LIFECYCLE OF A DONOR

(SPONSORED BY IWAVE)

Donor lifecycle management strategies can help you develop and retain donors and increase your fundraising success. Effectively managing donor expectations at each step of the giving process is important for inspiring loyalty and instilling trust in your donors. So what does your donors' lifecycle look like? And more importantly, are your strategies positioning you for donor growth over the duration of that lifecycle?

- Storytelling for Every Channel and Every Audience
- It's Always About the Next Gift
- Top 10 Ways to Build a Sustainable Source of Future Revenue through a Planned/Legacy Gifts Program

STORYTELLING FOR EVERY CHANNEL AND EVERY AUDIENCE

Storytelling has reached buzzword-level status for fundraising and communications professionals of all stripes. But how do you translate this momentum into a seamless and results-oriented workplan within your organization? This session will tackle that question, bringing together Brad Dunn, Web and Digital Engagement Director at the Field Museum, and Melissa Berliner, Vice President at Campbell & Company. These two leaders will discuss where storytelling should live within an organization and how to adapt stories for different channels and audiences. From social media to print, Gen Z to baby boomers, the conversation will tackle storytelling for every channel and every audience. During the second half of the session, attendees will have the chance to ask questions and workshop storytelling ideas to show how a singular message can be translated across an organization to create maximum impact.

LEARNING OUTCOMES:

By the end of this hybrid fireside chat-workshop session, attendees will:

- Learn how to embed storytelling within their organizations, including who should oversee it and who should coordinate it
- Understand how to reach different generations with storytelling, including Gen Z, millennials, Gen X, baby boomers, and the Silent Generation
- Understand how to adapt and coordinate storytelling for different communications channels, including face-to-face meetings with donors, social media, email, video, podcasts, website/blogs, direct mail, and events
- Practice applying the concepts learned to their own organizations

PRESENTERS:

Melissa Berliner, Vice President, Campbell & Company
Brad Dunn, Web and Digital Engagement Director, Field Museum
Kashif Shaikh, Co-Founder and Executive Director, Pillars Fund

Melissa Berliner, Vice President, Campbell & Company

Melissa has the ability to quickly identify the core challenges facing clients and develop tailored, innovative strategies to address them. As a Vice President with Campbell & Company, Melissa Berliner enjoys developing tailored, innovative strategies to address her clients' core challenges and opportunities. Collaborating with individuals who have a variety of personalities and skill levels, Melissa's clients appreciate her ability to build consensus among organizational leadership, staff and volunteers to drive impact. *continued ...*

Melissa's work spans multiple sectors, including human services, education, and arts and culture. She is also a seasoned guest speaker and lecturer on a variety of fundraising topics, and has spoken at conferences hosted by the Association of Fundraising Professionals, Women in Development, Planned Parenthood, Chorus America, the National Legal Aid and Defender Association, Loyola University, DePaul University, and Columbia College.

Prior to coming to Campbell & Company, Melissa managed fundraising programs at the Columbia Art Museum, Victory Gardens Theatre, and Steppenwolf Theatre. She currently serves as Past President of the Chicago Chapter of the Association of Fundraising Professionals. In this role, she Chairs the Committee on Directorship and Vice-Chairs the Faces of Philanthropy Awards Luncheon.

Brad Dunn, Web and Digital Engagement Director, Field Museum

Brad oversees interactive design, audience engagement, and digital content development for the web, social media, and other digital channels. Over 20 years, he has crafted user- and story-driven engagements across digital and real-world spaces for live audiences, smartphone-wielding consumers, smiling children, intoxicated cruise ship passengers, and upper eastside arts funders.

Kashif Shaikh, Co-Founder and Executive Director, Pillars Fund

Kashif Shaikh is the Co-Founder and Executive Director of Pillars Fund, an organization that invests in and amplifies the talents, narratives, and leadership of American Muslims. Under Kashif's leadership, Pillars has grown from a volunteer-led community fund to a fully-staffed foundation whose work has been covered by The New York Times, Buzzfeed, and Fast Company, among others. To date, Pillars has invested over $4 million in nonprofits working with and alongside American Muslim communities. With over 13 years of experience in the philanthropic sector, Kashif is a leading voice in the field of philanthropy and the important role it plays in empowering vulnerable communities.

Prior to launching Pillars, Kashif was a Program Officer at the Robert R. McCormick Foundation where he managed a portfolio of over $5M and helped scale some of the most promising non-profits in Chicago working at the intersection of racial justice, poverty and education. Additionally, Kashif managed the Foundation's corporate partnerships and helped develop corporate social responsibility strategies for the Chicago Tribune, Chicago Blackhawks, and the Chicago Bulls. Kashif's career began at the United Way of Metropolitan Chicago, where he advanced key strategies to engage the organization's largest corporate partners.

He currently serves on the Board of Directors of the Peabody Awards and was named by Crain's Chicago Business as one of its "40 Under 40" changemakers in 2017. A Cincinnati native, he holds a B.A. from Ohio State University and a Master's Degree from Northwestern University.

IT'S ALWAYS ABOUT THE NEXT GIFT

It's great to get that new gift. Celebrate! And then start thinking about what needs to happen to ensure you get the NEXT gift. While donor acquisition will always be essential to our development programs, we need to address donor retention with equal passion and skill. The consequences to losing a donor are greater than the drop in revenue it represents. By all means let's get them – and KEEP them. Join us for an engaging session that looks at best practices in data analysis and strategy development so that your numbers are always increasing – dollars and donors.

