

# 2007 ICAA Summer Conference Schedule

## Wednesday, July 25

### 10 a.m.-2 p.m. **Registration**

Stop here first to pick up your goodies.

### 1-2 p.m. **Newcomer orientation**

What exactly is ICAA? Come and learn more. This session is open to professionals new to advancement, new to ICAA and to old hands who want to offer a word of welcome.

### 2-4 p.m. **Welcome and general session**

#### **Forward Thinking**

*Eric Lutzo, principal, Forward Thought*

Forward Thinkers are collaborative leaders in all areas of business that realize small changes in compassion, acceptability, responsibility and empathy will not only have a great impact on their organization's bottom line, but more importantly affect those people who make up the organization and create its success. This program will weave in Emotional Intelligence theory as well as client experiences from both a coaching and certifying perspective. It will be interactive. Participants will draw on their own experiences and reflect on possibilities. They will engage each other around Forward Thinking principals and set a tone of learning for the rest of the conference.

### 4-4:15 p.m. **Break**

### 4:15-5:15 p.m. **Concurrent sessions I**

#### **Creating Alumni Chapters**

*Tim Channell, director of alumni relations, West Virginia Wesleyan College*

Alumni Association Regional Chapters are a great way to mobilize enthusiastic alumni volunteers and develop opportunities in the various regions for alumni to get together, socialize and network all in the name of their alma mater. In this session we will discuss one school's approach to starting a chapter program from square one - the pitfalls and the successes, as well as offer time for your own questions, ideas, experiences and challenges.

#### **The Changing Face of Development:**

##### ***How Planned Giving Becomes the Gift Planning Model for Major Gifts***

*Paul Ditlevson, director of Legacy Estate Programs, Ashland University*

Turning development programs inside out and upside down is perhaps the best way to look into the future of charitable fund raising. Realizing not only "who has the money," but "what is it going to take to earn part of the charitable share" will take a whole new way of looking at fundraising. It's not a matter of tax avoidance so much as a matter of the heart. And the charity that captures the heart, embraces it with passion and vision for how the donor can participate in the process will take home the prize.

#### **Rising Waters...Rising Fears: Crisis Communication Case Study**

*Tom Perry, director of college relations, Marietta College*

A discussion of how Marietta College effectively communicated during a devastating flood that engulfed one-third of campus and crippled the community. In addition, strategic specific steps taken to limit the impact the negative media coverage had on recruitment will be shared.

#### **10 Biggest Mistakes in Direct Marketing**

*Norm Cosand, CEO, The Jackson Group*

Many communications managers (working in both academia and business) do not always execute direct marketing programs efficiently or effectively. This session will discuss how to avoid some of the most common pitfalls and demonstrate some innovative ideas to super-charge your direct marketing efforts.



6-9 p.m. **Vine and Dine networking banquet**

The opening banquet will be a served, three-course educational dining experience with a vintner from Chalet Debonne. Debonne wines will be paired with individual courses during the meal. Authentic Debonne grape juice and other non-alcoholic beverages will be available for anyone who wishes not to participate in the wine tasting.

9 p.m. **The Big Swap**

Bring a high-quality item featuring your institution's logo for the grab bag!

10 p.m.-? **Hospitality Suite**

Sponsored by Jackson Group

**Thursday, July 26**7:30-8:30 a.m. **Breakfast**

Sponsored by RuffaloCODY

8:30-9:30 a.m. **General session****Utilizing Social Networks to Strengthen Alumni Relationships**

*Eric Hodgson, Estrada*

Social networks like Facebook and Myspace have been used by many Web users but have yet to be embraced by college administrators. The relationship between student and college begins long before the first day of class and carries well past graduation. These forums have become an everyday communication tool during this long cycle without much college involvement. It is time to join the fray without becoming shunned or being seen as an outsider.

