ADRP

ASSOCIATION OF DONOR RELATIONS PROFESSIONALS

BUILDING RELATIONSHIPS FOR GOOD

Welcome!

Thank you for joining us in New York City at the Museum of Jewish Heritage—A Living Memorial to the Holocaust. We are delighted to welcome you to the 10th Annual NYC Regional Conference, presented by the Association of Donor Relations Professionals (ADRP)!

It has been three years since we last came together for a day of compelling presentations and connections across fields. As ADRP's first in-person regional conference since the pandemic, this will look different than previous events. We are excited to host a smaller gathering, with multiple opportunities throughout the day for in-depth conversation in even more intimate groups.

One of the greatest values of an ADRP membership is an experience like this—engaging with colleagues who thrive on exchanging ideas and best practices. Whether you are a long-time member or a newcomer, we invite you to share your stories and what inspires your work. Our combined expertise and contributions further build on the critical role donor relations plays in advancing organizations and missions. We hope you will return to "the office" with new contacts, tools, and motivation.

It is not too early to volunteer for next year's planning committee and help guide where and when the conference will be held, and what the focus will be. For more information about ADRP, the benefits of membership, and to get involved, please visit www.adrp.net. Feel free to ask questions and talk to any of us!

Warmest regards,

10th Annual NYC Regional Conference Committee

Stephanie Lamphere, Co-Chair SUNY Empire State College	**Cheryl Lintner** Hackensack Meridian Health Foundation
Mélissa Malebranche, Co-Chair New York University	**Debbie Meyers** EDiT!
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Angela Camacho Baruch College	**Jillian Perrin** Children's Hospital of Philadelphia
Linda Colquhoun Teachers College, Columbia University	**Lauren Shoor** Communications Consultant
Nayeli Garcia Mowbray Nonprofit/Donor Relations Consultant	**Guycaelle Vaval** Pace University

The Association of Donor Relations Professionals (ADRP) is the diverse community of donor relations professionals sharing education, knowledge, and experience, empowering members to advance their careers and drive excellence in the field. 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, independent schools, colleges and universities, as well as other social service, non-profit, and advocacy organizations.

Welcome to the ADRP network!

SCHEDULE OVERVIEW

8:00–9:00 a.m..**Registration, Coffee & Breakfast, Vendor Time**

9:05–10:35 a.m..**Welcome, Introductions, and Keynote**

10:35 a.m–10:45 a.m..**Break**

10:45 a.m–11:45 a.m...**Session 1**

12:00–1:15 p.m..**Lunch Break**

1:20–2:20 p.m..**Session 2**

2:25–3:25 p.m..**Session 3**

3:30–4:30 p.m.....**Raffle Giveaways, Wrap-up, Vendor Time, and Afternoon Snack**

ENJOY THE CONFERENCE!

ASSOCIATION OF DONOR RELATIONS PROFESSIONALS
BUILDING RELATIONSHIPS FOR GOOD

10th Annual New York City Regional Conference–June 10, 2022

8:00–9:00 a.m	Registration, Coffee & Breakfast, Vendor Time	Events Hall, Second floor
9:05–10:35 a.m.	Welcome, Introductions, and Keynote	Edmond J. Safra Hall, First floor

Welcome Announcements from the Event Co-Chairs

Stephanie Lamphere, Director of Donor Relations, SUNY Empire State College

Mélissa Malebranche, Senior Associate Director of Stewardship, New York University

Greetings from ADRP President-Elect

Cheryl Lintner, Executive Director of Donor Relations, Hackensack Meridian Health Foundation

Remarks from Keynote Sponsor

Dave Gaspar, Director of Marketing and Business Development, PDG

Keynote: Building Trust

The Key to Increased Giving, Enhanced Reputation, and Job Satisfaction

Karen E. Osborne, Author and Senior Strategist, The Osborne Group, Inc.

