



## **THE Foundations Seminar 2011**

Welcome to Indianapolis and the 21<sup>st</sup> Annual Foundations Seminar!

For over two decades THE Foundations Seminar has provided industry leading educational content, invaluable networking opportunities and the chance to celebrate our successes together. We also have an opportunity to grow and challenge one another in a positive and exciting environment.

We look forward to spending time with you learning from the experts and each other, as we strive to build our foundations and achieve excellence in the “field” of development.

Our foundations have moved past youthful stages and into sustained periods of growth and increasing depth. The ability of our foundations to make a difference in the lives of undergraduate students and communities across the country has never been greater. We have realized much of this potential and are growing in our ability to succeed like never before.

Like other conferences, you are responsible for your performance. We hope you will take advantage of our many educational sessions including, the Pre Conference Seminar, top-tier keynote speakers, nearly 40 educational sessions and ample networking time. The resources are at your disposal and we look forward to hearing your feedback.

Let us know if we might be of assistance. Have a terrific experience and enjoy the seminar!

Bonnie Payne  
Seminar Co-Chair  
Executive Director  
Gamma Phi Beta Foundation

Brad Hastings  
Seminar Co-Chair  
President  
Sigma Nu Educational Foundation

## THE Foundations Seminar 2011 - Schedule at a Glance

### Thursday, August 18, 2011

1:00-4:00pm	Pre-Conference Seminar: Darrell Godfrey, Advancement Resources Transformational Philanthropy for Transformational Organizations	Discovery B
4:00-5:00pm	First Timer's Orientation	Studio Five
5:00-6:30pm	Welcome Reception Sponsored by: RuffaloCODY	Cosmopolitan Foyer

### Friday, August 19, 2011

8:00-8:30am	Registration Continental Breakfast	Cosmopolitan Foyer Cosmopolitan AB
8:30-9:30am	Penelope Burk Results of the NICF/Cygnus Research Initiative Sponsored by: OmegaFi	Cosmopolitan AB
9:45-10:45am	Vendor Visits & Break Sponsored by:	Cosmopolitan Foyer
10:45am-11:45am	Educational Session Block I	
12:00pm-1:45pm	Luncheon & NICF Update Sponsored by: Dinsmore & Shohl	Cosmopolitan AB
1:45pm-2:45pm	Educational Session Block II	
2:45pm-3:15pm	Vendor Visits & Break	Cosmopolitan Foyer
3:15pm-4:15pm	Educational Session Block III	
4:30pm-5:30pm	Educational Session Block IV	
6:30pm	Awards Reception Sponsored by: UBS Financial Services	Cosmopolitan Foyer
7:30pm	Awards of Distinction Dinner Sponsored by: Baker & Daniels	Cosmopolitan AB

**Saturday, August 20, 2011**

7:30am	Registration	Cosmopolitan Foyer
7:30am-8:15am	Award Winners Breakfast Sponsored by: Aria Communications	Cosmopolitan AB
8:15am-9:15am	General Session Transforming the Nonprofit Sector Jeff Mason, Vice President Social Solutions Sponsored by: Pursuant/Ketchum	Cosmopolitan AB
9:15am-9:30am	Vendor Visits & Break	Cosmopolitan Foyer
9:30am-10:30am	Educational Session Block V	
10:40am-11:40pm	Educational Session Block VI	
11:50am-12:50pm	Educational Session Block VII	