During this session, we will:

- Understand the history of social networking sites
- Learn the unwritten rules of these networks
- See how other colleges and universities have joined these networks successfully

9:30-9:45 a.m. **Break**9:45-10:30 **Concurrent sessions II****Corporate Relations of the Future**

*Panel discussion*

Best practices in the realm of corporate relations will be shared by Dave LaBanc, director of corporate and foundation relations at Elmhurst College and Matt Meyer, associate director of corporate and foundation relations at The Ohio State University. A question and answer period will follow. Al DiFranco will moderate.

**Campaign Counting and Reporting: A New Paradigm**

*Joe Bull, The Ohio State University*

In the post-Enron era of heightened accountability, auditors, regulators and even legislators are voicing their opinions on the methods of counting and reporting campaign activity. The National Committee on Planned Giving has issued a new way of reporting and counting campaign activity which addresses the issues of the current environment. This session will examine the new NCPG guidelines and discuss how easy they are to implement for organizations of all sizes.

**Web as the Hub**

*Eric Hodgson, Estrada*

Over the past few years, the Web has grown from an information medium to the center of communications. Using examples in and out of higher education, we'll show ways that institutions are funneling alumni, parents, students and prospects to their Web site to show, tell and interact.

During this session we will,

- Identify opportunities to push alumni and other visitors to the Web
- Learn steps to take to promote the Web across campus for buy-in and involvement

**Legal Issues in Fundraising for Advancement Newcomers***Phil Purcell, Ball State University Foundation*

Phil will give an overview of the basic legal issues all advancement newcomers should be aware of as they begin their careers. Any "more seasoned" fundraising professionals who would like a refresher of charitable giving tax laws are more than welcome to attend as well!

**Faculty/Staff Campaign Panel**

Paul Ditlevson will moderate a panel discussion and Q/A with ICAA colleagues who have enjoyed success with their Faculty/Staff Campaigns. Participants will be Heather Harmon, director of annual giving, Wilmington College; Lin Roberts, annual fund coordinator, Urbana; and Barb Quatman, director of development, Bluffton University.

10:30-11:15 a.m. **Concurrent Session III****Legal Issues in Fundraising***Phil Purcell, Ball State University Foundation*

This session will focus on advanced topics and trends in legal issues related to fundraising, such as Charitable IRA Rollover and other techniques and programs we should be aware of to help advise our constituents.

**Strategic Advancement: Aligning Your Resources to Attract Philanthropy***Goettler Associates*

Today's nonprofit organizations are operating in a marketplace that is more dynamic and more competitive than ever before. Successful fund raising depends on the alignment, coordination and support of several closely related functions.

**The Potential and Pitfalls of Parent Giving Programs***Nancy Noecker, Denison University*

What's different about parent fundraising...how to get started and how to take your parent program to the next level. The importance of developing on-campus relationships with admissions, alumni, student life and prospect research to identify, cultivate and steward parent donors and volunteers will be explored.

- Partnering with major gift team for leadership gifts
- Events that strengthen parent fundraising

**Annual Fund Calling Campaigns Today***Heather Albrecht, RuffaloCODY*

Description to come

**Getting the Most for Your Professional Photography Dollars***Sally Orgren, art director, Corcoran Communications*

Sally will explore the best ways to work with high-dollar professional photographers, offering tips from successful sessions to get students to volunteer, scheduling tips to get more shots out of the session without killing the photographer, questions to ask when shopping around for photographers... This session will be interactive and responsive to specific questions as much as possible

11:15-11:30 **Break**11:30-12:30 **General Session****Financial Markets: Update, Outlook and Challenges:*****Everything your donors want to know about the market....but you were afraid to answer****John Augustine, VB and Chief Investment Strategist, Fifth Third Asset Management*

Do you dread the occasional phone call from donors regarding the financial market? John will provide valuable information to ease the fears of everyone involved in the advancement world. During this discussion John will provide information on current asset class returns in addition to a global economic update. He will cover fundamentals, risks and what investment strategists are watching in the financial markets, and even recommendations for investors. This phenomenal program will be a benefit to you and your donors alike!