LEARNING OUTCOMES:

Participants in this session will learn…

- what the data reveals about your donors and your management of them.
- how to establish a donor management protocol focused on long-term relationships.
- what donors want and need to stay connected – and invested – in your cause.

PRESENTERS:

Liz Fieweger, Development Director, St. Therese Chinese Catholic School
Mary J. Foley, Managing Director, Mission Advancement, Christian Brothers Services

Liz Fieweger, Development Director, St. Therese Chinese Catholic School

Liz Fieweger is the Development Director at St. Therese Chinese Catholic School, a two-time National Blue Ribbon Award winner. Brought on to help position the school for expansion to a second campus, Liz elevated the development platform to attract an increasing number of gifts in her three years there. She also helped facilitate the largest group donation in school history, including working with the donor to double their initial annual investment in less than three years.

Liz has spent the second half of her career in development for non-profits, including as Director of Individual Giving for Horizons for Youth, an organization dedicated to providing education, mentoring, and enrichment opportunities to students. There, she focused on programs to help maintain and grow the individual donor base, resulting in an overall increase of over 20% in annual giving by individuals.

Mary J. Foley, Managing Director, Mission Advancement, Christian Brothers Services

Mary J. Foley is managing director at Christian Brothers Services and oversees the Mission Advancement and Catholic School Management divisions. Mary brings 35+ years of experience to the not-for-profit world and offers a wealth of strategic leadership skills and insights to the educational, religious and social service arenas.

Mary has worked with hundreds of not-for-profits, internally as a director of development, at the board level, and through a wide variety of consulting engagements. She has raised hundreds of millions of dollars through capital campaigns, annual fund appeals and ever-expanding advancement initiatives for organizations large and small.

Mary is a frequent presenter at NCEA, CASE, AFP, ICSC, DOJ, ASPM and other professional development conferences that like to use initials.

TOP 10 WAYS TO BUILD A SUSTAINABLE SOURCE OF FUTURE REVENUE THROUGH A PLANNED/LEGACY GIFTS PROGRAM

In an environment where many development professionals wear many hats and are asked to do more with less time and budget support, it seems counterintuitive to invest time in a program that—on the surface—doesn't reap immediate rewards. But, studies show that by inviting our donors to make legacy gifts, our organization can benefit—now and in future years. In fact, many donors who make bequests increase their outright giving in the subsequent 5 years by 75% and IRS data shows that bequests are the largest type of gifts, averaging 2.74 times a donors' total lifetime giving. So how can we invest minimal time and resources into a program to create sustainable revenue for our organizations? And boost our donors' current giving all at the same time? Join this session to learn more from the practical and legal perspectives, receive tools and templates to take back to your organizations and jump start your program immediately.

LEARNING OUTCOMES:

By the end of this hybrid fireside chat-workshop session, attendees will:

- Understand how to simply and effectively launch or reboot a planned/legacy giving program, with limited time and budget
- Learn how a planned/legacy giving program complements and boosts your major and annual giving program
- Learn how best to work with attorneys during the gift planning and receiving process
- Receive a toolbox of templates to immediately start building a simple infrastructure for a planned/legacy gifts program
- Learn numerous cost-effective marketing and stewardship strategies for promoting and cultivating a new/revitalized planned/legacy gifts program
- Acquire and practice simple discussion prompts to use when speaking with donors
- Discuss a few case studies with fellow participants

PRESENTERS:

Julie Captain, Senior Director, Major Gifts, Shirley Ryan AbilityLab
Kirk A. Hoopingarner, Partner, Quarles & Brady, LLP

Julie Captain, Senior Director, Major Gifts, Shirley Ryan AbilityLab

Julie Captain, Senior Director, Major Gifts at Shirley Ryan AbilityLab, has revitalized and leads the organization's planned giving program, in addition to generating major and principal gifts. Previously, she invested nearly 19 years at Northwestern Medicine in a variety of roles, most recently serving as Director of Development and Planned Giving at Northwestern Medicine Lake Forest Hospital, co-leading their $150 million *Our Legacy. Our Future.* campaign.

Julie's professional forte is in creative gift planning and has been heavily involved with the Chicago Council on Planned Giving throughout her career. She joined the Board of Directors in 2007, has participated on numerous committees and served as its President from 2011-2013. Julie also served on the Evanston Community Foundation board from 2010 – 2013. She completed Leadership Evanston in 2011.

Kirk A. Hoopingarner, Partner, Quarles & Brady, LLP

Kirk is a partner in the Chicago office of the national law firm of Quarles & Brady LLP, where he practices in the firm's Estates, Trusts and Wealth Preservation and Tax Exempt Organization groups. For over 35 years Kirk has concentrated his practice on all facets of wealth planning, trust and estate administration and philanthropy.

Kirk has been actively involved in the Chicago area philanthropic community, having served as President of the Corporate Responsibility Group of Greater Chicago, Chair of the Evanston Community Foundation, Chair of the McGaw YMCA of Evanston, and President of the Evanston Township High School Foundation Board. He is currently serving on the professional advisor committees for the Ann and Robert H. Lurie Children's Hospital of Chicago Foundation, the Chicago Zoological Society, and the Lincoln Park Zoological Society. He has also been serving as a Director of The Davee Foundation.

Kirk serves on the Editorial Advisory Board of Planned Giving Today, is an adjunct professor in the Northwestern University Law School LLM tax program where he is co-teaching a course on tax exempt organizations, and is on the Center of Influence Advisory Council for US Trust and the Advisory Council for American Endowment Foundation. He is also a fellow of the American College of Trust and Estate Counsel where he serves on the Charitable Planning and Tax Exempt Organization Committee.