

Wednesday, July 30

Registration

10 a.m.-2 p.m.

Ballroom Foyer

Newcomer Orientation Lunch

Noon-1:45 p.m.

Mainsail

What exactly is ICAA? Come and learn more about the organization and get to know others in your field. This session is open to professionals new to advancement, new to ICAA and to old hands who want to offer a welcome.

sponsored by Pursuant Group

Opening General Session: 41 Years of Lessons Learned

Gene Haberman

2-3:10 p.m.

Bald Eagle

The opening presentation will be one that you will not want to miss as one of ICAA's long-time members takes a stroll down memory lane reminding us all of where we started and why our history is important. He'll share with us the good, the bad and the unforgettable lessons of university advancement today. And while the old Latin proverb goes, "Nothing is certain except the past," he'll help us see where the future of alumni, development and public relations might take us in the future.

Ashland University hired **Gene Haberman** in 2001 to run its most ambitious capital campaign to date. The Building on Strength Campaign concluded in 2004 and surpassed the \$55 million goal by \$4.4 million. The university is currently in a campaign to raise \$10 million for a new College of Education and has raised \$8 million to date. Haberman, a 1962 graduate of Wittenberg University, began his extensive career in fundraising for higher education in 1967. He has served at Wittenberg, Albion College, Olivet College, West Virginia University Foundation and the University of Toledo, where he was instrumental in the creation of the independent foundation (UTF).

Concurrent session I

3:15-4:10 p.m.

Expressing Thanks:

Student Development Meets Donor Development

Debbie Sprang

White Egret

Are you seeking new and creative ways to increase the number of students sending thank you letters to their scholarship donors? Hosting a thank you letter writing party at your college or university will help you achieve this goal. This session will equip you with ideas for hosting an energized event, using Baldwin-Wallace College's annual Thankathon as a model. Session participants will receive a student thank-you letter party planning guide, as well as share success stories, suggestions, ideas and questions about how to strengthen the relationship between donors, student recipients and the institution.

At Baldwin-Wallace College since 2000, **Debbie Sprang** has served as associate director of Career Services, academic advisor for evening/weekend students, a member of the advancement team and as assistant to the senior vice president. Debbie earned her bachelor's degree from Baldwin-Wallace and her master's from The Ohio State University.

Trends to Corporate Philanthropy

Jeff Wolf

Starboard

This session will focus on national and state corporate giving trends and the impact on higher ed. Discussion of successful corporate solicitation and donor retention strategies will be covered.

Jeff Wolf is president of the Ohio Foundation of Independent Colleges. He has 24 years of fund raising experience. Wolf received his bachelor's from Bowling Green State University and M.S.M from Mount Vernon Nazarene University. He has been active with The Foundation of Independent Higher Education serving as a board member, regional representative and chairing the organization's strategic planning process.

Technology for Traveling Fundraisers

Josh Smith

Tern

This session will cover many different pieces of technology which will aid frequent travelers. Devices will range from mobile phone options, GPS, laptops and software. Attendees should have a better understanding of the options available to aid their fundraising on the road. There will be time for questions.

Josh Smith is the advancement services manager at Bluffton University as well as a member of Smartphone and Pocket PC Magazine board of experts. Smith earned his bachelor's from Bluffton University.

Major Gift Metrics

Mike Ferin

Navigator

Explore ways to apply large school major gift metrics to a smaller, private school program.

Mike Ferin enjoyed a 40-year career in higher education advancement serving as vice president for six institutions including Wittenberg University, Siena Heights University and the University of Indianapolis. The 2005 recipient of the Ernie K. Sheetz Mentor award, Mike is now retired and enjoying a second career in private consulting.

The Human Resources Life Preserver

Andrea Sprouse

Blue Heron

In today's environment the most costly business expense centers around human capital. There is the initial investment of the recruiting and hiring process, but then if you make the wrong decision there are added expenses and risks. This session will help you navigate through some of the most prevalent issues and give you some specific tips and tools, such as basic interview and hiring tips, as well as direction in maintaining the best staff possible, with a few ideas on how to throw a person overboard if necessary.

Andrea Sprouse is a human resource consultant for Downstream Operations at Marathon Petroleum Company in Findlay, Ohio. She provides human resources support to refining engineering and

transportation engineering groups, and supports the diversity organization as a trainer. Andrea received both her master's in industrial and labor relations and her bachelor's degree from West Virginia University.

