

THURSDAY, December 6

2007 Northern Kentucky CASE KY Conference Schedule Cincinnati Airport Marriott, Hebron, Kentucky December 6-7, 2007



7:30 am to 9:00 am

Breakfast

8:00 am to 9:30 am

Registration

7:30 am to 9:00 am

Newcomer's Session – Cincinnati Room

Whether you are a newcomer to the field of advancement or a seasoned veteran, you will be able to gain many tools that will increase your effectiveness in our field. Come join us as we listen and learn from the experts and take advantage of the opportunity to visit with others in the advancement industry from across the state of Kentucky.

Speaker: **Susannah Denomme**, Director of Development, University of Kentucky. Moderator: **Remona Edenfield**.

9:00 am to 10:00 am

Opening General Session – Ballroom

"A CASE for Success"

Governor Martha Layne Collins, Governor of Kentucky from 1983-1987. She is noted for establishing education reform and economic development as critical policies and for achieving success on both fronts. She will present a welcoming and exciting presentation as we begin our "CASE for Success!"

Governor Martha Layne Collins grew up in Shelby County, Kentucky, graduated from The University of Kentucky and was a schoolteacher until 1970. She then assumed a role as Coordinator of Women's Activities in a number of political campaigns, leading her into public office. Collins served as Clerk of the Supreme Court of the Commonwealth of Kentucky from 1975 to 1979, where she guided the office through the most far-reaching changes in the history of the state's judicial system.

Having been elected to a term as Lieutenant Governor from 1979 to 1983, Collins sat as president of the State Senate and as both Vice-Chair and Chair of the National Conference of Lieutenant Governors. As Lieutenant Governor, Collins gained critical experience in leadership serving as acting Governor 25% of her term. She was then elected as the first (and only) female Governor of the Commonwealth in 1983.

During her tenure as Governor (1983-1987) she is noted for establishing education reform and economic development as critical priorities and for achieving success on both fronts. Passage of a \$300 million education reform package and creation of record jobs and investment were highlights of the Collins administration. She was also instrumental in bringing Toyota Motor Manufacturing and many other international supply companies to Kentucky. As a result of the outstanding relationships she developed, Governor Collins was named Honorary Consul General of Japan in Kentucky and continues to serve in this position.

After leaving the Governor's office, Martha Layne Collins served as president of St. Catharine College for six years, as the Executive-in-Residence at the University of Louisville's School of Business, and as the Director of the International Business and Management Center at the University of Kentucky's Carol Martin Gatton College of Business and Economics. Governor Collins was a Harvard University Fellow in the John F. Kennedy School of Government at the Institute of Politics in Cambridge, Massachusetts. In 1998, Governor Collins became Executive Scholar in Residence at Georgetown College, Georgetown, Kentucky, where she developed the Center for Commerce, Language and Culture.

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2004 marked a new direction for Governor Collins when she was invited to join the staff of the Kentucky World Trade Center as the new Chair & CEO. She stepped into this role officially in January 2005. Governor Collins is married to Dr. Bill L. Collins and enjoys the company of their five grandchildren.

10:00 am to 10:15 am

Break

10:15 am to 11:30 am

Session One

Alumni – Room I

“One Thing Leads to Another - Growing Active Alumni: Programming Partnerships”

Growing active alumni does not start after graduation. Hear how Denison broadened its reach of alumni efforts by partnering with other campus entities (e.g. admissions, career services, student activities, annual fund) to provide multiple touch points for prospective students, current students and recent alumni.

Speakers: **Sandy Ellinger**, Director of Alumni Affairs, Denison University; **Steve Crawford**, Associate Director of Alumni Affairs, Denison University. Moderator: **Chris Schill**.

Sandy came to Denison in 1992, working both in the Annual Fund and the President’s Office, before joining the Alumni Affairs team in 2002. Her career took her from teacher to full-time mom to marketing professional to development officer. She oversees all aspects of the office including alumni travel programs, alumni council and budget management as well as monitors most effective office logistics. Sandy is reliving her college heydays by serving as the live-in house mother for a Denison sorority. She received her BA in French from Denison.

Steve came to Denison University and the field of development in May 2005 after working 14 years in undergraduate admissions and first year experience programs at Capital University, Texas Christian University and The Ohio State University. He currently oversees Denison’s regional programming, homecoming and the student-alumni association as well as monitors consistent use of the Alumni Affairs logo, which annoys his Alumni Affairs colleagues. He dreams of hosting a game show and in his spare time, Steve proudly dismantles his house, under the guise of home improvement, and has only 51 ongoing projects yet to complete. He received a BA in public relations from Capital and an MA in higher education/student affairs from Ohio State.

Advancement Services – Room VI

“The Anatomy of a Major Gift”

How research assisted in obtaining one of the largest gifts in UC history.

Speaker: **Craig Kahn**, Director, Research Services, University of Cincinnati Foundation. Moderator: **Mimi Ward**.