12:30-1:30 p.m. **Lunch/Roundtables**

sponsored by Fifth Third Bank

Roundtables facilitated by morning speakers

1:30-6:30 p.m. **Recreation** (sign up at the registration table)

Golf – Geneva-on-the-Lake Municipal GC

Corn hole tournament

10-minute massages

Shopping excursion

Volleyball

7:30-9:30 p.m. **Awards banquet**

9:30 p.m.-? **Hospitality suite**

sponsored by Goettler Associates

## Friday, July 27

8:15-9:15 a.m. **Breakfast**

sponsored by Herald Printing

9:15-10:15 a.m. **General session**

### **Relationship Management and Community Involvement**

*Bob DiBiasio, Cleveland Indians vice president, public relations*

We all know how important building and sustaining relationships is to our personal and professional success. An alumnus of an ICAA member institution (Ohio Wesleyan) and an active member of the community, Bob DiBiasio understands how important relationships are to doing business and making a difference. He will share with us stories of success and tips for building and sustaining successful relationships.

10:15-11 a.m. **Presidential address**

*Raleigh Stanton Hales Jr., Ph.D., president, College of Wooster*

President R. Stanton Hales retires this summer after nearly 30 years of leadership in higher education. He will reflect on some of the successes he has seen at the College of Wooster in his 12 years as president and share what he has learned through the years about college advancement.

11 a.m.-noon **ICAA business meeting**

*Paul Chewning, WVICU*

As if the ICAA business meeting itself were not enough incentive to attend this final session of the 2007 Summer Conference, **there will be a raffle drawing for an exciting weekend getaway, courtesy of The Lodge & Conference Center at Geneva State Park.**

### **Other conference details:**

#### **Publications exchange:**

Share your great ideas with colleagues by placing 25-30 copies of your best development materials, alumni periodicals, admissions publications and special event brochures on the literature table.

#### **The Big Swap:**

Don't forget your 'Big Swap' item! Bring a high-quality item featuring your institution's logo to dinner Wednesday night to include in the grab bag.

**Attire:**

The ICAA Summer Conference is a comfortable and information event. Dress is resort casual, other than Thursday night's awards banquet, which is business casual.

**Hospitality suite:**

Each evening, enjoy the friendly hospitality suite located in Suite 126. This is a time where ICAA summer conference guests can kick back and relax in comfort as they get to know each other and take a break from business.

**Conference costs and deadlines:**

Conference registration is still just \$195 per person and includes all meals from Wednesday's dinner through Friday's breakfast and all educational sessions. The conference registration deadline is Monday, July 9, 2007. Please register and pay online with Visa or MasterCard.

Spouses and guests who do not plan to participate in the Summer Conference sessions are welcome to join us for meals and enjoy The Lodge at their leisure. Please indicate the meal(s) they plan to share when registering. You may pay with two credit cards; for instance an institutional card for the conference and a personal card for guest meals and/or golf. Directions are included on the registration form.

Please contact Kristi Wilkerson directly with questions regarding registration at (304) 345-5525 or [kristi.wilkerson@wvicu.org](mailto:kristi.wilkerson@wvicu.org).

**Lodging details and deadlines:**

Special ICAA rate for rooms at Lodge and Conference Center at Geneva State Park are \$109.95 for single or double occupancy. Reservations must be made by July 6 in order to get this rate and to be guaranteed lodging. Reservations are to be accompanied by a deposit equivalent to one night's room. Deposits may be made by check or credit card. Deposits made by credit card are charged on the date the reservation is processed. Contact the lodge directly at 800-801-9982 and mention ICAA.

Guaranteed check-in is at 4p.m. Check out is 11a.m.