Social Networking and Alumni Relations:

Leveraging the Power of the Web for Building Long-Term Alumni and Donor Relationships

Jeff James

Bald Eagle

The growth of social networking sites such as MySpace, Facebook and LinkedIn have taken the Internet by storm. What role should these "Web 2.0" tools take in your relationship development initiatives? This session will outline the basics of social networking and put them in strategic context for colleges struggling to make the most of this opportunity. Should a school manage their own social network or participate in an existing site? How does a social network relate to your main Web site? How should schools respond to negative rumors and unflattering news being discussed on social networks? How does one build an effective social network that is "sticky" enough for alumni to join?

Jeff James is the CEO and founder of Mythology LLC, a marketing management and growth strategy consulting practice. Prior to starting Mythology, Jeff held numerous sales and marketing management roles during his 14 years at Microsoft Corporation, including working with academic customers in higher education and K12. Jeff holds bachelor's and master's degrees from West Virginia University.

Break

4:15-4:30 p.m.

Ballroom Foyer

sponsored by Orion Strategies

Concurrent session II

4:30-5:25 p.m.

Student Ambassador Groups: Getting Started

Joe Borowski

Blue Heron

Those of us with Student Ambassador Groups understand the power of their volunteerism at major events and the influence on donors that they have at private dinners, but how do you get started? Let's take a look at what works, what doesn't and how to manage student volunteers.

Joe Borowski was a student ambassador at Kent State University as an undergraduate student. Today at Baldwin-Wallace College, Joe serves as assistant director of alumni and has started an alumni chapter program in addition to starting the student ambassador group.

The Fiscally Responsible Fundraiser:

How to Close the Gift Without all the Hoopla

Julie Pontasch & Jim Beaverson

White Egret

With our institution's budget cuts, it is our responsibility to make the most of every dollar. This session will help you feel more comfortable making that initial call and closing gifts with the least number of personal visits and provide strategies to continue a meaningful relationship for future gifts. Save your institution valuable resources

that can be spent on your students and programs and gain renewed respect from your administration for your fiscal prudence.

Julie Pontasch is the director of gift planning at Bowling Green State University where she obtained her bachelor's degree. She has been a development professional for 20 years and is vice-president for the Toledo Area Planned Giving Council, a member of the Toledo Estate Planning Council and NCPG. **Jim Beaverson** has more than 18 years of business development and philanthropic gift facilitation experience. He began his higher education development work at his alma mater, Defiance College. He has served Bowling Green State University since 2005 as administrative director and assistant director of gift planning.

Advancement Services: Doing it All in the Small Shop

Dave Smittle

Starboard

Does the path to your desk resemble the ticket window at Grand Central Station? Welcome to an advancement services small shop! This session will provide time-saving tips, advice for professional association, technology suggestions and shortcuts to help with various common tasks, as well as, a venue to share opinions and advice with others.

David T. Smittle, director of advancement services at Ohio Northern University, has been a member of ONU's advancement staff since 1987. He is responsible for data processing, special projects, office management and is a development officer. Dave implemented SunGard Higher Education's Banner administrative database software package in 1989-90 and has presented sessions for more than 16 years at Banner user's group conferences.

From Data to Information to News: Getting the Most

Out of Your Campus Institutional Research Base

Robert Burke

Tern

Your college or university is sitting on a treasure chest of potential news in its institutional database, but it's guarded by someone who may not know how newsworthy it is. Bob Burke is a rare "data guy" who also is an experienced PR hand – he was director of communications for the city of Boston's 350th anniversary and was the city's media liaison for the Pope's visit in 1979 – and here he offers a guide to what your institutional research colleagues know and how to make it into the paper.

Bob Burke, director of research for the Association of Independent Colleges and Universities of Ohio, has directed the organization's research program since 1996. He represents the association on several statewide commissions and serves as state 'intermediate' coordinator for private colleges with the National Center for Education Statistics. Bob has spoken at state and national higher education association research meetings.

Otterbein's Variable Campaign Proposals:

Leveraging Strategy One Investor at a Time

Donna Burtch & Joe Neal

Navigator

Otterbein College is expanding its science facility. With a total project cost of \$20 million, the college needed to develop compelling content to share with 150 major donor prospects. The solution? A customized individualized approach that integrates a highly personalized mini-case statement based on each prospect's

area of interest and a detailed proposal specific to the prospect. We will share our adventures in creating this collaborative, productive approach.

Donna J. Burtch joined the Otterbein development staff in 2007 and currently serves as interim vice president for the division of institutional advancement. Donna has 25 years of experience in fund development, consulting and marketing. She holds a bachelor's degree from Ohio Wesleyan University and a master's degree from The Methodist Theological School. **Joseph A. Neal** is assistant director of development at Otterbein where his primary focus is on the \$20M science campaign. He is beginning his ninth year in fund development. Joe holds a bachelor's degree from Wright State University.