Craig is Director of Research Services for the University of Cincinnati Foundation (UCF). He joined UCF in 1994 as Assistant Director of Research and was part of their successful \$300 million campaign. He was named Associate Director of Research in 1999 and Director of Research Services in 2005. In his current position, he manages a staff of three researchers and one data entry/file clerk, assigns research requests, manages the prospect tracking system, handles corporate/foundation research, assists with the preparation for a future campaign, helps with the maintenance of the Kintera data and manages the distribution of proactively identified prospects.

Craig has been a member of the Association of Professional Researchers for Advancement (APRA) and the Ohio Prospect Research Network (OPRN) since 1989. He has served on the OPRN Board of Directors since 1993. Since 2003, he has served as OPRN’s newsletter editor and is also currently serving as Vice President of Development. Craig graduated from Miami University with a BA in Political Science and also did graduate work in Political Science at Miami.

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Philanthropy – Room V

“Hot Topics in Higher Education Fundraising: Legal Issues and Estate Planning”

This session will explore current and important legal issues impacting fundraising on behalf of higher education. Specific topics will include the impact of the Pension Protection Act of 2006, non-cash gifts, planned giving, dealing with donor restrictions, charitable pledges, donor advised funds, gift receipts, protecting donor privacy, development for fraternities, charitable endowments, scholarship program guidelines and more! Questions will be encouraged.

Speaker: **Phil Purcell, JD, MPA, CFRE**, Vice President for Planned Giving and Endowment Stewardship, Ball State University Foundation. Moderator: **Doug Draut**.

Phil Purcell currently serves as Vice-President for Planned Giving and Endowment Stewardship at the Ball State University Foundation. Formerly, he served as Director of Gift Planning for the Central Indiana Community Foundation (Indianapolis, IN) where he created and directed the Planned Giving Resource Center serving area charitable organizations. Phil is an attorney and member of the American and Indiana State Bar Associations. Phil received his B.A. degree from Wabash College in 1981 (*magna cum laude*) and his J.D. and M.P.A. degrees (*with honors*) from Indiana University in 1985.

Communication – Room II

“Taking Your Writing to the Next Level”

How do you spice up that ad copy, press release or feature article? Steve Kissing will provide proven tips from the world of advertising and book publishing to help make your copy sing!

Speaker: **Steve Kissing**, author of the novel “Running from the Devil,” columnist, Cincinnati magazine, copywriter and U.S. Presidential candidate. Moderator: **Rob Pasquinucci**.

Steve Kissing has spent more than 15 years working in ad agencies and public relations firms where he has always had to write some to earn his keep. An early adopter of Internet-driven public relations tactics, Kissing moved to the creative side of the marketing communications business. He cut his creative teeth at Barefoot advertising in Cincinnati where he spent three years as a copywriter, winning several dozen creative awards. He then served as an associate creative director of Internet Services at HSR Business to Business, where he was later promoted to creative director. His interesting and unexpected work for clients, as well as his monthly magazine column, “Odd Man Out,” have led more than one to speculate that Kissing may qualify as an outsider artist himself.

11:30 am to 11:45 am

Break

11:45 am to 1:15 pm

Opening Luncheon – Ballroom

“Higher Education: New Century – New Challenges – Unfinished Business”

Gordon Davies, Director, National Collaborative for Postsecondary Education Policy. Mr. Davies is the former President of Kentucky's Council for Postsecondary Education.

Gordon Davies served as the Director of the State Council of Higher Education for Virginia from 1977 until 1997, and as President of the Kentucky Council on Postsecondary Education from 1998 until 2002. He has taught at Yale University, Richard Stockton State College, and the Teachers College of Columbia University. He was a founding dean of Richard Stockton State College in New Jersey.

Born in New York City, he is a Navy veteran and worked for several years in computer sales for the IBM Corporation. His earned degrees are from Yale University in English (BA) and the Philosophy of Religion (MA, PhD).

He has recently directed a project to improve state higher education policy making. Funding for the project was provided by The Pew Charitable Trusts.

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1:15 pm to 1:30 pm

Break

1:30 pm to 2:45 pm

Session Two

Alumni – Room I

“Mighty Oaks From Little Seeds Grow – Student Philanthropy Programs”

A session on student philanthropy programs, featuring the Penn State student giving program. How do we plant the seeds from which mighty donors will grow? They don't generate much return today, but will they tomorrow?

Speaker: **Lauren Steinberg**, Assistant Director, Annual Giving, Penn State University. Moderator: **Chris Schill**.

Lauren Steinberg coordinates programs that focus on recent graduate giving and student awareness. In 2005, she worked with a group of students to begin the Penn State Student Philanthropy Council, a student group working to create a culture of philanthropy on campus. Prior to her current position, Lauren spent four years as a fundraiser for the American Lung Association.

Advancement Services – Room VI

“Technology in Advancement Services”

Speaker: **Jeff Baynham**, Manager of Advancement Services, Western Kentucky University. Moderator: **William Skaggs**.

Jeff Baynham is the Manager of Advancement Services at Western Kentucky University. He began his career in institutional advancement in 2005 as Assistant Director for Alumni Relations and Annual Giving at WKU. Prior to working at WKU, he was a manager for a local bank in Bowling Green. Jeff is a 2002 graduate of WKU with a BS in finance.