**Lodge and Conference Center at Geneva State Park**  
**4888 North Broadway**  
**Geneva-on-the-Lake, OH 44041**

**The resort:**

The Lodge and Conference Center at Geneva-on-the-Lake is one of the newest Ohio vacation spots and conference destinations. This beautiful lakeside resort is reminiscent of a cozy country inn, but with all the best amenities in Ohio lodging. Relax at the hotel or visit one of the many nearby attractions, it's up to you. Local attractions include more than 20 local wineries (maps are available at the front desk for self-guided tours) as well as boating, fishing, canoeing, hiking, nature walks, bird-watching and picnicking in adjacent Geneva State Park; historic covered bridges, lighthouses and Underground Railroad sites.

**Directions:**

From I-90, take exit 218 to OH 534 and follow signs to the lodge. It is less than 10 minutes from the highway. The lodge is one mile past the Geneva State Park entrance (do not turn into the park entrance.) Look for a blue sign. Turn left into the lodge parking lot.

**Many thanks to our sponsors:**



Jackson Group  
Goettler Associates  
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Herald Printing

## Speaker biographies

### General session speakers:

#### **Eric Lutzo, Principal, Forward Thought**

Eric has more than 10 years of experience as an executive and team coach. He earned his master's of business administration degree from Case Western Reserve University's Weatherhead School of Management and his bachelor's in business administration from Kent State University. Forward Thought's mission "is to help organizations become more profitable, teams more productive and individuals more aware through coaching, personal and team assessment and facilitation." Eric's strengths in coaching, leadership development and strategic planning are a strong fit with the company's core values.



Eric Lutzo

#### **Eric Hodgson, Estrada**

Eric brings many years of Web content management experience to higher education. Working in multiple industries, Eric has always looked for methods to use technology to advance marketing practices. He enjoys helping colleges and universities embrace the Web, assisting with strategic planning, setting roles and processes across campus and helping Web authors develop better content.



Eric Hodgson

#### **John Augustine, CFA, Fifth Third Bank**

John is based in Cincinnati as the chief investment strategist for Fifth Third Bank's Investment Advisors Group. He is a member of the investment policy committee, Investment Strategy Team, Alternative Investments Team and Focus Funds Selection Team. John is also the portfolio manager of the International ADR Stock Portfolio. He has appeared frequently in the media – including CNBC and Bloomberg. He is a former president and board member for the Dayton Society of Financial Analysts; is on the University of Dayton - Flyer Investment Advisory Board; and, is a part-time business professor in the graduate school at the University of Dayton.



John Augustine

#### **Bob DiBiasio, Cleveland Indians vice president, public relations**

Bob DiBiasio is entering his 29th season in Major League Baseball, his 28th with the Indians. He was the 1999 recipient of the prestigious Robert O. Fischel Award for Public Relations Excellence in Major League Baseball. He serves as the president of Cleveland Indians Charities and is an honorary member of the executive board of the Boys and Girls Clubs of Cleveland. He earned degrees in journalism and education from Ohio Wesleyan University in 1977 where he was sports editor of the school paper, a student sports information director and did color on OWU football and basketball broadcasts. He resides in Solon, Ohio, with his wife Penny, and their two children.



Bob DiBiasio

#### **R. Stanton Hales, The College of Wooster, president**

Dr. Hales has served as president of The College of Wooster since 1995. Active in a number of professional organizations, he has recently been treasurer and board member of the Association of American Colleges & Universities. Outside of academics, he is a six-time national champion badminton player, most recently winning senior crowns in 2002 and 2003. He was one of three deputy referees for the badminton competition at the 1996 Summer Olympic Games in Atlanta. In the area of public service, he served on Governor Robert Taft's Commission on Higher Education and the Economy in 2003-04. In 2002-03, he chaired a Site Selection Task Force for the Wayne County Chapter of the American Red Cross. He and his wife, Diane, have two adult children.



Stan Hales

**Concurrent session speakers:****Tim Channell, director of alumni relations, West Virginia Wesleyan College**

In his role at West Virginia Wesleyan, Tim has been instrumental in developing a stronger alumni presence on the campus, organizing more than 30 alumni regional events each year, introducing an online community and coordinating homecoming and commencement activities. He has served as speaker, roundtable leader, alumni track co-chair and a host judge for various CASE District II conferences. He is a member of the West Virginia Alumni Director's Association.