A 2022 international study reported on trust levels for government, media, nonprofits, and corporations. The results are not good. You know that trust is at the core of relationships. It is at the heart of fundraising and marketing. And you know that you are critical to organizational trust building.

Join us for an inspirational, idea-packed, experiential conversation about how you can lead your organization, from the seat you are in, to increased trust resulting in more gifts, larger gifts, and enhanced reputation. We will help you with strategies, plans, and influencing skills. Others will see you as the leader and problem solver you are. Now doesn't that sound good?!

Learning Objectives:

- Increased ability to build trust with donors
- Increased skills in trust building with internal and external partners
- Burnished skills in influencing and leading from anywhere within the organization
- Enhanced enthusiasm for making trust building a priority

About the Speaker

Karen E. Osborne believes in the power of philanthropy, generosity, and service. She built her career around these passions not only as a major and principal gifts officer, speaker, consultant, and coach, but also as a donor, volunteer, and board member. Internationally recognized, Karen receives invitations from all over the United States and the world. For 18 of her 43 professional years, she held leadership positions at colleges and universities. Her last position was VP for Advancement, Trinity College, Hartford, CT. For the past 25 years, Karen served first as President and now as Senior Strategist at The Osborne Group, an international management, consulting, and training firm.

For seven years Karen served as an adjunct faculty member at Johns Hopkins University teaching two graduate courses in nonprofit management. Karen enjoys a rich volunteer life. The Council for the Advancement and Support of Education (CASE) awarded Karen the Crystal Apple for Outstanding Teaching and Public Speaking and the Ashmore Award for Outstanding Service to the Profession. She serves on the governing boards of Easterseals Florida and BBB Wise Giving Alliance and continues to volunteer for CASE as well as local charities.

Karen is a novelist: Getting It Right, *Akashic Books, was published in June 2017;* Tangled Lies, *Black Rose Writing, launched July 22, 2021; and* Reckonings *releases June 16, 2022.*

10:35–10:45 a.m. **Break**

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10th Annual New York City Regional Conference–June 10, 2022

10:45–11:45 a.m. Session 1

Session 1A: Building Trust

In-Depth Keynote Break Out
Edmond J. Safra Hall, First floor

Karen E. Osborne, Author and Senior Strategist, The Osborne Group, Inc.

Following the keynote address, join Karen for a more in-depth discussion on building trust in philanthropy.

Leading from the seat you're in, helping your team lead from their seats, and managing up and out are all essential skills. Following up on the keynote around building trust, this highly interactive workshop will help you sharpen your influencing skills, your ability to create alliances, connect to connectors, and persuade others. In the quest to persuade mission staff, volunteers, supervisors, and peers, this life skill is "a must have."

Join us for a highly experiential workshop, where we will explore, strengthen, enhance, or rev up your skills, motivation, and confidence. You will understand your current influencing skills and style. You will increase your understanding of others' needs, styles, aspirations, fears, motivations, and "gifts" that they can offer the organization. We'll explore new ways to uncover assumptions and beliefs that get in the way of adopting and adapting new ideas. You'll learn how to make a compelling case that others will "hear" and get an enthusiastic "yes" to your ideas and actions you seek.

Learning Objectives

- Increased influencing skills and ability to manage up and out
- Burnished skills in making a compelling case for change
- Increased abilities in getting others to say yes to your ideas and initiatives
- Enhanced skills in getting a seat at the decision-making table

Session 1B: Future Proofing Your Fund Terms

Classroom 1, First floor

David Hough, Senior Associate Director of Stewardship and Compliance
Northeastern University

None of us can predict the future. COVID proved we can't even predict three years into the future, much less 50, 100, or 200.

Yet when we draft fund terms, predicting the future is what we are required to do. How do we protect the donor's intent and our organization's needs? Who knows what majors, departments, or colleges may be renamed, or even eliminated? Who knows what an endowed fund's "buying power" will be?

