



CASE: KENTUCKY IN
E3D
Discover • Develop • Deliver

2011 CASE **Kentucky** Annual Conference
December 8 & 9 | Lexington Hilton Downtown



**2011 CASE KENTUCKY
ANNUAL CONFERENCE**
Discover, Develop, Deliver

These three key ingredients
can lead to success in
advancing the missions of
our institutions:

Discover what can make
a difference,

learn how to **Develop**
successful outcomes,

and show how you can
Deliver results!

Greetings CASE Kentucky Colleagues,

Welcome to the 2011 CASE-Kentucky (CASE-KY) Conference. The Kentucky Chapter of the Council for Advancement and Support of Education is one of several state chapters that conducts an annual conference. Each year, members of the conference committee take pride in planning and implementing a day-and-a-half conference that provides opportunities to learn, grow, and exchange ideas with colleagues representing colleges, universities, and independent schools across the Commonwealth. As many institutions are dealing with budget cuts that can affect opportunities for professional development, CASE Kentucky takes pride in hosting and putting together a quality conference that is physically and fiscally accessible.

Things are changing all around us – larger and more comprehensive campaigns, ever increasing demands to do more with less, changing policies and strategies, minimal resources and demands to leverage increased use of technologies and relating to ever-changing constituencies at our institutions. As advancement professionals, we must keep try to keep pace with these changing dynamics in order to provide extraordinary services. The importance of building and sustaining meaningful and lasting relationships with alumni, donors, prospects and other constituents of your institution as well as creating and maintaining effective communications have never been greater.

This year at CASE Kentucky we are pleased to have a variety and diversity of speakers and presenters from both near and far for 360 degrees of discussions, presentations and dialogue on what we can do to enhance ourselves and the operations at our institutions.

Opening this year’s CASE KY conference is Coach Scott Davenport, head men’s basketball coach of Bellarmine University and last year’s NCAA Division II Men’s Basketball Champions. Scott is a well sought after speaker and will give an exhilarating presentation on teamwork by someone who knows a thing or two about the topic! Join Scott as he shares lessons on teamwork and collaboration. This presentation will be valuable for all.

At Thursday’s luncheon, Rob Henry, Executive Director of Emerging Constituencies, Council for Advancement and Support Education, will present on “Building a Case for Diversity”. In this role, Henry provides leadership for initiatives designed to engage and serve selected CASE U.S. and international constituencies with significant emphasis on efforts to increase advancement in diverse populations and cultures. He was also awarded the CASE Crystal Apple for teaching excellence in 2005.

Speaking directly to advancement professionals, this conference will provide you and your institution with a 3-D perspective to move to the next level of excellence. We are sure you will gain information needed to enhance your skills and talents, develop a top-notch team, and produce excellent results.



Sincerely,

Dwight D. Dozier, Chair
2011 Conference Committee



2011 CASE KENTUCKY ANNUAL CONFERENCE

At-A-Glance Schedule

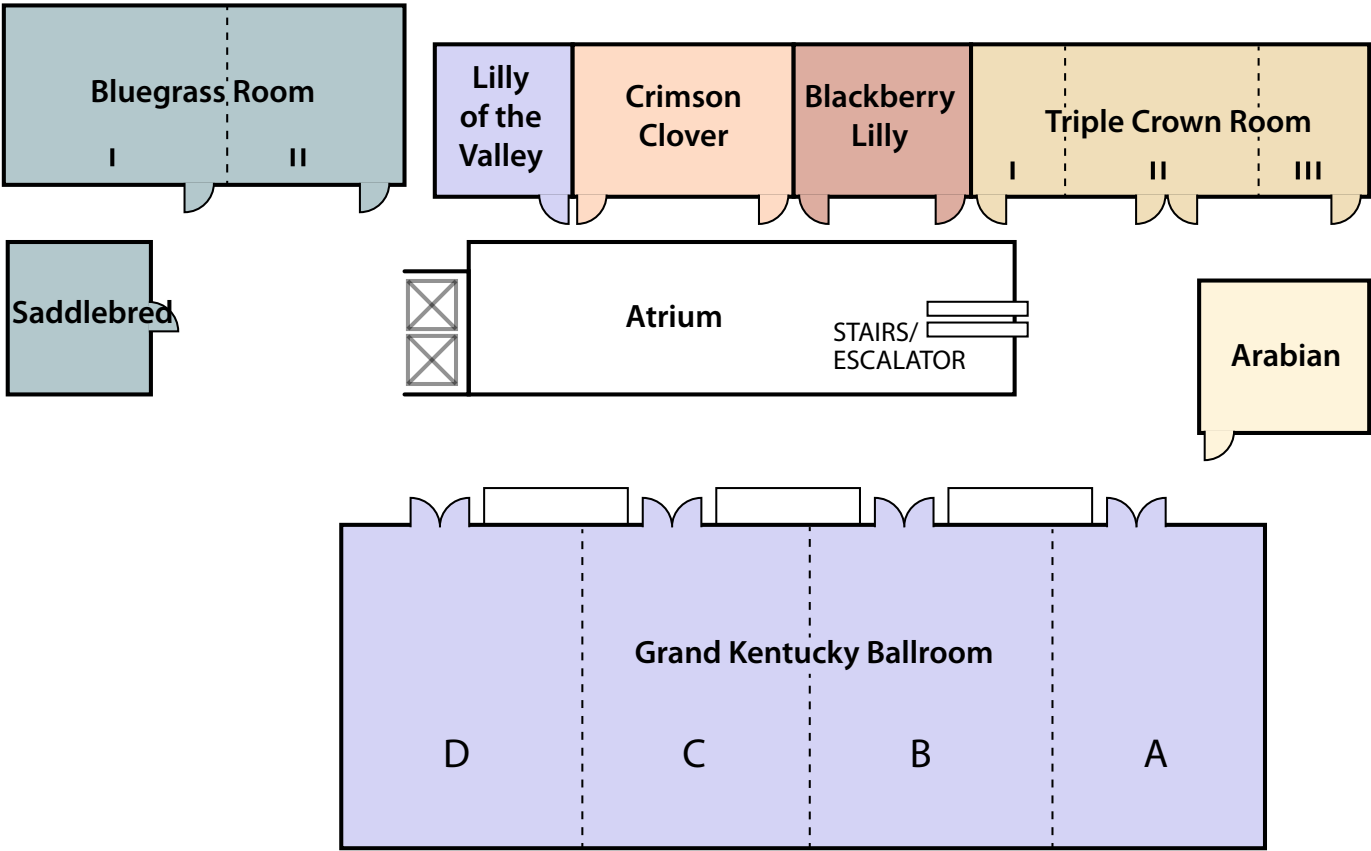
Thursday, December 8, 2011

7:30 am	Registration – Area Top of Escalator
7:30 am – 9:00 am	Continental Breakfast – Area Top of Escalator
8:00 am – 9:15 am	Newcomers Session – Bluegrass Room
9:20 am – 9:30 am	Welcome – Opening Remarks – Salon ABC
9:30 am – 10:30 am	Opening Session – Keynote Address – Salon ABC
10:30 am – 10:45 am	Break
10:45 am – 12:00 pm	Breakout Session I
12:00 pm – 1:30 pm	Lunch – Salon ABC
1:45 pm – 3:00 pm	Breakout Session II
3:00 pm – 3:15 pm	Break
3:15 pm – 4:45 pm	Breakout Session III
5:00 pm – 6:00 pm	Newcomers' Social – Yesterday's Bar-Convention Center
5:00 pm – 8:00 pm	Dinner on your own
8:00 pm – 12:00 am	Special Event – Magnolia Junior Ballroom