Reception/Dinner Buffet/Big Swap

6:30-9:15 p.m.

Tern

Network with colleagues prior to the dinner buffet beginning at 7 p.m. Don't forget to bring your 'Big Swap' item to dinner! Enjoy your chance to exchange logoed items with your colleagues and friends at the 9 p.m. drawing.

sponsored by Mythology Marketing

Hospitality Suite

9:30-? p.m.

Room 315

Network, maybe play a little cornhole and wind down from the full day.

sponsored by Liberty Mutual

Thursday, July 31

Breakfast Roundtables

7:30 a.m.

Bald Eagle

Collaborate with colleagues, ask questions, share your thoughts and enjoy breakfast. Be sure to suggest discussion topics on the message board near the registration table beforehand.

sponsored by RuffaloCODY

General Session:

Hey, Did You Read the One About...?

Donna Boen

8:15-9:10 a.m.

Bald Eagle

We've all done it. We've all read an article so intriguing or entertaining that we just had to tell our mother, brother, and friends about it — in excruciating detail. So how do we turn our schools' messages into material that will have our alumni sharing it with others and coming back for more?

The editor of *Miamian*, Miami University's alumni magazine, **Donna Boen** doesn't pretend to have all the answers. But through the years, she's heard from readers what they like and which articles went straight from the mailbox to the bird cage. Donna has a bachelor's and master's degrees from Miami University. She started her career at the Columbus Citizen-Journal before returning to her alma mater as assistant director of the news bureau. She's been editor of *Miamian* since 1991.

Concurrent session III

9:15-10:10 a.m.

Accent on Women

Margaret Pomfret

Bald Eagle

In the next 10 years, studies show that women are expected to own half of the wealth in the U.S. How can our colleges and universities involve women in philanthropy, engage our successful alumnae and create lasting relationships? These questions, among others, will be the focus of this session as we look at the Ashland University program, "Accent on Women," which seeks to celebrate our female philanthropists and engage our alumnae.

Margaret Pomfret is the director of alumni and parent relations at Ashland University where she is responsible for working with the AU Alumni Association Board of Directors, AU Parents Association Executive Committee and the Heritage Club for retired faculty and staff. Margaret has worked with the university to engage and support its alumni through expanded marketing and outreach programs.

Leading Where it Counts

Danny Nicholson

Blue Heron

This research/presentation, which won the 2007 Grezebach Award for Educational Research from CASE International, will review the leadership characteristics and behaviors of four highly successful fundraising college/university presidents. During a two year study, nine leadership attributes emerged. This session will discuss how these attributes can be implemented to help participants become successful leaders and academic fundraising professionals. This presentation is designed for every professional level - from presidents and alumni directors to annual fund directors and major gift officers.

William D. Nicholson II ("Danny") most recently served at Coastal Carolina University as vice president for university advancement. Danny started his career in 1984 in annual fund, alumni affairs and athletic fundraising and has worked in development for 23 years. During his career in higher education, he has either led or played a key leadership role in securing major gifts in campaigns totaling over 100 million dollars. As a speaker, he has spoken at CASE District III on topics including annual fund, corporate and foundation relations and major gifts.

How Your Graduates Can Help You:

Alumni Surveys from a Practitioner's Point of View

Ron Uroda

Bald Eagle

This presentation will provide basic information on developing and using alumni surveys for advancement purposes. The topics to be covered include the benefits of alumni surveys, developing a questionnaire, promoting the survey among alumni, working with other offices on campus and using the results. Lessons learned from a recent multi-institution alumni survey will also be discussed.

Ron Uroda is the vice president for research at the Association of Independent Colleges and Universities of Pennsylvania. In this position, he is responsible for various research projects relating to higher education in Pennsylvania. In 2005 he managed the collection and analysis of data for an alumni survey involving 46 independent colleges and universities and is preparing to undertake a similar study in 2010.

The Best Donors are those Already in the Room :

Stewardship for Major Gift Donors

Paul Daugherty

White Egret

This session presents a first hand perspective of stewardship of major gift donors to the next stage of cultivation. A donor's first gift is more than likely never their last and this session will provide ideas, concepts and examples of what has and has not worked to effectively steward donors to cultivate a life-long relationship. Join this session for an interactive discussion on building a culture of philanthropy within your major gift program.