Philanthropy – Room V

“Foundation Perspectives”

Foundation Panel: **Dennis Riggs**, Community Foundation of Louisville; **Deborah George**, Ashland, Inc.; **Karen Kruer**, NKU Foundation. Moderator: **Remona Edenfield**.

Dennis Riggs has been President and CEO of The Community Foundation of Louisville, Inc. in Louisville, Kentucky since 1991. Under his leadership, the Foundation's asset base has increased from \$43 million to over \$250 million. The Foundation granted over \$29 million in fiscal year 2007. Mr. Riggs has been recognized nationally and internationally as a leader in the community foundation field. He served two terms on the board of the national Council on Foundations, and two terms as national chair of the community foundation field. In 2005, he was one of five U.S. community foundation leaders appointed as a Fellow of the Transatlantic Community Foundation Fellowship, an exchange program created by a partnership of the King Baudouin Foundation of Belgium and the United States, and The German Marshall Fund of the United States, with support from the Charles Stewart Mott Foundation. The three-week program enables senior staff of community foundations from the United States and Europe to exchange ideas and experiences.

Mr. Riggs received his B.A. degree from Bellarmine College in 1965. Over the last 40 years, he has served in several community leadership and nonprofit capacities, including: as the first full-time executive director of the Louisville Fund for the Arts, as Vice President of Bellarmine University, and as Vice President of the Louisville Presbyterian Theological Seminary. Long considered a leading fund development professional, Mr. Riggs is sought by organizations and professionals as a speaker and consultant on strategic planning, organizational development, fundraising and family philanthropic planning. He has provided leadership to numerous local nonprofit organizations, including: as a three-term chair of CARITAS Health Services; as president of the Rotary Club of Louisville, and as a board member of the Greater Louisville Sports Commission and the Louisville Olmsted Parks Conservancy. In addition, Mr. Riggs was instrumental in the formation of the Louisville Donors Forum, an association of foundations and funders in the Louisville

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Metro area. He also served in private business as a partner in the executive search consulting firm of Fleming Associates, a precursor to TASA International.

Mr. Riggs currently serves as Chair of the Greater Louisville Project, a coalition of private funders who have developed and are executing Louisville's plan for community excellence beyond merger; as Vice Chair of the Merton Institute for Contemplative Living; and as a board member of the National Foundation to Support Cell Transplant Research, Leadership Kentucky, and the University of Kentucky Nonprofit Leadership Initiative Advisory Council. Mr. Riggs is a retired member of the officiating staff of the National Football League (NFL) and currently serves the NFL as League Officiating Observer and Scout.

Mr. Riggs was recognized for his community leadership and service by receiving the 2007 Women 4 Women Heart of the Community Award. In 2006, he received the St. Francis Xavier Award from St. Xavier High School. He was also a recipient of the 1996 Louisville Community All-American Award and a Distinguished Alumni Award from Bellarmine University (1994). He and his wife Kitty have been married for 43 years and have three adult children and eight grandchildren.

Since January 1, 2004, Deborah S. George has been responsible for managing Ashland Inc.'s corporate contributions program. She has 33 years service with Ashland, the last 16 of which have been in Communications and Corporate Affairs. She received a 2005 Ashland Inc. Chairman's Award for excellence in community development for the Ashland Inc. employee disaster assistance program she developed and implemented in 2004. In 2006, she opened the employee giving campaign to ten agencies, and implemented a Dollars for Doers program for employees. In 2007, Debbie relocated to Northern Kentucky and accepted the added responsibilities of executive assistant to the vice president, Human Resources and Communications.

She holds an Associate in Applied Science from Ashland Community College, and is a life-long learner in the truest sense of the word. She has taken classes at four universities across the commonwealth, collecting 96 college credit hours, and continues to work toward a Bachelor's degree. She attained certification in corporate community involvement after completing the management development program of the Carroll School of Management at Boston College.

Debbie is a member of the Association of Corporate Contributions Professionals, and serves on their environmental group. She and her husband, Bill, live in Burlington, Ky.

Karen Kruer, a Northern Kentucky native, comes to the NKU Foundation from the University of South Florida Foundation in Tampa, Fla., where she has served as director of development for special gifts and campaigns for the past two years.

Prior to assuming her position at USF, Kruer served for nine years in leadership and management positions in the Greater Cincinnati/Northern Kentucky non-profit sector. For four years she served as executive director for the Grailville Education & Conference Center in Loveland, Ohio. She then for five years as director of regional funds with The Greater Cincinnati Foundation, where she was responsible for The Northern Kentucky Fund and The Clermont Community Fund. Kruer also was founder and president of The Mediation Alternative in Edgewood, Ky., for 10 years. This private mediation and conflict resolution practice was devoted to resolving divorce, family and organizational conflict. Kruer was instrumental in developing mediation programs throughout the Commonwealth and was co-founder and first president of the Mediation Association of Kentucky.

Kruer received her B.A. in education from the College of Mt. Joseph in 1979 and her J.D. from the University of Denver Sturm College of Law in 1986. A member of the Kentucky Bar Association, she has fond memories of her service as an adjunct professor at Chase Law School from 1990-97. Kruer and her husband of 28 years, Tom Kruer, have a home in Edgewood. Their daughter is a graduate student at NYU and their son is a first-year student at New College of Florida in Sarasota.