What are the words, phrases, and clauses that are essential for not only endowed funds—but current use funds as well? Join in the discussion in this sharing, interactive session on gift agreements.

David says: "After 12 years of writing fund terms, I am still learning. I "think" I have everything covered... but do I? How about you?"

Learning Objectives

- Understand why out clauses are just as important for current use funds as for endowed funds
- Feedback and ideas on how to phrase out clauses to address common funding scenarios
- A phrase library of more robust out clauses for both our current use and endowed funds

About the Speaker

After college, David Hough started his own theater company. Several years later, looking for a job that paid, he started his career marketing for the performing arts—Boston Ballet, Handel & Haydn Society, Hartford Stage. Next, he managed events for a Borders Books and Music store, and then five years led community relations and fundraising in the social service field for Boston Living Center and the AIDS Action Committee. Then, 14 years ago he started in the donor relations department at Northeastern University. Initially tasked with scholarship reporting, around 12 years ago he also became responsible for drafting fund terms for individual donors and internal MOU's. Over those 12 years, and hundreds of fund terms later, he is still in search of the foolproof out clause.

Session 1C: Community Centric Fundraising

Classroom 2, First floor

Rachael D'Souza-Siebert, MPPA, Founder and Chief Purpose Officer, Gladiator Consulting

Systems are perfectly designed to produce the results they create. Nonprofits, and especially those that fund them, are often focused on alleviating the systems, or effects of inequitable systems—poverty caused by closed-off economic opportunities or poor educational outcomes caused by inequitable funding systems to local schools. We need to move from harm-reduction missions to systems change. In so doing, we will have needed to embrace Community Centric Fundraising to create the allyship and partnerships of the institutions and individuals to create change in our communities and to ensure that our nonprofits become obsolete. We need to decide if we are going to continue to do nonprofits and philanthropy the way we have for 100+ years, or if we are willing to make a change.

Learning Objectives

- Understanding how the history of philanthropy in the U.S. has perpetuated inequity
- The rise of CCF movement
- How to build equity, justice, and anti-racism into donor-funder relationships

About the Speaker

Rachel D'Souza-Siebert has built Gladiator Consulting by combining her experience in resource development and organizational culture with her personal commitment to centering community, seeking justice, and creating belonging for those who have been disenfranchised. Rachel models collaboration from an abundance mindset. In 2020, the St. Louis Business Journal honored Rachel with their Diverse Business Leader Award. She sits on the Board of the Association of Fundraising Professionals St. Louis, the c4 board of LeadMO, and the Community Advisory Board of Nine Network. As a founding member of the Community-Centric Fundraising Speakers Bureau and a member of the CCF Transition Team, Rachel has shared her work with fundraisers and nonprofit professionals across the country. In 2021, Rachel's perspective on systems change in resource development was featured in the Blackbaud Institute's npExperts publication, The Great Reset.

ASSOCIATION OF DONOR RELATIONS PROFESSIONALS
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10th Annual New York City Regional Conference–June 10, 2022

12:00–1:15 p.m. Lunch Break off site, on your own

(see Lunch Options handout for suggestions and map)

1:20–2:20 p.m. Session 2

Session 2A: The Unsession

Edmond J. Safra Hall, First Floor

Presented by the ADRP NYC Content Hosts
Linda Colquhoun, Senior Director, Stewardship & Donor Relations
Teachers College, Columbia University

ADRP President-Elect Cheryl Lintner, Executive Director of Donor Relations
Hackensack Meridian Health Foundation

Come join us for an "unsession," where the audience votes on discussion topics that are top of mind for all of us. Want to learn how your peers are handling scholarship dinners? Interested in starting a recognition inventory? Need help with stewarding major gift donors? This is the session for you. Whether you work in the arts, higher education, health care, or another sector, we all have the same goal: to steward our donors and steward them well. Come with your questions, concerns, and projects; prepare to talk about anything and everything; and walk away with solutions and ideas!