Paul Daugherty is director of development for major gifts at the West Virginia University Eye Institute/WVU School of Medicine. He previously served as executive director of the WVU at Parkersburg Foundation, Inc., and director of development for West Virginia University at Parkersburg. He is a graduate of West Virginia Wesleyan College and serves as president of Leave A Legacy® of Greater West Virginia and spokesperson for Generation West Virginia.

Overcoming Obstacles in Phonathons

Heather Albrecht

Starboard

During this interactive session, we will discuss specific issues surrounding today's phonathon programs. How have things such as Caller ID, the national "Do Not Call List" and preference of cell phones affected our programs? Has the current economic status really affected giving and what are we doing about it? These topics, among others, will be our focus. Audience participation and problem solving exercises will be strongly encouraged.

Heather Albrecht, vice-president non-profit services for RuffaloCODY, has 12 years of development and annual giving experience within the non-profit sector. Heather started her career working with phone, mail and development communications at Northern Michigan University and later served as director of the call center at UCLA. She is a member of the Association of Fundraising Professionals and Annual Giving Professional Network and has been recognized as a "stellar speaker" by CASE.

Internet Fundraising: Augmenting Mail & Phone Programs with an Integrated Online Approach

Jason Mitchell

Tern

The Internet should no longer be considered simply a direct response strategy, but as part of a multi-channel approach that not only finds new and younger donors, but can boost other traditional fundraising channels. Learn how customized integrated online solutions can lift all aspects of fundraising and communications at your institution.

Jason Mitchell serves as chief marketing officer for Pursuant, a full service online fundraising agency. Jason has been instrumental in growing Pursuant's client base from one university client in 2005 to more than 100 in 2008. Jason is a sought after speaker on issues regarding Internet fundraising, multi-channeling fundraising and Web 2.0.

Break

10:15-10:30 a.m.

Ballroom Foyer

sponsored by Recognition Awards

Concurrent session IV

10:30-11:25 a.m.

Case Studies in Planned Giving

Tom Konkoly & Mike Walczak Navigator

At this session, Tom and Mike will share case studies in planned giving to examine motivations, solicitations and stewardship and how they all play a significant role in a successful gift cycle. Audience members will be encouraged to share stories from the field.

Tom Konkoly '68 is director of development, gift planning, and **Mike Walczak** is director of trusts and estates at Baldwin-Wallace College.

Automation - The Latest Phonathon Trend

for Independent Colleges

Panel discussion Bald Eagle

A panel of staff members from ICAA member institutions will discuss their experience with automation web or software-based automated programs (DialVision, Campus Call and SmartCall). There will be time for a question and answer session.

Panel members:

Jeff Alix, Ashland University coordinator of annual giving

Lori Pongtana, Denison University assistant director of annual fund

Dacy Wilcox, Ohio Northern University
associate director of annual giving

John Templeman, Baldwin-Wallace College assistant director of annual giving and director of annual fund
by phone

Prospecting in your Database:

Using Data to Help your Fundraising Evolve

Sally Boucher Starboard

Is your database a "primordial soup" of suspects, prospects, alumni, donors and friends? Do you ever wonder which constituents are your best major gift prospects, which should be receiving your planned giving messages and who might be the next leadership donor to your annual fund? This workshop will show you how to breathe life into your fundraising programs by using data to enhance your understanding of your constituencies. We'll discuss how traditional research, electronic screening and analytics can help your fundraising programs evolve to the next level.

Sally Boucher joined the client services and training team at WealthEngine in 2007. Prior to joining WealthEngine, she was director of development for the College of Education at James Madison University in Harrisonburg, Va. Her experience in non-profit fundraising includes annual fund, foundation giving, planned giving, endowment fundraising, major gifts and capital campaigns.

Using a Development Audit to the Greatest Advantage

Kris Kindelsperger & Tanya Shelton Blue Heron

Many colleges are finding that a development audit can be used effectively to address a wide range of development office and institutional issues. Beyond the expected benefits of evaluating your development program, learn ways to use the audit to address broader issues with your president, senior administrators, board of trustees, alumni association and others. Hear case study perspectives of an advancement consultant and a vice president for development.

Kris W. Kindelsperger, Ed.D., is a senior executive consultant at Johnson, Grossnickle and Associates, a full service advancement consulting firm in Indianapolis, Ind. Before joining JGA, he served as vice president for development at Hanover College. **Tanya Shelton** has been vice president for institutional advancement at West Virginia Wesleyan College since 2007. Prior to coming to WVWC, she was vice president of advancement at Alderson-Broaddus College and had served as assistant director of development and director of planned giving. She is a past president of the West Virginia Chapter of the Association of Fundraising Professionals.