Communication – Room II

"Must-have Technologies for the PR Office"

In this interactive session, Jay Buckner will talk about and demonstrate a few of the most valuable and easy-to-use technologies he has used to quickly get the job done. In addition, the session will be live podcasted with participants taking an active role in using some of the technologies and producing a final product, a flash-based audio slideshow ready to be placed online. You will also get tips on recording audio interviews, photography and audio editing. Finally, please bring your most valuable technologies that are smaller than a breadbox. At the end of the presentation we'll have a brief roundtable session for you to present your own must haves.

Speaker: **Jay Buckner**, Public Relations Manager, Berea College. Moderator: **Joan McKinney**.

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Jay Buckner is the public relations manager at Berea College, where he leads many of the college's electronic communications strategies. Prior to joining Berea, he worked in healthcare public relations after his first job out of college as a television news journalist. Buckner is a 1993 graduate of Morehead State University. Since that time he has earned 14 CASE awards while producing what he calls "rocket art." "PR is not exactly rocket science, but it is an art with a plan," he says.

2:45 pm to 3:00 pm

Break

3:00 pm to 4:15 pm

Session Three

Alumni – Room I

"Turning a Local Community Into a Campus Community"

Alumni Associations can get the job done alone, but the job is done better with support from the local community. Hear how Western Kentucky University has improved Homecoming because of a partnership with alumni and community organizations.

Speaker: **Ginny Hensley**, Associate Director of Alumni Relations and Annual Giving, Western Kentucky University. Moderator: **Chris Schill**.

Ginny Hensley is the Associate Director of Alumni Relations and Annual Giving at Western Kentucky University. Ginny graduated from WKU in 1997 and began working in Community and Campus Events in 1998. In 2000, she began a career in advancement as the Assistant Director of Alumni Relations and Annual Giving and managed the university's phonathon program. Today, she is responsible for Homecoming, Coming Home, the Growing Up Red Legacy Program, the lifelong learning program, Alumni College, as well as the alumni chapter network. Ginny is married to Drew, a 1999 WKU graduate, and they have two children, Reed, age 4 and Hope, age 1.

Advancement Services – Room VI

"Gift Processing"

Gift processing is obviously an essential function of any Advancement operation. During this session, we will dive fairly deep into the ins and outs of processing gifts. We will touch on topics such as fund management, gift types, receipting, and adjustments to name a few. Come prepared with questions (and answers!) and plan to engage in a productive session!

Speaker: **John W. Smith**, Associate Director of Advancement Services, Tennessee Technology University. Moderator: **Mimi Ward**.

John began his career at Tennessee Tech in July 1995 as an Analyst in University Advancement. In 2003, prospect research was moved under John's supervision and a Research Associate was hired. John led the conversion of Tennessee Tech's Advancement system to Raiser's Edge in 2005. During that same year, the Gifts/Records and Stewardship Center was moved under John. Currently, John supervises five full-time staff members.

John received his BS in Computer Science in 1994 and an MBA in 1998. He is happily married and has two children, David, age 7, and Lindi, age 5. In his spare time he enjoys golf, hunting and working on his wife's family farm.

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Philanthropy – Room V

“Hello Muddah, Hello Faddah...”

Ever wish you had more support from parents past and present? One look around a campus parking lot, tells you the potential is there. Explore strategies for building and expanding support from parents.

Speaker: **Mary Beth Neiser**, Director of Annual Giving, Centre College. Moderator: **Doug Draut**.

Mary Beth Neiser develops and oversees the Annual Fund and Parent Fund at Centre College. She focuses on strategies to maximize both participation and dollars raised through direct mail and email, telemarketing, and personal solicitations. Prior to her current position, Mary Beth spent five years working in development, most recently as Director of Annual Giving at the University of Rochester.

Communication – Room II

"Working with the Media When a Crisis Unfolds"

How much information do you really control when the national media comes to your campus in the wake of tragedy? We'll put your media management skills to the test using scenarios from the April 16, 2007 shootings at Virginia Tech and explain how The Roanoke Times covered the incident.

Speaker: **Shay Barnhart**, an editor with The Roanoke Times who helped direct the paper's coverage of the April 16 shootings at Virginia Tech. Moderator: **Joan McKinney**.

Shay Barnhart is an assistant editor for the New River Valley Bureau of The Roanoke Times and oversees higher education coverage, among other things. The bureau is 10 minutes from Virginia Tech, and Barnhart directed the paper's initial response to the April 16 shootings. A graduate of the University of Missouri School of Journalism, she has worked as a reporter and editor for the past 15 years at papers in Illinois, North Carolina, Virginia and Dubai, United Arab Emirates. She has been with The Roanoke Times since 1999, and spent five of those years as the police and court reporter in the New River Valley Bureau.

6:00 pm to 10:00 pm

Special Event - A Night on the Riverfront

Wrap up your Thursday evening by joining your CASE colleagues and vendors for a night at the ball park! Enjoy food, fun and music in the home of the Reds overlooking Cincinnati's riverfront nightscape. The first bus will depart from the front of hotel at 6:15 pm, and return for the second group around 6:45 pm. Return trips will be made beginning at 9:30 pm until the final call at 11:00 pm. Don't forget to sign up on your registration form!!

