

INDEPENDENT COLLEGE ADVANCEMENT ASSOCIATES

2009 Annual Fund Mini-conference Update

April 6-7, 2009

Joanne Lally Eberhart, CFRE, Senior Consultant

Ketchum/Pursuant

A seasoned development and advancement administrator and consultant, Joanne will share her perspectives for the future of the fundraising workhorse- The Annual Fund- and what can be done to energize your's. Integrating all elements of the quiver of fundraising tools- phonathon, direct mail, personal contacts and e-communication- Joanne will challenge 'the way we always did it' to be done in an integrated fashion that meets the expectations of today's donors. Having served as head advancement officer on bustling campuses and as a consultant to many national charities and institutions of higher learning, Joanne' strategies express innovation based upon tradition, integrating and examining the function of each element of the fundraising process for greater efficiency and goal attainment.

Jeff Flick, Principal

BD&E/USA

What do Alcoa, Children's Hospital of Pittsburgh, Equitable Resources Pittsburgh, Federated Investors, PNC Financial Services and H.J.Heinz have in common with Bethany College, Carnegie Mellon University, Robert Morris University, and Park University? BD&E/USA!

These BDE clients are successfully reinventing or developing a brand which looks to the future with imagination, but is grounded in the core values and past success of these institutions. Our communications and external impressions- they enhance perception and brand performance, to recruit, and retain, students and sell image- shouldn't they also attract stakeholders and partners in mission? Jeff will demonstrate how to easily build consensus which invites engagement across generations and affinities.

Debbie Lazorik, Interim Director of the Marietta Fund/Special Assistant to the Vice President

Marietta College

Discriminating donors of today find fulfillment in their philanthropy if they can 'make a difference.' Today's donors will respond to appeals about things they are passionate. Strategic segmentation and affinity marketing in engagement and fundraising might result in new success for us. Having spent her career in higher education athletics coaching, administration and most recently engagement and fundraising, Debbie will share with us ideas for increasing participation among members of this institutional alumni segment.

Robert P. Kirschner, Director For Annual Giving

John Carroll University

Voted as the 2008 Best CASE V Program in Annual Giving, Bob Kirschner will demonstrate the success of email solicitation to non-donors.

Using this new form of solicitation, campaign goals were to increase participation among non-donors, to educate non-donors to the importance of annual support, and to thank those who financially reengaged with JCU.

Would you like to learn how to raise money for almost nothing?

Follow the analysis Bob used to consider the possibilities, the problems, the outcomes and the consequences of using email as a new solicitation strategy. How deep is your email prospect pool?

Susan John

United States Postal Service

The tactical aspects of direct mail might be known by your Advancement Services group. But the strategic side- which lives in design and copy writing or communications- might not be as familiar with what works to enhance campaign efficiency and ROE. A working knowledge of postal services regulations and direct mail savvy can optimize your direct mail efforts. How big? how often? how interesting? how expensive? to whom? Neither rain, nor snow, nor dark of night should keep our annual fund mailings from their appointed rounds. Let Susan tell us how!

Jason Fisher, Senior Counsel

Advancement Solutions, RuffaloCody

Author of the CASE book "The Phonathon Manager's Planning Handbook", Jason Fisher will tell us about the top FIVE Phonathon mistakes and how to correct them. Jason brings to us almost 20 years of administrative and consulting experience in direct marketing and higher education fundraising. The Phonathon is an important engagement tool. Shouldn't you see how to make your's a model of phonathon success?

Hub Burton, Associate Vice President, Alumni and College Relations

Ann Foraker, Assistant Director of Alumni Events and Services

Marietta College

Like the Dynamic Duo of Alumni Relations, Hub Burton and Ann Foraker will bring to us their years of experience in communications, marketing, public relations and event planning which, when combined resulted in Marietta College's "Golden Pioneers Reunion Weekend" Program, the 2008 CASE V "Best New Alumni Program Award. This duo's bag of tricks includes outreach campaigns to alumni, prospective students, the media and community audiences, using print, web, radio and television, sports networks and broadcasts, media relations and satellite communications. Their common sense approach to engaging multiple constituencies diversifies Marietta's base of support.