Learning Objectives

- Discuss best practices in donor stewardship, leadership, and social responsibility in fundraising
- Get answers to difficult questions and useful feedback from your peers and senior leaders in the field
- Dive deep into challenging donor relations and collaborate on both universal and unique solutions

Session 2B: Donor Love, For Life: Planned Giving Stewardship

Classroom 1, First floor

Suzanne Bellanger, Assistant Director of Stewardship Marketing, Brown University
Sierra Rosen, Executive Director of Planned Giving, Brown University

Planned gifts can have a transformational impact on an organization. Because planned gifts have uncertain timelines and are mostly revocable, special care must be taken to craft a plan that secures the donor relationship for decades to come.

The session will include an overview of the impact planned gifts can have on an organization's current and future revenue stream, along with industry stats and compelling anecdotes. We'll also present an outline for creating and executing a comprehensive yet cost-effective stewardship plan for legacy donors that helps show the impact of their future gifts now. We'll focus on three key elements of a successful plan, with examples of stewardship initiatives that helped Brown grow its Planned Giving program over the past five years.

We will also introduce attendees to Brown's College Hill Society, which recognizes alumni/ae and friends who have provided for Brown through gifts in their wills or life-income plans. The Society currently boasts a membership of more than 1,000 alumni/ae and friends and membership includes compelling benefits designed to help keep donors engaged with the university, and committed to providing ongoing support. College Hill Society donors also receive special recognition and opportunities to be featured in various publications. We'll discuss these benefits and opportunities and demonstrate how similar giving society programs could be successfully implemented at other institutions.

Learning Objectives
- Elements of a successful legacy donor stewardship program
- Do's and Don'ts for stewarding legacy donors
- Innovative ideas for keeping donors engaged for the long term

About the Speakers

Suzanne Bellanger is the Associate Director of Stewardship Marketing at Brown University. In this role, she leads the strategy, development, and execution of stewardship marketing and donor recognition programs for units across the Brown University Division of Advancement. She has previously held client management and marketing strategy roles at other mission-based organizations as well as marketing agencies focused on the non-profit sector. Suzanne is passionate about giving back and holds board of director positions for the Marion Art Center and Girls on The Run Rhode Island and volunteers as a grant writer for Our Sisters' School. She lives in Marion, MA, with her husband, Marc, and two children, Claudie and Gavin. Suzanne has been a member of ADRP since 2017 and is a frequent contributor to The HUB.

Sierra Rosen is passionate about helping non-profits advance their mission to create a sustainable future through planned giving. With 15 years of professional and technical experience in Development, she brings a strong combination of skills and collaborative abilities in assessing and managing planned giving programs. During her career, she has worked on multiple capital campaigns and acquired a deep and nuanced understanding of best practices in all areas of Development, including annual giving, planned giving, and principal gifts.

Sierra's breadth of experience has culminated in a proven track record in implementing best-in-class planned giving programs at diverse institutions and working with a wide variety of donors to close diverse planned and structured gifts. Her record and experience include working effectively in a complex institutional setting, developing and sustaining productive and effective relationships with donors, faculty, colleagues, and senior management. She has worked with trustees, alumni, parents, and friends—many of whom are thought leaders in their industry—to maximize their philanthropic impact.

Sierra has held positions at Brown University, Harvard Business School, Northeastern University, Wellesley College, and State Street Global Advisors. Sierra holds a Master's in Taxation from D'Amore-McKim School of Business at Northeastern University, a JD from Northeastern University School of Law, and a BA from Gordon College.

Session 2C: Let's Get Real about Donor Relations

Classroom 2, First floor

Kathleen Diemer, CFRE, Associate Vice President of Advancement Relations
George Mason University

Our work is all about others. We are the fixers, the people pleasers. We tend to everyone's needs. We make sure everyone is happy—our donors, our leadership, our colleagues. We do this job because we believe in the best of humanity, but sometimes we encounter the opposite. Sometimes our profession takes an emotional toll and can leave us exhausted and feeling spent. Part presentation, part safe space for discussion, let's talk about the aspects of donor relations that don't spark joy. How can we help our colleagues and our leadership understand the challenges we face while being there for everyone else?