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7:30 am to 9:00 am

Breakfast

7:30 am to 9:00 am

Senior Professionals Session – Cincinnati Room

"Leading Where It Counts"

This presentation will review the leadership characteristics of four University/College Presidents in relation to their successful fundraising activities. The discussion will emerge out of a review of the transformational and transactional leadership attributes each of these presidents practice on a daily basis. The interviews with Dr. Freeman Hrabowski(UMBC), Dr. Gordon Gee(Ohio State), Dr. Rita Bornstein(Rollins College), and Dr. John Casteen(University of Virginia) provide rich insights into nine behaviors that enhance their ability to secure major gifts and transform their institutions of higher learning.

Speaker: **Danny Nicholson**, Vice President of University Advancement, Coastal Carolina University. Moderator: **Cara Meade**.

EDUCATION:

2001 – 2006 Ph.D., Higher Education Administration – University of South Carolina

1999 – 2001 Master of Education, emphasis in Higher Education Administration – University Of South Carolina

1981 – 1984 Bachelor of Arts, Communications – Charleston Southern University

HONORS AND AWARDS:

2007 GREZEBACH AWARD WINNER - CASE INTERNATIONAL - TOP DISSERTATION IN FUNDRAISING

Boston Marathon, finished in 2000 and 2007

Paul Harris Fellow, Rotary International – 2000

PROFESSIONAL EDUCATION AND PRESENTATIONS:

2007 HARVARD INSTITUTE FOR EDUCATIONAL MANAGEMENT GRADUATE

2007 FACULTY MEMBER - NEWCOMERS IN DEVELOPMENT – NASHVILLE, TN

2006 University of Tennessee – Chattanooga – “How Alumni Boards Work With Capital Campaigns”

2006 CASE Newcomers Conference, San Diego, California – Faculty member

2006 Inaugural Address for Communication Majors, Coastal Carolina University – “Leadership and Communication”

2001 CASE District III Conference, Atlanta, Georgia – “Corporate and Foundation Fundraising – Professional Schools”

1999 Keynote Speaker for Sewanee College’s Annual Fund Leadership Conference

1998 CASE District III Conference, Atlanta, Georgia, “How Coker College Earned Top 10 Honors in the Nation in Alumni Giving

8:00 am to 9:00 am

Roundtable Discussions – Ballroom

A CASE for a Successful Young Alumni

Hosted by: **Deidra Fajack**

Deidra Fajack has served as the Director of Alumni Programs and Licensing at Northern Kentucky University for the past five years. She came to NKU after a nearly twenty year career at the University of Cincinnati including nine and a half years of experience in the alumni field and 10 years in student affairs. Deidra's experience with and knowledge of the alumni field has enhanced NKU's alumni programs with new and innovative activities. Deidra has a BS degree from Morehead State University and a M.Ed. degree from the University of Cincinnati.

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A CASE for a Successful Stewardship and Donor Relations program

Hosted by: **Marci Hicks**

Marci Hicks is the Associate Director for Advancement for the University of Kentucky College of Agriculture. Hicks joined the college advancement team in December 2005 after serving 5 years as a major gifts officer and the Director of Regional Gifts for the University. Prior to joining the University of Kentucky, she held various positions at Midway College completing her nine-year career at the historic women's college as the Director of Development.

During her tenure at Midway College, Marci was involved in every aspect of alumnae relations and fund-raising. From organizing fund-raising events such as the black-tie Equine Gala to the annual scholarship golf tournament, Hicks worked with numerous volunteers, donors, and trustees to raise awareness and funds for the College. Additionally, she worked closely with the Vice President for Institutional Advancement in the planning, implementation, and conclusion of two capital campaigns while at Midway; the Little Memorial Library---which represented the institution's first major campaign--- and the Anne Hart Raymond Mathematics, Science, and Technology Building. While at UK, Hicks served as a major gift officer assigned to Architecture and Engineering and later became the director for this department during the first-ever, comprehensive capital campaign for the University. She not only served as a field person for the campaign, Hicks also served as an advisor to colleges with respect to campaign management and planning during her tenure. Currently as the senior development officer for the College of Agriculture, her role is to continue the success of the College's campaign and to provide leadership for the \$20 million Equine Education and Research Campus as well as other college-based campaigns such as the Arboretum Children's Garden.

Marci received her bachelor's degree in Agricultural Economics from the University of Kentucky in 1987. In 2001, she completed her masters in Higher Education Administration with an emphasis in Institutional Advancement from Vanderbilt University and is in the final stages of writing her dissertation with hopes of receiving her doctorate in Higher Education Administration by December 2008 from the University of Kentucky. Hicks continues to volunteer with many organizations. She is a sustaining member of the Lexington Junior League. During her active membership with the Junior League, Marci served as the chairwoman for the 1998 Junior League Horse Show. She has been on the boards of the Lexington Ballet, the Bluegrass Community Foundation, Bluegrass Swim Team and the Kentucky 4-H Foundation.

