPECIAL THANKS TO OUR SPONSORS!



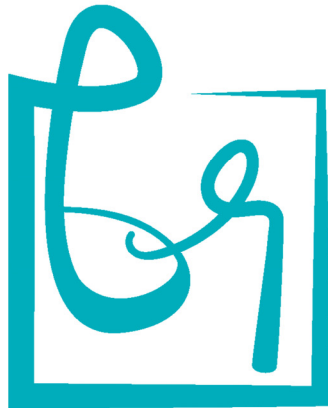
For over half a century, Honorcraft has delivered a potent fusion of experience and innovation in the design and fabrication of all facets of donor recognition. LegacyCurator, a comprehensive service helps you discover, preserve, and honor your philanthropic heritage. Walls go up. Plaques come down. Heritage fades. And philanthropic momentum can be lost. We can help. Ask us about LCTracker, our web-based donor recognition management tool. Visit us online at www.honorcraft.com.

The logo for W&E Baum features the letters "W&E" in a large, blue, serif font, with a grey ampersand. Below this, the word "BAUM" is written in a larger, blue, serif font. A small, white, starburst graphic is positioned to the right of the letter "M".

Designers and Manufacturers
Donor Walls • Plaques • Awards • Memorials

W&E Baum, designers and manufacturers of Donor Recognition and Memorial Walls, Giving Trees, Cast Plaques, Awards, Lettering and Signage. We offer complete solutions to fulfill your recognition and memorial needs with both traditional and contemporary designs. Visit www.webaum.com for more information.

A SPECIAL THANKS TO OUR SPONSORS!



BROOK
RECOGNITION

With over 30 years of experience and more than 500 installations Brook Recognition is a forward-thinking business focused on Donor Recognition Strategies to help non-profits achieve their fundraising goals. A new innovation, The Recognition Paradigm Shift® will revolutionize the way you look at donor recognition, as well as enrich your donor's experience. Be sure to visit our exhibit to learn more about this exciting new perspective! Visit www.brookrecognition.com for more information.

WhiteBirchVt

WhiteBirchVT is a corporate gift and award company representing American Made lines. All of the lines can be customized with logos and text. The items are perfect for Capital Campaign Gifts, Donor Gifts, Retirement and Employee Milestones. All of the lines are made by individuals that take pride in their products.

Visit www.whitebirchvt.com for more information.



Save the Date!

ADRP's 14th Annual International Conference September 26-28, 2017 at the Rio Las Vegas

Join donor relations and stewardship professionals from around the world this fall at the 14th Annual Association of Donor Relations Professionals International Conference in Las Vegas, Nevada, Tuesday through Thursday, September 26-28. As an attendee at the largest international conference dedicated to donor relations and stewardship, you will bring your knowledge to help other professionals, whether just starting in the field or experienced in several areas of philanthropy.

Have a great idea you want to share? Submit a proposal online at www.adrp.net. The deadline has been extended to Monday, March 13, 2017.