About the Speaker

In her role at Mason, Kathleen Diemer oversees the donor relations, advancement communications, and gifts and records administration teams. In addition, she played a key role in helping to steer the success of the university's $500 million Faster Farther campaign.

Prior to Mason, Kathleen helped guide the University of Maryland's central donor relations unit through two comprehensive fundraising campaigns. During her tenure at Maryland, she helped design and implement the university's Celebration of Scholarships website and Online Endowment Donor Portal, which are widely recognized as the first applications of their kind. These award-winning projects set industry standards and served as models for donor relations and stewardship programs at other organizations.

Kathleen has proudly served as ADRP's secretary-treasurer and president. During her term as president, she helped strengthen association policy on partnerships and conflict of interest, and led the association through a strategic visual identity and re-branding process.

2:25–3:25 p.m. Session 3

Session 3A: DEI: Best Practices in Donor Engagement & Events

Edmond J. Safra Hall, First floor

Symone New, Director of Donor Relations & Stewardship
Planned Parenthood Federation of America

Leticia John, Director of Stewardship and Engagement
Planned Parenthood Federation of America

Alexandra Natale, Director of Individual Giving
Planned Parenthood of Greater New York

Is your leadership team still trying to diversify its donor base, or is leadership doing the work to embrace culture change in its fundraising and stewardship approach that is diverse, equitable, and inclusive? Hopefully it's the latter! Join us to learn a framework and develop an action plan to incorporate diversity, equity, and inclusion (DEI) best practices into donor engagement and special event programming.

Learning Objectives

- How to define diversity, equity, and inclusion in relation to fundraising practices and special event planning
- How to incorporate diversity, equity, and inclusion best practices into your personal goals, job description and/or role
- How to create an action plan to incorporate diversity, equity, and inclusion best practices into your department

About the Speakers

Symone New leads a small but mighty team at PPFA and focuses her efforts on creating memorable physical and virtual donor opportunities for national and affiliate principal and major gift donors. She is passionate about connecting Planned Parenthood's supporters with the organization's work and mission, while demonstrating the impact of their giving and encouraging continued support of our work. Prior to PPFA, Symone worked in higher ed, as well as at nonprofits focused on health and education. Outside of her work at Planned Parenthood, Symone is a member of the Association of Fundraising Professionals of NYC's IDEA Committee. She is also co-president of the Collective Power board of directors and works as a full-spectrum doula.

Leticia John implements PPFA's stewardship and engagement program for mid-level donors, creating contact strategies, developing impact communications, and planning events to increase donor and revenue retention. She earned a bachelor's degree from Northeastern University and her master's in public administration and nonprofit management from New York University. Leticia has over 13 years of diverse experiences with academic institutions, philanthropic consulting firms, national and international healthcare organizations, and government agencies. She enjoys developing meaningful partnerships and creating mutually beneficial solutions that promote and improve access to economic, educational, social, and health care equalities. As a fundraiser, Leticia creates narratives and unique donor experiences for nonprofits to engage and connect with philanthropists and social investors.

Alex Natale serves as a Director of Individual Giving at Planned Parenthood of Greater New York, where she connects donors to the profound work they make possible each day. Prior to this role she oversaw events and partnerships, ranging from multi-million-dollar galas to fundraising collaborations with highly sought-after brands. She is a graduate of Wheaton College in Massachusetts.

Session 3B: Taking the Leap into Your Next Venture

Classroom 1, First floor

Meghan Goff, Founder, Onword Communications
Nayeli Garcia Mowbray, Nonprofit/Donor Relations Consultant

You've heard of "The Great Resignation," but what about "The Great Evaluation"?