A CASE for Successful Foundations

Hosted by: **Karen Kruer**

Karen Kruer, a Northern Kentucky native, comes to NKU from the University of South Florida Foundation in Tampa, Fla., where she has served as director of development for special gifts and campaigns for the past two years. Prior to assuming her position at USF, Kruer served for nine years in leadership and management positions in the Greater Cincinnati/Northern Kentucky non-profit sector. For four years she served as executive director for the Grailville Education & Conference Center in Loveland, Ohio. She then for five years as director of regional funds with The Greater Cincinnati Foundation, where she was responsible for The Northern Kentucky Fund and The Clermont Community Fund. Kruer also was founder and president of The Mediation Alternative in Edgewood, Ky., for 10 years. This private mediation and conflict resolution practice was devoted to resolving divorce, family and organizational conflict. Kruer was instrumental in developing mediation programs throughout the Commonwealth and was co-founder and first president of the Mediation Association of Kentucky. Kruer received her B.A. in education from the College of Mt. Joseph in 1979 and her J.D. from the University of Denver Sturm College of Law in 1986. A member of the Kentucky Bar Association, she has fond memories of her service as an adjunct professor at Chase Law School from 1990-97. Kruer and her husband of 28 years, Tom Kruer, have a home in Edgewood. Their daughter is a graduate student at NYU and their son is a first-year student at New College of Florida in Sarasota.

A CASE for Successful Campaign

Hosted by: **Tom Hiles**

Tom Hiles serves as Western Kentucky University's Vice President for Institutional Advancement. Hiles came to Western in 1998 as Vice President for Development and Alumni Relations. In August 2001, he took on additional responsibilities, including public relations, marketing, publications, and media relations. Hiles now supervises 65 employees, who support the university's mission to become one of the best comprehensive universities in the United States. Hiles and his staff planned and successfully completed Western's first comprehensive campaign, which culminated in 2003 with \$102.3 million in commitments. Hiles and his team are now in the quiet phase of a second comprehensive campaign. Under Hiles's tenure, endowment contributions to Western Kentucky University have increased from \$25 million to \$95 million, and cash donations have increased from \$3.5 million to \$18.5 million. Additionally, membership in the President's Circle – individuals who give \$1,000 or more annually – has grown from 350 members to more than 2,000 members. Hiles also serves as Executive Director of Western Kentucky University Foundation, which has doubled its assets during the past two years. Additionally WKU is in the quiet phase of a \$200 million campaign that will be announced in September of 2007. \$85 million has been raised to date.

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Hiles began his career in higher education at DePaul University, where he served from 1985 to 1988 in the offices of Annual Giving and Corporate and Foundation Relations. From 1988 to 1995, he served at The University of Maryland at College Park as Director of Development for the College of Behavioral and Social Sciences, Director of Corporate and Foundation Relations, and Director of Prospect Tracking/Assistant Director of *Campaign for Maryland*. During his tenure as Director, corporate and foundation giving rose from \$7 million to \$16 million. At Rice University, he first served as Director of Development for Strategy and Prospect Management from 1995 to 1996. He then served as Director of Campaigns from 1996 until 1998, during which time he directed the successful \$32.3 million *Center for Nanoscale Science and Technology Campaign*. Hiles was also responsible for coordinating strategy and planning for Rice's \$500 million *Next Century Campaign*.

Hiles received his undergraduate degree from Graceland College, and he completed his master's degree in Education Administration at DePaul University in 1990. Hiles serves on the board of Hospice of Southern Kentucky and is a member of the Greenview Hospital Board and the Bowling Green Noon Rotary. He is married to Sara Shipley Hiles and has two sons, Scott and Ryan.

A CASE for Successful Small Shop Fundraising - Independent and Parochial Schools

Hosted by: **Chuck Willenbrink**

Chuck Willenbrink is Director of Advancement for St. Xavier High School, Louisville, Kentucky, where he leads a team that oversees development, alumni relations, special events, and public relations. Previously, he was Senior Director of Major Gifts and Planned Giving for Volunteers of America of Kentucky and Tennessee; Vice President for Development with the National Multiple Sclerosis Society of Kentucky and Southern Indiana; and Field Director for the Boy Scouts of America, Lincoln Heritage Council. Willenbrink is Past-President of the Association of Fundraising Professionals of Greater Louisville and former Co-Chair for Leave A Legacy of Kentuckiana, a community-wide effort, led by volunteers, to encourage individuals to leave a bequest or an estate gift to a nonprofit organization of their choice. Willenbrink is a native of Louisville, Kentucky. He graduated from the University of Notre Dame in 1981 with a Bachelors degree in American Studies. He and his wife Kathleen have four children - Zach, Caitlin, Elizabeth and Rebecca.

A CASE for Successful Philanthropic Issues focusing on Women

Hosted by: **Remona Edenfield** and **Amelia Crutcher**

What's all the buzz about – just how powerful are our alumnae and women donors? Why is everyone taking notice of the significance of women's involvement and giving? Who controls the purse strings? What types of programs and events engage women and motivate them to give? These are a few ideas about what we can discuss.