Marketing to Attract Donor Investment

John Goettler

White Egret

As competition for a limited number of philanthropic dollars grows more intense, the success of your institutional advancement program depends on your ability to apply both new and tested marketing dynamics to your situation. Simply being “for the social good” is no longer good enough. The seven major steps involved in the process of marketing for the educational marketplace are essential to overcoming the challenges of raising funds. The successful institution will be the one marketed first in terms of the opportunities it offers the donor constituency—rather than the institution’s needs.

John Goettler, president of Goettler Associates, has extensive experience in many areas of fund raising, including conducting feasibility studies, consulting on capital and annual fund-raising programs, enlisting and training volunteer leaders and the organization and management of major fund-raising programs.

General Session:

How to Handle the Hard Calls: Six Success Tips

for Dealing with a Media Crisis

Suzanne Wilcox English

11:30 a.m.-12:25 p.m.

Bald Eagle

You never know when a crisis will arise — but you can be pretty sure you will have to handle a crisis at some point. What can you do to prepare for that day? Basic steps you can take today will help give you a framework for how to proceed and first steps to take when it’s your turn at the media microphone.

Suzanne Wilcox English serves as director of public information at The University of Findlay, where she joined the team in February 2006. She previously served as director of media relations and executive-in-charge of public relations at St. Bonaventure University in Western New York, where she assisted the university in dealing with a national PR crisis as part of an award-winning team response.

Lunch

12:30-1:30 p.m.

Lounge

sponsored by Pursuant Group

Recreation

1:30-6 p.m.

In addition to professional development sessions, ICAA also provides networking opportunities, such as recreation and social time on Thursday afternoon. Sign up for your choice at the registration table. Some of the activities include golf, massages, water aerobics, sand volleyball and more.

Golden Anniversary Celebration/Awards Banquet

Keynote address by Ken Sheetz

Reception 6:30-7 p.m.

Bald Eagle

Banquet 7-? p.m.

The banquet will include a three-course served meal with live music, a champagne toast and cash bar. Business attire is suggested.

Ken Sheetz, chief development officer at Christel House International, has 19 years of experience in development and fundraising, with significant success in major gifts and campaigns. He served in similar posts for University of Indianapolis, Wittenberg University, the Ohio Foundation of Independent Colleges and his alma mater Muskingum College. He holds a MBA from Ohio University and is a past ICAA president and summer conference chairman.

sponsored by Goettler Associates

Friday, August 1

Breakfast & Stories from the Field

8:15 a.m.

Bald Eagle

Start your day with humorous examples from ICAA colleagues of how we all must be ready for the unexpected and ready to turn a bad situation into something good. Moderated by Kathy Milam, Wilmington College.

sponsored by Wealth Engine

Presidential Address:

The Future of Fundraising:

Working Together to Make a Difference

Dr. Pamela Balch

9-9:45 a.m.

Bald Eagle

President Pamela Balch of West Virginia Wesleyan College will offer some presidential insight and words of wisdom for advancement professionals.

Dr. Pamela Balch received her bachelor's degree from WVWC and her masters and doctoral degrees from West Virginia University. She previously served at colleges and universities in West Virginia, North Dakota and California as president, vice president for academic affairs and dean of the faculty, vice provost for academic planning, associate dean for academic affairs, director of teacher education and director of graduate programs in teacher education.

sponsored by Johnson, Grossnickle and Associates, Inc.

General Session:

A Philanthropist's Perspective

Dr. Lucille Ford

9:45- 10:35 a.m.

Bald Eagle

This interactive session will serve as a capstone to the conference, leaving you re-energized, enthusiastic and ready to take your institution to the next level.

A university educator, author and administrator, nationally known economist and lecturer, political activist and community leader, **Dr. Lucille G. Ford** is perhaps known as a trailblazer. In an age when only 77,000 women graduated from college, Dr. Ford graduated from Stephen's College and went on to earn a bachelor's degree and an MBA degree from Northwestern University. She earned a Ph.D. in economics from Case Western Reserve University. Dr. Ford came to Ashland University in 1967 as a professor of economics and later served as vice president of academic affairs and provost. Following her retirement, she founded the Ashland County Community Foundation serving as its president. In 2001, Dr. Ford was awarded Northeast Ohio Association of Fundraising Professionals Outstanding Fundraiser Award.

Conference Wrap-up

10:45 a.m.

Bald Eagle

Learn more about future ICAA events, including dates and location for next year's summer conference. Find out who wins the big door prize (must be present to win).

Hotel check-out and depart

11:30 a.m.