**Paul D. Ditlevson, director of legacy estate programs, Ashland University**

Paul is president of the North Central Ohio Planned Giving Council and an active member of the Northern Ohio Planned Giving Council. He is a frequent speaker where creative strategies for charitable estate planning issues are presented. He has introduced commonly used techniques in business to the charitable community by turning life income strategies into the acquisition of new off-campus sites. Paul has taken deferred giving and transformed it into current giving through specific gift-planning strategies.

**Tom Perry, director of college relations, Marietta College**

With 15 years of marketing and journalism experience Tom has served in his current role since January 2003. He works to promote and enhance the image and visibility of the college and to provide marketing, public relations, media and publications support for all of Marietta College. He is an integral part of the college's integrated marketing initiative. In the community, he is on the board of directors for the Greater Marietta United Way. He and his wife, Traci, reside in Belpre, Ohio, with their daughter, Taylor.

**Norm Cosand, CEO, The Jackson Group**

Norm has more than 25 years of experience in corporate management, marketing and strategic planning. He has been a speaker at numerous seminars and trade associations and is recognized as a leader in the integration of technology into marketing communications. He has been the architect of many successful campaigns including programs for lead generation, customer loyalty, new product launches and driving retail traffic. His client list includes: Roche Diagnostics, Monsanto, Johnson & Johnson, Starbucks, Square D, Lowe's Home Improvement, Pinehurst Golf Resort, Bank of America, Caterpillar and many others.

**Joseph O. Bull, director of planned giving, The Ohio State University**

Joe began as director of the Campaign for Alumni House at OSU in 1991 and assumed his current position in 1994. He was the 2005 chair of the board of directors of the National Committee on Planned Giving. Additionally, he serves as a member of the editorial advisory board for the national newsletter Planned Giving Today, the editorial board of the web-based Planned Giving Design Center and as a faculty member for The Academy of Gift Planning. He earned his Juris Doctor in 1985 and is admitted to the Bar in Ohio and North Carolina.

**Phil Purcell, vice-president for planned giving and endowment stewardship, Ball State University Foundation**

Phil teaches courses on law, philanthropy and planned giving at the Indiana University School of Law and is a faculty member of the Indiana University Center on Philanthropy and Fundraising School. He is a volunteer on the Tax Exempt Organization Advisory Council for the Internal Revenue Service (Great Lakes States region), is a member of the board of directors for the National Committee on Planned Giving and has written articles on charitable gift and estate planning that have appeared in The Journal of Gift Planning, CASE Currents and other publications.

**John Goettler, president, Goettler Associates**

Goettler Associates was founded in 1965 to assist with nonprofit organizations' fund-raising initiatives. John Goettler joined the firm in 1986 and became president in 2000. He 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. Active in professional and community affairs, John lives in Columbus with his wife, Valerie, and three children.

**Heather Albrecht, vice president, non-profit services, RuffaloCODY**

A former fundraiser for Northern Michigan University and UCLA, Heather now works with institutions in planning and implementing annual giving programs and leadership volunteer efforts. This includes telemarketing and direct mail efforts for parent, student and senior class gift programs, campaign giving, donor stewardship and recognition strategies and prospect management. She is an active member of the Association of Fundraising Professionals and Annual Giving Professional Network and has been recognized as a "stellar speaker" by CASE for her presentations.

**Sally Oregren, art director, Corcoran Communications**

Sally Oregren has planned and supervised higher education photography for more than 20 years. During that time she has worked with many professional photographers and well over 150 institutions whose enrollments range from fewer than 500 students to 8,000. She enjoys helping her clients craft successful marketing images using their own students and campus locations. Sally graduated from the University of Iowa School of Liberal Arts with an emphasis in design. She is creative director for Corcoran Communications and resides in New Jersey.