A member of the University of Kentucky development team, Remona Edenfield is leading the strategy to establish a women's philanthropy program at UK. She also manages campaign initiatives for many academic and town-and-gown programs. She works with many of UK's top women donors and staffs several fundraising committees.

Amelia Crutcher is resident of Cincinnati, Ohio and a retired consultant who dedicates her time to impacting fundraising in the arts, education and community parks. She serves on numerous boards and leads various fundraising, brainstorming and operational committees in the Greater Cincinnati area. Amelia is a University of Kentucky journalism graduate and serves on the College of Arts and Sciences Advisory Board and the UK Development Council.

9:00 am to 10:15 am

Session Four

Alumni – Room I

"What's the Plan?"

Do you have a long range plan for your alumni program? Do you need one? We will explore the reasons you must have a long range plan, and the methods use by the Berea College Alumni Relations to recently accomplish this seemingly daunting task.

Speaker: **Mae Suramek**, Director of Alumni Relations, Berea College. Moderator: **Chris Schill**.

Mae is a 1995 Berea College graduate who serves as Berea's Director of Alumni Relations. In her current role, she is responsible for developing and maintaining an annual operations and communications plan for the Alumni Association while providing complete programmatic and financial oversight. She provides leadership and support for alumni fundraising goals, projects, activities and

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stewardship while conducting clear assessment strategies and benchmarking for major programmatic areas. Prior to returning to Berea, she spent seven years working in city and state level Human Rights/Relations organizations where she implemented in-depth programs and initiatives promoting advocacy, multiculturalism, and diversity awareness for businesses, consumers, and community groups. Mae holds a B.A. in Psychology from Berea and an M.A. in Community Counseling from Eastern KY University. She has also completed graduate coursework in Women's Studies at the University of Kentucky.

Philanthropy/Advancement Services – Room V/VI

"Stewardship and Donor Relations"

Speaker: **Leslie Atkinson**, Director of Donor Relations, William and Mary. Moderator: **Randy Pratt**.

Lesley Atkinson was born in Utica, New York and grew up in Lynchburg, Virginia. She received her B.A. in French from the University of Mary Washington in Fredericksburg, Virginia. After graduation, Lesley worked for a French consulting firm in Washington, D.C. She and her husband have lived in several states in the Midwest and Northwest where she did volunteer work and raised her family. She joined the Development Office at Purdue University in 1991 working as an assistant to the Vice President for Development during their capital campaign. She became the Director of Gift Acknowledgement and Stewardship there in 1996. In June 2002, Lesley joined the College of William and Mary Development Office as Director of Donor Relations. She is responsible for presidential acknowledgements, endowment reporting, donor recognition, stewardship, and event planning.

Communication – Room II

"Getting the Most Out of Your Photo Shoot"

You've convinced your boss and your boss's boss to spend big bucks on hiring a professional photographer. What now? How to get the most out of your investment and how to negotiate your agreement to make sure the photos shot are really "yours."

Speakers: **Greg Rust**, Photographer, Xavier University. Moderator: **Rob Pasquinucci**.

Greg Rust uses a subtle mix of anthropology, professional experience and intuition to create photographs that lay bare the underlying thread of humanity common to all people. His masterful use of color, light and composition produce an almost-instant bond of familiarity between subject and viewer, regardless of setting or geographical location. A self-described cultural chameleon, Rust received a bachelor's degree in anthropology from Northern Kentucky University in 1978 and has done extensive study on Native American culture. In addition, he has served as director of photography for Xavier University for more than 20 years, work that has taken him on assignment to Nicaragua, Nepal, El Salvador, Guatemala and Ghana. Rounding out his considerable experience, Rust also works as the official photographer for both of Cincinnati's major-league sports teams—the Reds and Bengals. His work has been shown widely and has been recognized with a number of national and regional awards. Rust's time away from photography is devoted to his family. He volunteers at his daughters' school, helps out with 4-H projects and raises horses on his Pendleton County, Kentucky, farm, thus passing on five generations of farming heritage to his children.

10:15 am to 10:30 am

Break

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10:30 am to 11:45 am

Session Five

Alumni – Room I

"Beyond Black Tie Too"

This session will help you redesign your rubber chicken dinners into a well-camouflaged marketing tool. Under the influence of the experience economy, special events are one of the hottest advancement tools of the decade. We will discuss the secrets for the creation of Wow events and learn about marketing trends that will enhance your success. You will gain ammunition to help you fight for event resources to do events that have strategic results. Join us for a WOW!

Speaker: **Geni Greiner**, Director of Special Events, Purdue University. Moderator: **Chris Schill**.

Greiner is a 16 year veteran of business-theatre. She began her career in conference management, served as the Director of Development Events for Iowa State University, Director of Donor Relations for Kansas University Endowment Association and currently is the Director of University Special Events for Purdue University. Her career includes three completed campaigns, raising over 3.7 billion dollars.

Geni is well-versed in integrated marketing and donor cultivation. Her events are best known for their WOW factors and ability to immerse an audience. She coordinates over 140 special events and meetings each year. In a four-year period, she increased donor attendance by 50 percent and coordinated a national alumni tour with record-breaking attendance.