Friday, December 9, 2011

7:30 am	Registration – Area Top of the Escalator
7:30 am – 9:00 am	Continental Breakfast – Area Top of Escalator
9:00 am – 11:45 am	Executive Management Session – Blackberry Lilly Room
9:00 am – 10:15 am	Breakout Session IV
10:15 am – 10:30 am	Break
10:30 am – 11:45 am	Breakout Session V
12:00 pm – 1:30 pm	Closing Lunch/Awards Presentation – Salon ABC <i>Followed by short CASE-KY business meeting</i>

Lexington Hilton Downtown – Conference Space Layout



Area Top of Escalators

Continental Breakfast
 Registration
 Vendors

Grand Kentucky Ballroom

Opening/Welcome Session
 General Sessions
 Lunch
 Philanthropy Track

Blackberry Lilly

Executive Track

Magnolia Junior Ballroom

Special Event

Bluegrass Room

Alumni Relations’ Track
 Newcomers’ Session

Triple Crown Room

Communications’ Track

Crimson Clover Room

Advancement Services’ Track

Yesterday’s Billiards – Bar & Grill

Convention Center
 Newcomers’ Social

Conference Agenda

Thursday, December 8, 2011

7:30 am **Registration Open – Area Top of Escalator**

7:30 am – 9:15 am **Continental Breakfast – Area Top of Escalator**

8:00 am – 9:15 am **Newcomers Session – Bluegrass Room**

Are You New to Advancement or Simply New to CASE-Kentucky?

During this informal introductory session, you will have the opportunity to interact with rookies as well as seasoned advancement professionals to learn about tools and resources that will enhance your opportunities for success. A panel of advancement veterans will lead the way, discussing the successes and challenges they've experienced along the way. Take advantage of this chance to exchange thoughts and ideas with Kentucky peers, and take new ideas and perspectives with you as you move forward in the conference and your career.

Panelists for this session are: Carolee Allen, Associate Director for Alumni Relations at University of Louisville, Kara Covert, Associate Vice President for Development at Eastern Kentucky University, Monica Ginney, Director of Alumni Relations at Thomas More College, Kirk Purdom, Vice President for Advancement at Transylvania University, and Dwight Dozier, Assistant Vice President for Advancement Services and Interim Assistant Vice President for Alumni Relations at U of L, as well as the 2011 CASE-KY Conference Chair.

Facilitator: Rikki Starich, Major Gift Officer, Transylvania University.

Facilitator: Terri Whitehouse, Assistant Director Research, University of Louisville.

9:20 am – 9:30 am **Welcome & Opening Remarks – Salon ABC**

Natasa Mongiardo, President, CASE Kentucky
Director, Alumni Programs
Transylvania University

Tina Kaufmann, CASE District III, President
Associate Vice President for Development
Bellarmine University

Dwight Dozier, Chair and President-Elect
2011 CASE Kentucky Conference
Assistant Vice President for Advancement Services and
Interim Assistant Vice President for Alumni Relations
University of Louisville

Thursday, December 8, 2011

9:30 am – 10:30 am Keynote Address – Salon ABC

“None of Us are as Good as All of Us”



Speaker: Scott Davenport, Head Basketball Coach, Bellarmine University. Scott became the 11th coach in Bellarmine University’s history, and in six years took Bellarmine all the way to the top by leading the Knights to the 2011 NCAA Division II National Championship. For his efforts, he was named national coach of the year by two different organizations: the National Association of Basketball Coaches and the Division II Bulletin. Coach Davenport, a Louisville native, received both his undergraduate and masters degree from the University of Louisville. In 2011, everything came together as Davenport led Bellarmine to a 33-2 record while capturing the Knights’ first national championship in any sport. Among the milestones reached by the 2011 squad were best winning percentage, most wins, and most consecutive wins, while recording a third straight 20-win season. . His

colleagues recognized him for this accomplishment by voting him the 2011 GLVC Coach of the Year. In his six years at Bellarmine, two players have been named to All-America squads, 12 have been named to All-GLVC teams while one has earned conference Player of the Year and another was named GLVC Freshman of the Year. Prior to coming to Bellarmine, Davenport served nine years as an assistant coach at the University of Louisville under Hall of Fame coach Denny Crum and national championship-winning coach Rick Pitino. He also served a year as an assistant coach on Mike Pollio’s staff at Virginia Commonwealth where he coached alongside Tubby Smith. Before heading to Louisville, Davenport spent 10 seasons as the head boy’s coach at Ballard High School where he won a state championship in 1988 and coached two future NBA players in DeJuan Wheat and Allan Houston. Scott and his wife Sharon have two sons: Russ and Doug, who are both Bellarmine graduates. Russ works for General Electric in Louisville. Doug, who played four years at Bellarmine, is a graduate assistant on Chris Mack’s staff at Xavier University.

10:30 am – 10:45 am Break

10:45 am – Noon Breakout Session I – Individual Tracks

10:45 am – Noon Advancement Services – Crimson Clover Room

Tennessee Tech's 3D Process for Implementing a New Prospect Management System

Over the last year, Tennessee Tech's division of University Development and Advancement Services worked collaboratively to better its prospect management and research process. As a team they discovered what pieces were working as well as those that were not. A new rating system and deployment of prospect information was developed. Finally the system was delivered both as an in-office application as well as granting mobile access while on the road. Come hear the journey that these offices took to discover, develop, and deliver a new way to provide valuable prospect information.

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10:45 am – Noon Advancement Services – Crimson Clover Room



Speaker: Andy Wilson, Associate Vice President, University Development, Tennessee Technological University. Andy joined the Tennessee Tech University Development operation in July 2007 as associate vice president. He is responsible for the development program in which his operations are to raise private and corporate support to enhance and advance Tennessee Tech's vision of life-long success of Tech students. For fiscal year 2010, Tech surpassed all previous fundraising years, raising over \$8.7 million. Tennessee Tech is nestled in the Upper Cumberland region of Tennessee between Nashville and Knoxville off interstate I-40. Tech was founded in 1915 and today boasts a student enrollment of 11,758 and is proud of its engineering curriculum. Tech competes athletically in the Ohio Valley Conference. Before coming to Tech, Andy was at Northern Kentucky University just south of Cincinnati, Ohio as the corporate and foundation relations director. There he was responsible for coordinating NKU's efforts in securing financial support for the university's programs and scholarship funds from regional and national corporations, businesses, and foundations. He previously served as the Director of Development and Alumni Relations for Lexington Catholic High School in Lexington, KY. In that position, Andy was responsible for implementing an \$8 million fundraising campaign as well as organizing class reunions and fundraising events. Andy also served as Director of Alumni Affairs for Campbellsville University from 1992-1997. As well as serving Tech, Andy also serves on the nine state Council for the Advancement and Support of Education District III conference committee, served as president and other offices with the CASE Kentucky Board (CASE KY) and is a member of the First Baptist Church in Cookeville, TN. These activities have provided Andy with valuable experience as he directs the university's gift support program. Andy and his wife, Ami, live in southern Cookeville, TN and have two children, Emily and David.