Two years ago, the world hit pause, and for many of us, our roles, our responsibilities—even our physical work environments—shifted. We discovered new ways to meet, collaborate, innovate, and fundraise, pushing the boundaries of what it means to be a donor relations professional. Empowered, excited, and looking to the future, many of us began to ask: "What's next?"

Explore what it means to navigate career change—between roles or industries, or as you uncover new interests; how to identify strengths and leverage them into opportunities; and how to recognize transferrable skills and the role they play in navigating "The Great Evaluation." The landscape of donor relations continues to evolve: Have you made big changes? Are you pushing the "traditional" boundaries? Are you on the fence? What's holding you back? What inspired you to make the leap? Join Meghan and Nayeli for an interactive session where they will explore topics like these, and more!

Learning Objectives

- Explore what it means to navigate career change—between roles, industries, or as you uncover new interests
- How to identify strengths and leverage them into opportunities
- How to recognize transferrable skills and the role they play in navigating "The Great Evaluation"

About the Speakers

A longtime lover of words, Meghan Goff is an advancement and development writer by trade, and now, blogger and founder of Onword Communications. After leaving her 9-5 job in higher education in 2020, Meghan launched Onword Communications to use her passion for storytelling to help even more organizations identify new and engaging ways to develop messages that resonate with their audiences. Today, her portfolio includes more than two dozen clients in higher education, health care, and the nonprofit sector. As a pandemic-era businesswoman, entrepreneur, and mother of toddlers, Meghan understands that while things rarely go as planned, there's always a great story to tell!

Nayeli Garcia Mowbray has devoted her 20+ year career to philanthropy, drawing from her experiences internationally, and from the private and government sectors. A detail-oriented and big-picture thinker, she embraces roles to make a difference—professionally and in her community. A champion for scholarships and advocate of Justice, Diversity, Equity, and Inclusion, she has worked in various nonprofit settings, including as Director of Development, to advance education, the arts, social justice, and environmental issues.

Nayeli's consulting/freelance journey began during the last economic downturn and continued when she had a baby—independent work has been a part of her career. For this most recent stint, she formed a collective of consultants who, on a monthly basis, swap experiences, provide resources, share opportunities, and discuss best practices.

Nayeli earned a Bachelor of Science in Business Administration from Towson University and has received various distinctions, including the City of Baltimore Certificate of Recognition and Presidential Certificate.

Session 3C: A Minute to Win It in the Big Apple

Classroom 2, First floor

Presented by the ADRP NYC Content Committee Host
Jillian Perrin, Major Gifts Writer, Children's Hospital of Philadelphia

Featuring Panelists
Shelley Drozd, Principal Gifts Stewardship Writer, Lehigh University
Lisa Honan, Associate Vice President for Advancement Operations, University of New Haven
Amy Massimo, Director of Donor Relations, Hackensack Meridian Health Foundation
Barbara Mlawer, Director of Stewardship, NYU Langone Health
Casey Sharkey, Director of Donor Relations and Principal Gift Stewardship, Lehigh University

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.

Learning Objectives

- Learn best practices in donor stewardship, particularly individual and customized actions
- Skill-building in recognition, impact reporting, and more!
- Step-by-step tips on how to make a donor experience truly surprise and delight

3:30–4:30 p.m. Raffle Giveaways, Wrap-up, Vendor Time, and Afternoon Snack

Events Hall, Second floor

Enjoy a bite to eat while you network and visit sponsors in the Events Hall!

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www.pdgdesign.net

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EXHIBITORS

Mythos streamlines the process of collecting and sharing personal stories and relevant communications with your audience in print or digital form. Mythos integrates all the tools you need into one platform from content collection and management to publishing and sharing to help you produce beautiful, personalized, and highly relevant reports and other communications. One at a time or hundreds at a time and in print or digital form.

www.communitymythos.com

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