DEVELOPMENT: ANNUAL GIVING, CAMPAIGNS, AND MAJOR GIFTS

This track is generously sponsored by:

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Track Session I

WOMEN AND PHILANTHROPY

Thursday, February 23, 10:45 a.m. – 12:00 p.m.

One of the most important changes in philanthropy during the past 20 years has been the emergence of women as donors. If you are interested in providing your alumnae with a highly focused and interactive experience, a giving circle may be an ideal way to bring a new dimension and additional support to your advancement program. This session looks at some ways to meaningfully engage women in private philanthropic support, and examines some successful organizational models.

Speaker: Sandy Edwards, Associate Vice Chancellor, University of Arkansas

Track Session II-A

MORE INNOVATIONS IN ANNUAL GIVING

Thursday, February 23, 1:45 – 3:00 p.m.

There is no standard formula for making an annual giving program work. Find out how to kick-start your annual giving program by hearing from annual giving expert and author Bob Burdenski who will share insights from a brand new book published with CASE, More Innovations in Annual Giving. Going beyond the story to explore why and how great programs work, Bob will highlight some of his favorite examples from the book and offer advice for all institutions on making an effective annual giving case for support.

Speaker: Bob Burdinski, Partner, Burdenski Taylor Consulting Group

Track Session II-B

FOUNDATION/CORPORATE RELATIONS AS MAJOR GIFTS: A COURTSHIP MODEL

Thursday, February 23, 1:45 – 3:00 p.m.

Often viewed as a “behind the scenes” role, the foundation/corporate relations professional can actually be a key player on the major gifts team. The written proposal is just a finite step in an ongoing cycle of opportunities to build relationships with people who make granting decisions – relationships that can pay off with funding that extends far into the future. This interactive session explores how ensuring that foundation/corporate relations professionals have a seat at the major gifts table enhances long-term relationships, not only with grant-maker organizations, but also with their decision makers – typically prospects in their own right.

Speaker: Ellen Bussing, Senior Director of Major Gifts, Willamette University

Track Session III

MISSION-BASED FUND-RAISING: A NEW APPROACH TO MEETING YOUR PRIORITIES

Thursday, February 23, 3:30 – 4:45 p.m.

In an age of increasing fundraising expectations, development officers are challenged to continue raising money for institutional priorities and responding to donor needs on a sustainable basis. Learn how one university has met the challenge by creating a new approach to raising funds for their institution.

Speaker: L. Clark Warren, Associate Vice President for Development, University of British Columbia

Track Session IV-A

DISTRICT VIII’S BEST PRACTICES IN ANNUAL GIVING

Friday, February 24, 9:45 – 11:00 a.m.

Our district is doing some amazing work in the area of annual giving. Come hear a panel of representatives from District VIII and learn how to start or enhance your senior class gift program, new strategies surrounding retention and monthly giving to increase the lifetime value of your donors, and how to leverage corporate matching gifts through alumni volunteers. District VIII has it all!

Moderator: Polly Blasko, Director of College Advancement, Lewis & Clark State College • Panelists: Jane Potentier-Neal, CFRE, Manager of Annual Giving, University of Alberta; Dori Sonntag, Associate Director for Annual Giving, Gonzaga University; Helen Tanaka, Assistant Director for the Whitman Fund, Whitman College

Track Session IV-B

FAMILY WEALTH PRESERVATION AND FAMILY DYNAMICS

Friday, February 24, 9:45 – 11:00 a.m.

Join Tom Rogerson of Mellon's Private Wealth Management group in a discussion that will help development officers answer common questions often asked by potential planned giving donors. Learn how to showcase unique strategies to help ensure that the personal wealth of your donors is transferred when and how they choose. And, leave knowing the common estate planning mistakes and how to help your donors integrate planning and investing to maximize returns and minimize tax liability. Rogerson, a sought-after speaker on planned giving strategies and fundraising techniques, regularly speaks to wealthy individuals, business owners, university boards, hospitals, and charitable organizations throughout the country, including Harvard University and Yale University. This is your opportunity to learn from one of the best.

Speaker: Tom Rogerson, Senior Director, Mellon

Track Session V

BUILDING THE CULTURE OF PHILANTHROPY WITHIN YOUR COLLEGE

Friday, February 24, 1:15 – 2:30 p.m.

No senior leadership in your fund raising mix? Faculty in a quandary over the difference between annual and major gifts? This session will teach you proven strategies for re-shaping the fund raising culture in your college and help you identify ways to engage and motivate institutional leaders to take up the advancement reins. You will also learn tried and true methods for recruiting Board Members and educating faculty on the ins and outs of fund raising. This is your opportunity to learn from one of the best.

Speaker: KCI (Ketchum Canada Inc.)