Speaker: John W. Smith, Associate Director, Advancement Services, Tennessee Technological University. John arrived at Tennessee Tech in 1990 as a computer science undergraduate and has never left. After earning his BS in computer science in 1994, he was fortunate to serve as a graduate assistant in the Office of University Advancement in the spring of 1995 which led to his full-time employment with the department in July 1995. He earned his MBA in the spring of 1998 and has completed two classes toward his Ed.S. John has continued to assume additional responsibilities and staff since 1995. In 2003, prospect research and management was added to John's responsibilities and a research associate was hired. In 2005, John assumed the role of Associate Director for Advancement Services when the gifts/records and stewardship center was added to his supervision. Also, in 2005, John served as project manager for the conversion to Raiser's Edge. Recently Advancement Services was reorganized to allow for employment growth, more focus on prospect management and stewardship and further delegation of duties. Currently, John supervises three employees and is responsible for gift and stewardship services as well as system administration. John has served as President of the Tennessee Advancement Resources Council (similar to CASE-KY), program committee co-chair for the CASE III Advancement Services track at the joint CASE III and IV conference in New Orleans last February, and currently as the chairperson of the Information Technology Committee on campus. Locally, John serves as the Vice President for the Sparta Little League. John and his wife, April, reside in Sparta, TN, with their children, David (11) and Lindi (9).

Thursday, December 8, 2011

10:45 am – Noon Alumni Relations – Bluegrass Room

Digital Technology in Alumni Relations

Objectives - What resources are available - and what to stay away from; How to accomplish a lot with a little; Using alumni volunteers online; and What are reasonable expected outcomes?



Speaker: Jeff Rushton, Director, Digital Media, University of Louisville. Jeff is a seasoned internet professional with over 16 years' experience managing internet companies and online initiatives. He has been a C-level executive or owner of seven start-up companies and has been instrumental in building online solutions that have generated over \$1B in revenue. He has extensive experience generating sales, leads, followers and viewers using email, online marketing, SEO, SEM, social media and traditional marketing. Jeff has also been a keynote speaker in several major internet and marketing conferences and has developed online solutions for Future 100 companies.

10:45 am – Noon Communications – Triple Crown Room

The Well-Connected Campus: Using Social Media to Engage the "Sobile" Student

The "Sobile" student today is part social and part mobile. Today's students are connected and communicate in ways we never thought would be possible just a few short years ago. Students come to college expecting a customized experience, and as a result, higher education administrators, faculty and staff must change to meet the demands of their students. How do we reach this well-connected generation, how do we recruit them, retain them and how do we customize their collegiate experience – starting before they ever set foot on our campuses? During this session, you will learn how to reach out to students where they are, using emerging and affordable technologies that engage students and enhance your institution's brand and mission. Learn how to maximize the tools you are already using and maybe pick up a few new tricks along the way.



Speaker: Corie Martin, Manager, Creative Web Services, Western Kentucky University. After 12 years in the private marketing and media relations sector, Corie Martin joined Western Kentucky University in 2008 as Communications Coordinator for the Office of Undergraduate Admissions. Today, she serves as the Manager of Creative Web Services for the WKU Division of Public Affairs. Her office oversees all WKU top-level web content as well as WKU's main social media presences and interactive media ventures. Since 2010, Corie has led the WKU.edu website redesign and CMS migration effort and has forged partnerships with OmniUpdate, NuCloud, Foursquare on Campus and more. Corie has extensively studied the use of social and interactive media in higher ed marketing and communication, and she frequently speaks at regional and national conferences on this subject including the 2011 Higher Ed Web Conference, ACCED-I Regional Summit, KACRAO and the upcoming 2012 Omni Update User's Conference.

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10:45 am – Noon Philanthropy – Salon D

Taking the Chill Out of Cold Calling

Development officers tend to think that cold calling is about securing a gift. It's not, but rather about getting the chance to meet the prospect and build a relationship that will allow for a major ask. Specifically, the purpose of a cold call is to set an appointment to make the pitch. This presentation will outline several techniques that will enable development officers to secure those elusive appointments.



Speaker: Jason Amore, Director of Major Gifts, University of Louisville. Jason began his career in relationship building at General Motors in their sports marketing/corporate sponsorship division. He called on dealers to engage them in the various professional sports relationships in the New York City area. From there he moved to the University at Buffalo (UB) raising support for the Division I athletics program from 2001 to 2004. While at UB, he cold-called and solicited corporate prospects for support ranging from \$1,000 to \$500,000. In addition, he identified and cold-called season ticket prospects for both football and basketball, increasing sales by 50%. In 2004, he became the Director of Major Gifts at Alfred University. The University was

in the midst of the largest capital campaign in its history, raising \$160 million against a \$150 million dollar goal. In the final two years of the campaign, he visited with 400 prospects and secured \$5 million dollars to help push the University over goal. Following his time at Alfred, he accepted the position of Director of Annual Giving at the State University of New York at Geneseo. Over two years he successfully increased alumni participation from 10% to 12% and increased annual support from \$435,000 to \$700,000. Itching to get back into major gift solicitations, Jason accepted the position of Director of Development at the Rochester Institute of Technology. He was the chief development officer for the Computer Science College and was charged with turning around a faltering program. Over the next two and a half years he visited 425 prospects and increased support from \$225,000 to \$3 million. Jason is currently the Director of Major Gifts at the JB Speed School of Engineering at the University of Louisville, a post he has held for a little over a year. During that period he has made over 200 visits and secured gifts totaling \$4 million.

12:00 pm – 1:30 pm Lunch – Salon ABC

“Building a Case for Diversity”



Speaker: Robert L. Henry (Rob), Executive Director of Emerging Constituencies, Council for Advancement and Support of Education.

Rob Henry has acquired extensive managerial and development experience during his nineteen-year professional career. Currently, he serves as the executive director of emerging constituencies with the Council for Advancement and Support of Education (CASE). In this role, Henry provides leadership for initiatives designed to engage and serve selected CASE U.S. and international constituencies with significant emphasis on efforts to increase advancement in diverse populations and cultures. In addition, he oversees the CASE ASAP program and career center.

Henry previously served as director of individual Rob Henry has acquired extensive managerial and development experience during his nineteen-year professional career. Currently, he serves as the executive director of emerging constituencies with the Council for Advancement and Support of Education (CASE). In this role, Henry provides leadership for initiatives designed to engage and serve selected CASE U.S. and international constituencies with significant emphasis on efforts to increase advancement in

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12:00 pm – 1:30 pm Lunch/Keynote – Salon ABC

diverse populations and cultures. In addition, he oversees the CASE ASAP program and career center. Henry previously served as director of individual giving at Yale University, where he was responsible for developing and implementing a comprehensive annual and special gift fundraising program, soliciting donors of \$100,000+, and managing the volunteer program for the School of Management. He has also served as assistant vice president of special and annual giving at the University of Connecticut Foundation, and began his development career at Michigan State University. In each advancement position, Henry has significantly raised support and participation while simultaneously assessing the potential of the emerging market. This experience, coupled with his attention to fundamental infrastructure practices, has allowed him to offer training and development to international markets such as Africa, London, Australia and Mexico. This valuable feedback has translated into increased results, improved messages and enhanced efficiencies. Henry's specialties include high-end asks (special/major gifts), budget management, staff motivation, infrastructure development and fundraising for diverse populations. He often presents at CASE conferences and served as a board member for the Association of Fundraising Professionals, Foster Child Scholarship program and 4-H Extension Council. He was also awarded the CASE Crystal Apple for teaching excellence in 2005. He holds a bachelor's degree in speech communication from Murray State University and a master's degree in communication and public address from Eastern Michigan University.

