Second Annual ADRP NYC Regional Conference

Session Descriptions

Keynote Plenary – 9:45-10:45 a.m.

A Paradigm Shift: Next Practices
Lynne Wester, Director of Stewardship and Donor Recognition, Yeshiva University

The field of donor relations is experiencing a revolution unlike any seen before. Communications are no longer segmented, stark, and costly mailings; now we are looking to create rich, bold, all-encompassing communications that grab and engage donors and prospects. The real value of this new paradigm, however, is in the genuine, authentic conversation that exists. What sets the high-achieving shop apart is its ability to take calculated risks, embrace failure, and innovate. Let’s walk through this changing landscape together and learn how to move forward and inspire others to join our mission of innovation and the future of the next best practice.

Session 1 – 10:55-11:55 a.m.

1-A Lifecycle of a Gift
Karen Hurst, Manager Gift Processing and Alumni Records, Rutgers University
Nicole Farella, Asst. Director of Stewardship, Rutgers University

This presentation will discuss the full lifecycle of processing a gift through the advancement services process. Beginning with the acceptance of the gift by the development officer and development of a fund agreement with the donor, we will then follow the check through accounting, gift processing, receipting, gift acknowledging and stewardship. Functions performed by development officers, accounting, data entry, and donor relations will all be covered. Rutgers University Foundation processes over 100,000 gift transactions per year for over 30,000 donors. This presentation will provide an overview of a large advancement services organization and would be helpful for: those new to development or advancement services; development officers; those in smaller or similar advancement services organizations who would like to learn more about the business process and automation; and members of other university departments and/or Information Technology who would like to learn more about advancement. This session is based on a monthly class presented by Rutgers University Foundation to our new development officers.

1-B Stewardship at the Top of the Pyramid: Tailoring Our Efforts to Individual Donors
Dan Baker, University Donor Relations for Principal Gifts, Columbia University
Kate Jankowski, Director of Stewardship and Donor Relations, Albany Medical Center
Michael J. Smith, Associate Director of Membership, American Museum of Natural History

As the disciplines of stewardship of donor relations have matured, most organizations have become adept at the systematic aspects of caring for our donors through events, thank you gifts, and narrative and financial reports on scholarships, program funds, professorships, etc. But how well are we doing when it comes to relating to our most generous donors as individuals, not as members of donor societies or giving-level cohorts? Recognizing the growing need for
exploration of this emerging aspect of our work, a panel will present experiences and case histories, as well as recommendations for developing programs in this area. A lively discussion is expected; audience participation will be encouraged.

1-C  Savvy Socializing: How to Benefit Your Institution and Yourself  
Merrilyn Lewis, Director of Donor Relations, Smith College

Developing and honing skills that will make you a better conversationalist and donor relations professional can be fun! Gain helpful hints on initiating conversations, joining ongoing discussions, leaving/extracting yourself from a conversation. This interactive session will have you feeling even more comfortable as you schmooze with your constituents, donors, and colleagues.

Lunch – 12:00-1:00 p.m.

Session 2 – 1:00-2:00 p.m.

2-A  Effective Donor Relations: A Crossroads between Stewardship & Technology  
Mary Carole Starke, Assoc. VP for Operations and Assoc. Campaign Director, Vassar College  
Perry Liberty, Assoc. Director of Donor Relations, Vassar College

Explore how one College uses technology to manage stewardship priorities from efficient standardized acknowledgments to highly personalized and customizable reports. We’ll share our practices concerning management of acknowledgments, scholarships and endowment reporting, and our efforts to compile an inventory of recognition, all using a variety of both web-based and Windows-based applications. We hope this will lead to a discussion of trends in our profession and the sharing of ideas from attendees.

2-B  The Big C  
Mary Solomons, Director of Donor Relations, Skidmore College  
Barbara Casey, Assoc. Director of Donor Relations and Director of Presidential Outreach, Skidmore College

Put on your hospital gown and prepare to examine the four stages of The Big C, aka a Capital Campaign. Planning, Silent, Public, and Post…is there ever a time that an advancement office isn’t in campaign mode? This session will focus on events for each stage, including intimate donor identification programs, creative groundbreaking celebrations, and kick-off and conclusion events that won’t break the bank. Expect your Donor Relations Department to make a full recovery!
2-C  How’s my driving? Call 1-800-FEEDBACK
Erin Moyer, Executive Director of Stewardship and Gift and Donor Services, University of Rochester

An overview on customer feedback collection methods, surveys and the million-plus ways to evaluate your program – which one is right for you? A presentation on programs, customer evaluation methods, and the pitfalls and hurdles of implementation.

Session 3 – 2:10-3:10 p.m.

3-A  Pledge Reminders as Stewardship Tools
Gail Ferris, Director Technology and Information Services, American University

Do your donors feel as if they get all the personal touch of a credit card bill when they get your pledge reminders, or are they made to feel good about their commitment to your institution? This session explores ways in which pledge reminders can be the first steps in cultivating the next gift.

3-B  Inspired Stewardship: How to Mobilize the Message of Gratitude and Create a Community of Stewardship Ambassadors
Jessica Perlman, Asst. Director, Stewardship and Donor Communications, Georgetown University

This workshop will give Donor Relations professionals a glimpse into the newly launched student stewardship initiative at Georgetown - the Georgetown Gratitude Ambassadors (GGA). Working with colleagues from the Office of Student Financial Services, we have reinvigorated an outlet for students to express their thanks to some of the university’s largest donors. Learn about fresh approaches to relaying the message of gratitude by incorporating the beneficiaries of philanthropy to most effectively and genuinely thank your donors. This workshop will include a brief presentation of new methods being used at Georgetown, and conclude with a discussion of current best practices and a brainstorming session.

3-C  Putting a Donor’s Name in Lights
Beth Rowan, Senior Director of Development for Stewardship, NYU Langone Medical Center

Campus transformation and the age-old problems connected with old buildings coming down, new buildings going up. How do we recognize donors for their past generosity while giving gift officers an opportunity to open a giving conversation with past donors/new heirs? It all starts with a campus-wide audit, a naming policy and appropriate gift agreement language to eliminate future headaches, and segues quickly into new donor signage, real estate’s time-tried mantra “location, location, location,” other recognition opportunities besides signage, and what about those digital donor boards? Who has them and how they are working? Find out as you and your colleagues share donor signage past mishaps and future visions.