As the Director of Donor Relations, she led a team, which re-engineered the Stewardship reporting function for Kansas University. The enhanced process generated a 70 percent increase in funding in just two years.

Greiner joined Purdue in July 2003. Purdue has 46,000 students and just completed a 1.7 billion dollar campaign. Greiner's responsibilities include managing a team of seven staff executing over 183 events last year. Homecoming, advancement events, academic-driven lecture series, college-specific events and Presidential tours.

She graduated with a B.S. in Public Relations from Northwest Missouri State University and attended the Institute for Organizational Management at Notre Dame University.

Philanthropy – Room V

"Major Gift Fundraising for the Small Shop"

How to get your major gift program started and moving forward as you juggle all your varied responsibilities within a small development office.

Speaker: **Elizabeth Branner**, Washington and Lee. Moderator: **Randy Pratt**.

Elizabeth Outland Branner has been in fundraising since 1994, primarily in higher education. She is in her ninth year at Washington and Lee School of Law where she is the Associate Director of Law School Advancement, focused primarily on major gifts. Elizabeth has a B.A. in English and German from Wake Forest University and a M.B.A. from the College of William and Mary. She is married to Wade Branner who is Associate Athletic Director at Virginia Military Institute and is the mother of two children Harrison (9) and Margaret (6).

Communication – Room II

"Beyond PDF purgatory: Taking Your Magazine Online"

An online magazine is a great way to extend the reach of your magazine, offer multimedia contents and engage your readers in completely new ways. We'll discuss the rationale behind going online, best practices for developing an online magazine, and how to draw visitors to the site when it's done. Information will be offered in a case-study format.

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Speakers: **Rob Pasquinucci**, Director of Alumni Communications, Northern Kentucky University, and **Scott Levine, Ph.D.**, Vice President for Research, RH/The Agency. Moderator: **Jim Nilson**.

Rob Pasquinucci currently serves as the editor of Northern, the alumni magazine, and other alumni publications, at Northern Kentucky University. He is a graduate of Ashland University with a bachelor of arts in journalism and is currently working on his master's degree in communication at NKU. Before coming to NKU in 2005, he worked at Northlich, HSR Business to Business, Mansfield News Journal, and Phi Delta Theta headquarters.

Scott H. Levine, Ph.D., vice president for research at RHB, The Agency, holds degrees from The George Washington University, the University of Arizona and American University. At the latter, he earned his doctorate in higher education administration. Levine has worked with dozens of colleges and universities to turn research results into compelling communications efforts. This breadth of experience endows him with a unique perspective on the higher education landscape, with special emphasis on development and admissions.

11:45 am to 12:00 pm

Break

12:00 pm to 1:30 pm

Closing Lunch - Ballroom

"From Rockefeller Plaza to CASE KY: Philanthropy and Southern Universities Yesterday and Today"

Between 1912 and 1940, two Kentuckians, Abraham Flexner and Sydnor Harbison Walker, played starring roles as program officers for Rockefeller-funded foundations, granting to southern universities what would be millions of dollars today. Flexner, who worked with General Education Board for sixteen years, dispensed more funds to higher education than other program officer of the era and Walker, one of the only female officers in a major foundation, granted funds for the development of the social sciences first through the Laura Spelman Rockefeller Memorial beginning in 1924, and then later through the Rockefeller Foundation until 1939. What might these Kentuckians say about southern universities today? This presentation briefly considers higher education through the historical lens of Flexner and Walker's philanthropic experience, using their past to identify key challenges for southern higher education today.

Speaker: **Dr. Amy Wells**, Associate Professor, University of Mississippi

Amy E. Wells is an associate professor of higher education in the department of Leadership and Counselor Education at the University of Mississippi. Dr. Wells joined the faculty of the University of Mississippi in 2004, after serving in her first academic appointment at the University of New Orleans. She completed her Ph.D. in Educational Policy Studies (Higher Education) at the University of Kentucky in 2001, and holds a B.A. from Transylvania University in Political Science and a Master's degree in Student Personnel from Kent State University.

Wells' research interests include the history of higher education, Rockefeller philanthropy to southern universities, and co-curricular student organizations in campus life. Wells is co-authoring a book on the history of research universities in the South from 1890-1990 with Professor John Thelin of the University of Kentucky. Her research has been supported by the Rockefeller Archive Center in Tarrytown, New York and the University of Mississippi where she received recognition by the Office of Research and Sponsored Programs as a member of the Faculty Research Fellows Class of 2006.

Her publications have appeared in the *History of Higher Education Annual*, *Academe*, and *Urban Education*. One volume where her historical scholarship appears, *Women and Philanthropy in Education* edited by Andrea Walton (2005), received the 2006 John Grezebach award, given annually by the Council for the Advancement and Support of Education (CASE) for "outstanding published research on philanthropy." Most recently, Wells along with Fran Huelhs and Noah Drezner co-edited a volume with Marybeth Gasman (University of Pennsylvania) and Andrea Walton (Indiana University) on *Philanthropy, Volunteerism, and Fundraising* for the Association for the Study of Higher Education (ASHE) Reader Series (forthcoming, 2007).

CASE Kentucky Award Recognition

CASE KY Business (Elect officers, financial report)