1:45 pm – 3:00 pm Breakout Session II – Individual Tracks

1:45 pm – 3:00 pm Advancement Services – Crimson Clover Room

Osmosis: Gathering Report Criteria! Don't give me what I asked for, give me what I need!

Ever wonder why we can never get it right the first time? Well, we at the University of Louisville have developed a sure-fire way of collecting report criteria that will prevent re-dos! Not really. But we do have a report request application that helps define specifications without being too bothersome to the requestors. We call it the "Advancement Services Request System (ASRS)." I'd like to tell you about it.



Speaker: Jack Meadows, Director Information Systems, University of Louisville. Jack has worked in Advancement Services for the University of Louisville for 16 years. Beginning as a programmer in a two-person shop, he now manages the technical unit of University Advancement which is comprised of a four-person programming team, a desktop support specialist, network administrator, and an information analyst. Significant accomplishments during his tenure at UofL include working through the Y2K issues; bringing the department from an IDMS mainframe environment to a client/server architecture, and eventually, to a web-based system; development of an interactive donor recognition display; and the development of several data integrity checks that help keep the alumni/donor database reliable and credible. In 2009, Jack's contributions and dedicated service to the university were recognized when he received the inaugural William J. Rothwell Staff Award. Prior to employment at UofL, Jack served proudly in the United States Army for 20 years. He retired from the Intelligence and Security Command in 1994. He is a graduate from Rivier College in Nashua, New Hampshire. Jack is the proud grandfather of a first grader named Elliot. Elliot is a gold medal reader and a star running back in his pee wee flag football league.

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1:45 pm – 3:00 pm Alumni Relations – Bluegrass Room

The Changing Face(s) of Alumni: Implications of an Increasing Population of Adult Learners in Our Universities

As the enrollment numbers of adult and non-traditional students increase, so do the issues not only for the adult learners, but the university as well. Balancing family, work, and school are obvious issues for the student, so what loyalty do they feel once they graduate? Providing an environment of inclusiveness, reducing anxiety and minimizing barriers for adults may promote giving far beyond that of a traditional student. Adult students have years of experience in the workplace that makes them candidates to give much earlier than a traditional graduate. This session will bring a diverse presentation over the statistics of our changing university populations across the country, successful strategies for connecting with recent adult graduates, and areas to improve on.



Speaker: Matt Bergman, Instructor/Senior Academic Counselor, College of Education and Human Development, University of Louisville.

Matt is an Instructor/Senior Academic Counselor at the University of Louisville in the College of Education and Human Development. He teaches and advises adult students (25 and older) in the Bachelor of Science in Workforce Leadership program. Apart from his current position, he is poised to complete his Ph.D. in Educational Leadership and Organizational Development at UofL in Spring 2012. His research is focused on factors that impact adult learners in degree completion programs at four-year universities. He has also served in several other capacities at Appalachian State University and Lees-McRae College in Western North Carolina working in Enrollment Management, Athletic Learning Assistance, and Admissions. He has consistently shown his commitment to advancing degree attainment for reaching regional, state, and national educational goals for America. Prior to his career in Higher Education, Matt played Arena Football in Dayton, OH and Charleston, SC for a total of three seasons. He received a B.S. in Sports Administration, Physical Education, and Health Education from Union College in Barbourville, KY (Cum Laude). He received a Master of Arts in Higher Education Administration from Appalachian State University in Boone, NC. He is a teacher, administrator, and ambassador of degree attainment both locally, and nationally.



Speaker: Matt Williams, Director of Major Gifts for the Louis D. Brandeis School of Law, University of Louisville.

Having joined the Advancement team at UofL in 2008, Matt has served in two previous fundraising positions, and has volunteered in several capacities within the University Advancement operation, including as a member of the Success Planning Committee, and the Communication Workout Team. Matt has a passion for Higher Education, with specific interest in improving communication with alumni, and outreach to non-traditional/graduate school alumni populations. Prior to joining UofL in 2008, Matt worked for Gardner-Webb University, his alma-mater, in a series of roles, from Admissions Counselor to Major Gifts Officer to Director of the Annual Campaign. Matt holds B.S. and MBA degrees from Gardner-Webb University.

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1:45 pm – 3:00 pm Communications – Triple Crown Room

Beyond the Org Chart: Communications and Marketing Structural Models

Where should communications and marketing report? What functions should be included? What are the pros and cons of centralized vs. decentralized models? Join CASE Vice President Rae Goldsmith for an exploration of communications and marketing structural models and share your perspectives about what works -- and what doesn't.



Speaker: Rae Goldsmith, Vice President of Advancement Resources, Council for Advancement and Support of Education. Rae oversees the development and delivery of advancement content through the offices of books publishing, communications, CURRENTS magazine, research and the CASE information center. Rae joined the CASE staff in 2005 after 22 years in educational communications and marketing. She served most recently as associate vice president for communications and marketing at the University of Louisville, where she led a nationally recognized integrated marketing program. She was also associate vice president for public relations and marketing at Central Michigan University and director of public information services at Ball State

University, where she earned a bachelor's degree in English and a master's degree in public relations. An active CASE volunteer before joining the staff, Rae chaired the Annual Assembly and the conference for senior public relations professionals, served on the Commission on Communications and Marketing and the District III board, and was a CURRENTS author and frequent conference speaker. She has been recognized with the CASE Crystal Apple Award for outstanding teaching at CASE conferences.

1:45 pm – 3:00 pm Philanthropy – Salon D

Do Women Really Matter in Philanthropy? – A Candid Conversation

Using research from the Women's Philanthropy Institute at the Centre on Philanthropy at Indiana University as the framework, this session will explore the questions: Does gender really matter in giving and, if so, what are the barriers to increasing women's giving? We will examine some of the myths that punctuate the fundraising culture about women's giving and learn strategies to overcome them. Examples of models of engagement in colleges, universities, and independent schools around the country will highlight best practices for more fully engaging all donors within an institution.



Speaker: Andrea Pactor, Associate Director, Women's Philanthropy Institute, Center on Philanthropy at Indiana University. As Associate Director of the Women's Philanthropy Institute, Andrea is responsible for program development and implementation, marketing, and operations. She has organized three national symposia on women and philanthropy, the most recent of which, Women World Wide Leading through Philanthropy, was in March 2011. She developed the first ever on-line course about women and philanthropy, *Women and Philanthropy – The Time is Now*, currently offered as a self-paced course on the *New York Times* Knowledge Network. Andrea is co-author of chapters on women and philanthropy, notably in

Fundraising Principles and Practices, *Leadership in Non-Profit Organizations*, and *Achieving Excellence in Fundraising*, all published in 2010. Andrea has served arts, education, and faith-based organizations as a professional and volunteer for more than 25 years. She has a BA from The America University; MA from the University of Michigan; and an MA in Philanthropic Studies from the University of Indiana.

Thursday, December 8, 2011

3:00 pm – 3:15 pm Break

3:15 pm – 4:45 pm Breakout Session III – Individual Tracks

3:15 pm – 4:45 pm Advancement Services – Crimson Clover Room

Standards of Ethical Conduct in Gift Acceptance

One of the most important things an advancement services professional can oversee is implementation of a solid Gift Acceptance Policy. Are there gifts that are better not to accept, and if so, what scenarios might you encounter? Learn about creating a policy that can be shared with your development staff and other leadership personnel at your University/College to keep them in favor with the IRS as well as your donors.



Speaker: Dorothy Morgan Ruble, Director of Advancement Services, Berea College

Dorothy Ruble is the Director of Advancement Services at Berea College. She is a Berea graduate with a B.S. in Business Administration. Her experience includes two years in the banking industry in customer service, seven years working in long term care administration, and 20 years in development at Berea College. She began in the area of preparing and mailing reports and acknowledgments to foundation donors, working as Executive Assistant to the Vice President for Alumni and College Relations before moving into her current position, which she has been in for the past 11 years. Dorothy serves on

various committees at the College and works closely with the Alumni Association during reunion events by serving where needed. In her spare time, she teaches Sunday school and sings in the church choir. She enjoys reading, outdoor activities, and spending time with family, especially traveling with her daughter.

3:15 pm – 4:45 pm Alumni Relations – Bluegrass Room

What I Wish I'd Known When I Took This Job

General Alumni Relations discussion.



Facilitator: Carolee Allen, University of Louisville. Carolee Allen has had a diversified career path. A proud native of Bardstown, Kentucky, Carolee became a Louisvillian while attending the University of Louisville in the late 1970's. An oboist during college and having played with the Louisville Orchestra, she graduated from the University of Louisville with a bachelor's degree in Music Education and continued on at U of L to receive her Masters in Education. Still performing vocally, she enjoys staying in the music world. Her professional career started as a multi-million dollar real estate agent and a corporate relocation trainer. In 1988, she began her government career for the

Louisville/Jefferson County Office for Economic Development (OED) as a business retention and expansion specialist to represent then Mayor Jerry Abramson and County Judge/Executive David Armstrong visiting areas businesses offering local government assistance and expediting issues. In her ten year tenure at OED, Carolee worked on major projects including the Airport Relocation Project, several major business expansion projects, multiple international trade missions, the development and implementation of the Industry Networks program and as a trained facilitator under the GE Works methodology, facilitated many of Mayor Abramson's successful CityWorks sessions. Having earned a reputation as a strategic, decisive and creative economic development knowledge based leader in the community, Carolee was one of County Judge/Executive Rebecca Jackson's first appointments to be installed in her administration for

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3:15 pm – 4:45 pm Alumni Relations – Bluegrass Room

Jefferson County government in January of 1999. As Chief Business Officer, it was an exciting opportunity that allowed her to have widespread impact on major issues, projects and initiatives pertaining to long range growth and development in our County. Also, in an extraordinary time, Carolee views her work on the historic change to and passage of the merger legislation allowing our former City/County government system to evolve into our current form of government known as Metro Louisville, as her greatest professional accomplishment. Her multi layered roles as Director of Business Development and Marketing for Louisville/Jefferson County Riverport Authority, Louisville Metro Properties and as Executive Vice President of Business Services with Career Resources Inc. kept her professional plate full. Under Metro Louisville government, she knows that what she has contributed to will have a long lasting, positive economic and workforce development affect on a community that she has been professionally and personally committed to for 22 years. Now with a new chapter beginning with her beloved University and her “family” at the Alumni Association and working to create, develop and sustain alumni networks, clubs and programming in the Commonwealth, things are coming full circle. Feeling strongly about the importance of quality higher education in our community and our Commonwealth, her volunteer hours were always dedicated and focused. Carolee served as President for the University Of Louisville Alumni Board Of Directors and has more recently served as an member of the Board of Overseers and was active on the government relations/advocacy committee. She was also one of the architects to create and launch the KentuckianaWorks Board, served on its executive committee and assisted Judge Jackson with the creation and facilitation of the highly respected organization known as the Young Professionals Association of Louisville (YPAL) in its first year. She is a past board member of the STAR Board and has been a strategic policy advisor for many organizations, groups and businesses, including the Louisville chapter National Association of Women Business Owners (NAWBO). Her “home-time” is topped off with a wonderful and supportive family, husband Ron and 2 children, Nate and Morgan.



Facilitator: Bobbie Rafferty. Bobbie Rafferty joined Spalding University in 2008. She holds a Bachelor of Arts in Economics from Converse College, and was a member of the inaugural graduating class from the Arts Administration program at Southern Methodist University, where she simultaneously earned both a Master of Arts in Arts Administration and an MBA. During her graduate work, she held internships with the Southern Methodist University Theatre, the SMU Summer Conservatory, and the New York Philharmonic. Bobbie has extensive experience in development and marketing in the non-profit sector, having worked with such institutions as the Dallas Symphony Orchestra, the Skylight Opera Company, the Wisconsin Conservatory of Music, the Tuscaloosa Symphony Orchestra, the Kentucky Opera, and most recently, the J. B. Speed Art Museum. She has served cultural and educational organizations in the South and Midwest as a development and marketing consultant. Her experience with academic institutions includes over a decade in various roles at the University of Alabama, where she served as Coordinator of College Advancement in the College of Arts and Sciences, as an instructor in the School of Music, and as Director of the Graduate Program in Theatre/Arts Administration and Assistant Professor in the Department of Theatre and Dance. At Alabama, she developed and taught courses in non-profit management and fund raising/development at both the undergraduate and graduate levels, and was active in campus and city organizations involved in cultural development, public education, and outreach initiatives. Bobbie is a native of South Carolina.

Thursday, December 8, 2011

3:15 pm – 4:45 pm Communications – Triple Crown Room

Using Market Research as the Foundation to your College's Marketing and Recruitment Plans

During the past five years KCTCS has embraced a market-research approach to determine customer perceptions, needs and wants. This session will share the research programs we have initiated including: Ensuring all marketing activities are research-based and designed to meet the needs of customers; conducting a formalized mystery shopping program to assist colleges in providing outstanding service to prospective students; conducting both quantitative and qualitative research methods to determine messaging and appropriate communication vehicles for targeted audiences; and developing and enhancing measurement tools to assess the effectiveness of System Office and college marketing/recruiting efforts.



Speaker: Terri Giltner, System Director of Marketing and Communications, KCTCS.

Terri has been marketing products and services ranging from fried chicken to seatbelts for over 28 years. Her marketing experience includes the development of national and regional TV/radio commercials, national and regional promotions, statewide public awareness campaigns, customer service initiatives, direct sales, development of marketing strategies/plans, and market research. Since 2005, Terri has been the System Director of Marketing and Communications for the Kentucky Community and Technical College System (KCTCS) that consists of 16 colleges and 65 campuses where she is responsible for the overall marketing and communication strategy. Her specific accomplishments include: Conducting a comprehensive statewide market research study of prospective students; Creating a mystery shopping program to measure the experience prospective students encounter when contacting all 16 colleges for information; Developing an online marketing toolkit for the 16 colleges; Establishing an integrated marketing process; Rolling out a new research-based state-wide branding strategy; and Executing a statewide public advocacy and awareness campaign. Prior to KCTCS, Terri spent the majority of her marketing career in the restaurant industry. Her first position was with Kentucky Fried Chicken working in all aspects of the marketing department including new product development, promotions, field marketing, print advertising, and national advertising. While at KFC she had the opportunity to be project manager of the largest new product rollout in the company's history. After nine years with the company she left to become vice president of marketing and sales for Custom Foods, a customized food processor that specializes in the development and manufacturing of customized food products for the restaurant industry. In 2000 her life took an unexpected turn that led her to a quite surprising but more fulfilling career in public service. She briefly served as the executive director for communications for the Kentucky Transportation Cabinet before being called to serve in Governor Patton's communication office. It was while working for Governor Patton that she caught the higher education reform fever, particularly for the work being done at KCTCS. She feels blessed and fortunate to be working for the higher education institution that is the primary key to assisting the citizens on this state with achieving their dream of a well-educated quality of life.

3:15 pm – 4:45 pm Philanthropy – Salon D

Making the Ask

There is no absolute right way to solicit major gifts. There are, however, several characteristics common to successful solicitations. The most important of these will be discussed in an interactive, give-and-take session.

Thursday, December 8, 2011

3:15 pm – 4:45 pm Philanthropy – Salon D



Speaker: Rick Nahm, President, Cranbrook Educational Community. Frederick C. (Rick) Nahm is president of Cranbrook Educational Community (Bloomfield Hills, Mich.). He began his tenure at Cranbrook in August, 2001. Prior to joining Cranbrook, Nahm was senior vice president of Colonial Williamsburg Foundation and has served as president of Knox College (Galesburg, Ill.). He also has held various positions in both the corporate world and in higher education, including technical sales representative for Honeywell, Inc., vice president and general secretary at Centre College, and senior vice president for planning and development at the University of Pennsylvania. Nahm also

was Colonial Williamsburg's acting president from 1999 to 2000. Nahm has served on the boards and advisory committees of a wide variety of organizations focused on education, art and science, including Virginia Wesleyan University Board, Greater Williamsburg Area Performing Arts Council, Virginia Symphony Orchestra, and as chair of the Smithsonian's organizing committee for planning and development. He was recently a board member of the Cultural Alliance for Southeastern Michigan (CASM), Council for Advancement in Support of Education (CASE), and Detroit Public Television (DPTV). Nahm earned a bachelor's degree in chemistry from Centre College and a master's degree in chemistry from the University of Kentucky. Known for his love of music, especially rhythm and blues, Nahm has a record collection of more than 10,000 selections. He is married to Sandra, and they have five grown children and six grandchildren.

5:00 pm – 6:00 pm *Newcomers – Social*

Convention Center - Yesterday's Billiards – Bar & Grill

5:00 pm – 8:00 pm Dinner on your own

8:00 pm – Midnight *Special Event – Magnolia Room*

After dinner, come enjoy an evening of fun with your CASE KY friends & colleagues! We will have a full night of DJ Music and Music Videos, Minute to Win It Games, a Photo Booth and Pictures, Drink Tickets, Prizes, and More! *Hosted by KY Pro DJ and other partners*

Conference Agenda

Friday, December 9, 2011

7:30 am Registration Open – Area Top of Escalators

7:30 am – 9:00 am Continental Breakfast – Area Top of Escalators

9:00 am – 11:45 am Executive Management Session – Blackberry Lilly

“55 Actions for Extraordinary Success in Advancement”



Like all of us, Senior Advancement officers sometimes get burned out. Hear some fun stories and get some ideas on how to recharge your batteries and stay motivated for the important work you do!

Speaker: Dr. Linda Wise McNay, Partner, Alexander Haas. Linda’s professional background includes work with both higher and secondary education, the arts and human service organizations and has included work in capital campaigns, annual fund, planned giving, membership, strategic planning and organization development. Linda has lived and worked in Atlanta for more than 20 years. Most recently, she served as Chief Development Officer for the High Museum of Art leading its efforts to raise \$95 million to bring great art from the Louvre and China to the Atlanta community. During her tenure she also oversaw the execution of an endowment campaign, initiated the institution’s first full-time planned giving effort and increased the museum’s membership to a record 50,000. During this time Linda also served as national president of the Art Museum Development Association. Prior to the High, Linda served as Director of Advancement at Pace Academy, a K-12 private school in Atlanta. During her time at Pace, she oversaw the school’s largest and most successful capital fundraising campaign with a goal of \$15 million. The campaign was an overwhelming success, reaching goal ahead of schedule, under budget and with 95% parent participation and 100% faculty/staff participation. In higher education, Linda has held positions including Vice President of the Georgia Foundation for Independent Colleges; Executive Director of the Emory Challenge Fund at Emory University; Director of Development at the Georgia Institute of Technology and alumni and development roles at her alma mater, Transylvania University. A regular speaker and presenter at workshops and conferences and author of numerous articles for publication, her doctoral dissertation was entitled, “The Relative Cost Effectiveness of Three Direct Mail Techniques on Non-Alumni Prospects”. Linda earned her Doctorate in Philosophy of Higher Education from Georgia State University; a Master of Business Administration from the University of Kentucky; and a Bachelor of Arts degree from Transylvania University in Lexington, KY.



Speaker: Dr. Jennifer Wyatt, Assistant Professor of Human Development and Leadership, Murray State University and a Certified Professional Coach. Jennifer is an Assistant Professor of Human Development and Leadership at Murray State University and a Certified Professional Coach. She is the owner of Her Executive Coach, a coaching and consulting firm specializing in the professional development needs of individuals and organizations. Jennifer Wyatt boasts a diverse national corporate client registry including the industries of healthcare management, insurance, banking and finance, transportation, retail/spa, and education. Dr. Wyatt earned a Bachelor’s degree in Psychology and a Master’s degree in Educational

Friday, December 9, 2011

9:00 am – 11:45 am Executive Management Session – Blackberry Lilly

Psychology from the University of Mississippi, an Educational Specialist degree from Union University and a doctorate degree in Educational Leadership at Union University. She received her post-graduate coaching certification through the College of Executive Coaching in Santa Barbara, CA.

9:00 am – 10:15 am Breakout Session IV – Individual Tracks

9:00 am – 10:15 am Advancement Services – Crimson Clover Room

Breaking Silos and Developing Effective Collaboration Between Development Officers and Prospect Researchers

This session is a 'must' for development officers and prospect researchers. Incorrect perspectives, myths, and other misunderstandings threaten the successful collaboration necessary for increased success in a time of financial insecurity. Never before has collaboration between researchers and development officers been so necessary.



Vicky Martin, Director of Development at Indiana University Foundation. Vicky is Development Director at the Indiana University Foundation. Prior to accepting that role, she was Director of Research Management and Information Services at the IUF. Vicky has been in the field of development research for 23 years and continues to be involved in aspects of prospect research, primarily as a guest lecturer at Indiana University and at conferences and seminars. As development director, Vicky primarily supports the IU School of Library and Information Science. She also works with the annual 50-year class campaigns and supports other units at IU who need assistance with their development efforts. Vicky has been active with APRA International and APRA-Indiana for many years.

She completed three terms on the APRA-Indiana board, enjoying the roles of President, 1st Vice President, Program Chair, and Mentor Chair during the course of her tenure. She has also enjoyed a variety of volunteer roles with APRA International over the years. Vicky has been a speaker for CASE, AFP-Indiana Chapter, and is a regular guest lecturer addressing the subject of prospect research at various IU venues, such as the School of Library and Information Science, The Dove Fundraising Institute and nonprofit management classes. Vicky has been a regular speaker at the annual APRA International Conference, and is an invited speaker at conferences hosted by various APRA chapters. Vicky is co-author -- along with Kent Dove, Kathy Wilson and others -- of a book titled *Conducting a Successful Development Services Program*, published by Jossey-Bass. Most recently, Vicky authored the chapter on Prospect Research in the 3rd Edition of Hank Rosso's *Achieving Excellence in Fundraising*, also published by Jossey-Bass.

Friday, December 9, 2011

9:00 am – 10:15 am Alumni Relations – Bluegrass Room

Report Tracking, Moves Management and Information Flow Between Alumni Relations and Academic Units



Speaker: Rick Dupree, Assistant Dean of Development & Alumni Relations, Kent School of Business, Indiana University. Rick Dupree joined the Office of Development in July of 1996 as Executive Director, and became Assistant Dean with the union of the Development and Alumni offices in April of 2008. A senior development professional for 20+ years, Rick's extensive background in higher education, the performing arts, and the systems and metrics involved in the evaluation of fundraising professionals has made him a sought-after Speaker to and counsel for numerous non-profits in the U.S., Hungary and the United Kingdom. Prior to his post at Indiana, he served on the alumni/development staff at the University of Evansville and as Director of Major Gifts and Managing Director of Capital Campaigns at Michigan's acclaimed Interlochen Center for the Arts. Rick holds the BM in Performance ('80) with High Honors from the University of Evansville and is founding member and principal of "***Richard K. Dupree & Associates, LLC***".



Speaker: Rochelle Reeves, Director, Alumni Relations, Kent School of Business, Indiana University. Rochelle Reeves joined the Office of Alumni Relations at the Kelley School in 1999. Prior to being named director in 2006, she was responsible for many aspects of alumni relations activity – office management, chapters, career services, the launch of the Kelley apparel site, and working with students. She holds a Bachelor of Science in Public Affairs Management from the IU School of Public and Environmental Affairs and was Customer Service Manager at the Service Merchandise Company in Bloomington before joining the Kelley School. Her top priority is to build the Kelley Alumni Network into a nationally recognized benefit of the Kelley degree and ensure all 88,000+ alumni have the opportunities they seek for engagement, involvement, and investment.

9:00 am – 10:15 am Communications – Triple Crown Room

Sharing Real Stories of Real People Living Real Lives. The difference between shooting "at" or "with" someone: How to avoid drive-by shootings. And a 30 minute session on TLC – Timing, Light, and Color.



Speaker: David LaBelle, Lecturer, School of Journalism and Mass Communication, Kent State University. Dave began his photojournalism career at the Ventura County (California) *Star-Free Press* as a weekend sports shooter and lab man while still in high school. Throughout his 40-year career, LaBelle has been a photographer, editor, teacher and author and lecturer. He has worked for 20 newspapers and magazines in nine states, including the Ventura County Star, the Anchorage Times, the San Bernardino Sun-Telegram, The Chantute Tribune, the Ogden Standard-Examiner, The Sacramento Bee and the Pittsburgh Post-Gazette, where he was assistant managing editor for photography. LaBelle joined the faculty at Western Kentucky University in 1986 and taught photojournalism for more than a decade. In 1989, while at Western, LaBelle published the first edition of *The Great Picture Hunt*. LaBelle is also the author of the book *Lessons in Death and Life*, which was published in 1992 and deals with the ethics of photographing grief. In 2004, LaBelle taught

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9:00 am – 10:15 am Communications – Triple Crown Room

photojournalism at the University of Kentucky and advised the award-winning daily student newspaper the *Kentucky Kernel*. LaBelle's love for feature photography and his ability to hunt out feature ideas has helped him win numerous awards. At 19, he was the National Press Photographers Association Region 10 Photographer of the Year, an honor he repeated the next two years. He was runner-up to W. Eugene Smith for the first Nikon World Understanding award in 1974 and runner-up for the NPPA National Photographer of the Year award in 1979. In 1991, the National Press Photographers Association honored LaBelle with the Robin F. Garland Award for photojournalism education, and in 2002, the Photographic Society of America Inc. honored him with the International Understanding Through Photography award. The award judges said, "LaBelle's background and accomplishments in photography have contributed to greater understanding among people everywhere." LaBelle is known for his ability to speak and motivate others to do their best work; seven of his former students have won Pulitzer Prizes. After two years freelancing in California and Tennessee, LaBelle now lives with his family in Kent, OH where he teaches and directs the photojournalism program at Kent State University.

9:00 am – 10:15 am Philanthropy – Salon D

Planned Giving in 3D: Decoding Gift Opportunities for Your Donors

You don't need special glasses or a magic decoder to help your donors see the benefits of planned giving! It isn't as mysterious as you may think, and these types of gifts will be increasingly important to the future of your institution. Most planned giving donors are consistent annual donors as well, so everyone should benefit from this session. We will explore planned giving concepts as a solution to common problems faced by your donors. Understanding why and when to ask specific questions, every frontline professional can feel comfortable facilitating these conversations and thus creating strategies to assist donors in achieving their philanthropic and financial goals.



Speaker: Diana Kinslow, Director of Planned Giving, Western Kentucky University.

Diana has more than 16 years of development experience in higher education. A graduate of Transylvania University, she has led annual fund and major gift programs at The Culinary Institute of America in both New York and California, the University of Louisville School of Dentistry, and now serves as Director of Planned Giving at Western Kentucky University. Her career path has allowed her to become proficient in many aspects of fund development within a variety of organizational structures. She believes strongly in education and has a proven track record of building relationships and helping donors contribute in a way that is meaningful to them. In her current role, Diana assists alumni and friends in leaving a legacy through bequests, gift annuities, trusts, and other special philanthropic resources. She has been active in CASE KY for ten years and is a member of the Partnership for Philanthropic Planning of Kentuckiana and the Southern Kentucky Estate Planning Council.



Speaker: Kelly Wesley Taylor, J.D., Partner and Legal Counsel, Trek Advancement.

Kelly has a proven track record helping organizations deepen and sustain relationships to facilitate philanthropy. Her professional experience includes annual fund and planned giving fund development for Harvard University. She is experienced in dealing with tax aspects of charitable giving and has served as a philanthropic planning advisor to many individuals and organizations. While serving as the chief fundraising officer and administrator for a regional academic cancer center, she built a sustainable, multi-

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9:00 am – 10:15 am Philanthropy – Salon D

faceted development program while completing an \$80 million capital campaign. Overseeing every aspect of a development enterprise, Kelly broadened the scope and the reach of the fundraising efforts on every front, i.e., foundation and corporation giving, special events, implementation of an annual fund, volunteer management, and major gift development and planned giving. She received her B.A. from the University of Kentucky and J.D. from the University of Louisville. Kelly has served on a number of community and national volunteer boards as both a grant maker and fund seeker.

10:15 am – 10:30 am Break

10:30 am – 11:45 am Breakout Session V – Individual Tracks – “Best Practices”

10:30 am – 11:45 am Advancement Services – Crimson Clover Room

Providing Leadership to Advancement

Advancement Services Best Practices helps bring leadership solutions to our workplace. This session showcases the increasing and important role of our work in delivering results that make a difference. Come explore the top themes of best practices in Advancement Services and discuss the opportunities ahead for new innovation.



Speaker: Lynne Becker is the Interim Director of Development Management Systems at Southern Methodist University in Dallas, TX. Her experience spans 30 years and also includes large public institutions, private institutions and non-profit associations. Her background includes advancement services, annual giving, donor relations, events, research, alumni affairs, prospect research, campaign planning, training and board relations. Lynne is active in CASE, receiving their Crystal Apple Award for Outstanding Teaching. She is also a member of AASP, the Association of Advancement Services Professionals, and is chair of the Best Practices Sub-Committee on Management and a member of both the Nominations Committee and Ethics Committee.

10:30 am – 11:45 am Alumni Relations — Bluegrass Room

Alumni Outreach from a President’s Perspective

As Alumni Relations professionals, we know that our institution’s President, Provost, and Deans are our most valuable asset in reaching out to our alumni. But what do these leaders need from us? How can we best support their efforts and maximize their effectiveness as they meet and interact with alumni? Tori Murden McClure recently celebrated the first anniversary of her inauguration as President of Spalding University, an institution with a decidedly atypical alumni base. Known as a scholar, author, world adventurer, humanitarian, and speaker, President McClure will reflect on a new leader’s learning curve for

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10:30 am – 11:45 am Alumni Relations — Bluegrass Room

interacting with alumni. She will also discuss how her experiences as a trustee and alumna of several other educational institutions have equipped her for alumni outreach as a university president.



Speaker: Tori Murden McClure is President of Spalding University, Louisville, Kentucky. Spalding University offers 27 degree programs at the bachelor, master, and doctoral level, to more than 2,000 students. She holds a Bachelor of Arts from Smith College, a Master of Divinity from Harvard University, and her juris doctorate from the University of Louisville's Louis D. Brandeis School of Law. In 2005, she earned her master of fine arts in writing from Spalding University. Her non-fiction book *A Pearl in the Storm* was published by Harper-Collins in 2009. A passionate world adventurer and humanitarian, Ms. McClure is best known as the first woman and first American to row solo across the Atlantic Ocean. She was also the first woman and first American to travel over land to the geographic South Pole, skiing 750 miles from the ice shelf to the

pole. An avid mountaineer, Ms. McClure has climbed on several continents. She is a fully certified emergency medical technician in both urban and wilderness areas, and is a graduate of the National Outdoor Leadership School (NOLS) where she currently serves as the chair of the board of trustees. While Ms. McClure became president of Spalding University in July 2010, she was no stranger to the institution as she is a graduate of the MFA in Writing program and a former administrator. From 2004 through 2009 she served as the vice president of external relations, enrollment management and student affairs. A longtime resident of Louisville, Ms. McClure has served in a variety of other professional capacities prior to arriving at Spalding University. She remains involved in a variety of community leadership positions and serves on several boards of directors. Tori Murden McClure is passionate about the transforming power of education and inspires individuals, and particularly students at Spalding, to seek greatness through learning and to use their talents and skills to contribute to their own communities.

10:30 am – 11:45 am Communications — Triple Crown Room

Changing the Name from a College to a University

Changing its name after more than 100 years of history, the University of Pikeville ushered in a new era, setting a course to become the leading university in Central Appalachia. "Becoming UPIKE" is the story of the transition to university status.



Speaker: Lucy Holman, Assistant Vice President for Public Affairs, University of Pikeville. Lucy is responsible for directing the public relations, marketing and communications efforts for the university's College of Arts and Sciences and the Kentucky College of Osteopathic Medicine. In addition to more than 10 years of experience in higher education, Holman has worked as a reporter and editor at newspapers in Kentucky and Texas and as a communications specialist in county government. An avid political observer, she has served as a consultant and writer for political campaigns. Holman is a graduate of Pikeville College and Morehead State University.

Friday, December 9, 2011

10:30 am – 11:45 am Communications — Triple Crown Room



Speaker: Bruce Parsons, Director of New Media and Assistant Professor of Film and Media Arts, University of Pikeville. A native of Pikeville, Ky., Bruce Parsons is an Assistant Professor of Film and Media Arts and the Director of New Media at the University of Pikeville. Before working at UPIKE, he served as a filmmaker and educator at the Appalshop, a non-profit media arts center located in Whitesburg, Ky. Parsons studied fine arts at Morehead State University and received an MFA from the Ohio University School of Film. His work focuses on community-based media, design, new media, and political discourse.

10:30 am – 11:45 am Philanthropy – Salon D

The Bigger Picture (in 3D) – the Past, Present, and Future of Philanthropy

We're energized and we're excited; we're eager to get back to work and put our conference ideas into practice. It is also timely, however, to take a step back and look at the bigger picture. We're not talking about what we'll do next month or next year. We're talking *really big* picture – what we will do in five years, ten years and beyond. Dr. Richard Trollinger, a scholar of philanthropy and veteran of more than four decades in the field, will be on hand to provide context and history to a hands-on discussion about the past, present and future of philanthropy. The canvas is blank, so come armed with your paintbrush. The floor will be open for questions and participation is highly encouraged.



Speaker: Richard W. Trollinger, Ph.D., is vice president for college relations at Centre College. Richard has served in his current position since 1994. Previously, he served as an administrator at Emory & Henry College in Virginia for 23 years. His positions there included vice president for development and external affairs and, in 1992, interim president. In 2000, he co-chaired the steering committee for the Vice Presidential Debate that Centre hosted, and he is serving in that capacity again for the 2012 Vice Presidential Debate. Centre's most recent capital campaign, which he directed, exceeded its \$120 million goal by nearly \$50 million. His doctoral dissertation, which examines the impact of transformational gifts on colleges and universities, was recognized by the Council for the Advancement and Support of Education (CASE) with its top award for research relating to the role of philanthropy in advancing higher education institutions. His interest in high-impact philanthropy was again put to use in a 2009 study, "Time is of the Essence: Foundations and the Policies of Limited Life and Endowment Spend-Down" that he and Dr. John Thelin of the University of Kentucky conducted with support from The Aspen Institute. He holds degrees from Emory & Henry College (B.A.), Vanderbilt University (M.Ed.), Indiana University (M.A.), and the University of Kentucky (Ph.D.).

Noon – 1:30 pm Closing Lunch/Awards Presentation – Salon ABC

Join us as we celebrate our achievements from the past year. There were 156 fantastic entries for this year's awards. See who will be recognized as Grand Champion and who will receive Awards of Special Merit and Excellence. Awards presentation will be followed by a short CASE Kentucky business meeting where we will elect the 2012 leadership of the Board.

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