## **2011 NIC Foundation Supporting Partners**

**Please make a special effort to thank those organizations that make up the NICF Alliance Partners.**

### **Gold Alliance Partners**

**Aria Communications** – Saturday Morning HOT Breakfast

**OmegaFi** – Friday General Session

**The Pursuant Group** – Saturday General Session

**Willow Marketing** - THE 2011 Seminar Logo & Graphic Design

### **Silver Alliance Partners**

**Baker & Daniels** – Awards of Distinction Dinner

**Capstone Advancement Partners** – Volunteer Track

**Copilevitz & Canter, LLC** - Friday Breakfast

**Dinsmore & Shohl, LLP** – Friday Luncheon

**Fund Raising Counsel, Inc.** – Friday Morning Networking Break

**Gabriel Group** – Program Book

**Goelzer Investment Management** – Saturday Networking Break

**Harris Connect** –

**MJ Insurance** – Executives Track

**Pennington & Company** – Nametag Lanyards

**Patriot Software** – Staff Track

**Robinson, Bradshaw, & Hinson** – Legal Track

**RuffaloCody** – Welcome Reception

**UBS Financial Services** – Awards Banquet Reception

### **Bronze Alliance Partners**

**Computer System Innovations** – Conference Bags

### **Seminar Sponsors**

## **2010-2011 NIC Foundation Leadership Team**

### **NICF Board of Directors**

President: Ken File (Delta Tau Delta Foundation)  
Secretary: Scott Himself (Baker & Daniels)  
Treasurer: Kendra Lewis (Alpha Xi Delta Foundation)  
Tony Smercina (Pursuant/Ketchum)  
Jen Pendleton (Kappa Alpha Theta Foundation)  
Dave Schumacher (Delta Upsilon Foundation)  
Julie Cretin (Alpha Gamma Delta Foundation)  
Brad Hastings (Sigma Nu Educational Foundation)  
Ben Nicol (Phi Kappa Psi Foundation)

### **THE Foundations Seminar Planning Committee**

Bonnie Payne (Gamma Phi Beta Foundation), Co-Chair  
Brad Hastings (Sigma Nu Educational Foundation), Co-Chair & Board Liaison  
Deanna Long (RuffaloCODY), Alliance Partner Liaison  
Kathy Williams (Phi Mu Foundation)  
Terry Turman (Alpha Tau Omega Foundation)  
Ashley Woods (Sigma Chi Foundation)

### **NIC Foundation Staff**

Peter Smithhisler, President & CEO  
Ben Pendry, Vice President for Advancement

## THE Foundations Seminar 2011 - Detailed Agenda

### THURSDAY, AUGUST 18, 2011

**1:00pm-4:00pm**      Pre-Conference Workshop      Discovery B

#### **Transformational Philanthropy for Transformational Organizations Darrell Godfrey**

This three-hour dynamic workshop for fraternity/sorority volunteers and leadership introduces participants to a new understanding of the donor development process and the role of fraternity foundations. Participants learn the roles, skills, and approaches for Transformational Philanthropy:

- Encourage the creation of big goals
- Carry the vision into the community
- Discover prospective donors' stories that match the organization's vision
- Create connections: donor to fraternity
- Invest time and financial support in the vision for the fraternity/sorority

Participants also explore their own connections to the fraternity/sorority and re-evaluate their own philanthropy in terms of what they would like to accomplish with their money that would be valuable to them.

**4:00pm-5:00pm**      First Timer's Orientation      Studio Five

**5:00-6:30pm**      Welcome Reception  
Sponsored by: RuffaloCODY      Cosmopolitan Foyer

### FRIDAY, AUGUST 19, 2011

**8:00 AM**  
**Registration Opens**      Cosmopolitan Foyer

**Continental Breakfast**      Cosmopolitan AB  
Sponsored by: Copilevitz & Canter LLC

**8:30-9:30AM**  
**THE Foundations Seminar Opening General Session**      Cosmopolitan AB  
Sponsored by: OmegaFi

#### **NICF / Cygnus Research Initiative:**

A collaborative and interfraternal effort to research the attitude, motivations, and interest of  
fraternity and sorority foundation donors

**Presented by Ms. Penelope Burk, Cygnus Research**

**9:45-10:45AM**

**Vendor Visits & Morning Break**

Sponsored by: The Fund Raising Counsel, Inc.

**Cosmopolitan Foyer**

**FRIDAY, AUGUST 19, 2011**

**EDUCATIONAL SESSION – BLOCK I**

**10:45-11:45AM**

**LEGAL TRACK – Charitable Solicitation Compliance**

**Studio One**

**Nathan Thomas, Attorney, Copilevitz & Canter, LLC**

**Dianne Bailey, Attorney, Robinson Bradshaw & Hinson**

The presentation will focus on fundraising state compliance issues fraternities, sororities and their respective foundations face. Approximately 40 states require charitable organizations to register with a state regulatory agency (usually with the state's attorney general's office or secretary of state's office, depending on the state) prior to engaging in any solicitations for contributions. In addition, approximately 45 states require registration for professional fundraisers that solicit on behalf of charitable organizations and fundraising counsel that consult, manage, or advise charities with respect to the solicitation of contributions. The good news is that fraternities and sororities (and other fraternal organizations) are exempt from the registration requirements in some states. The presentation will explore the state registration requirements and, more specifically, the applicable exemptions available to fraternities and sororities and making sure once an organization is exempt that it stays within the confines of the applicable exemption.

**Follow-up Session – Cygnus Survey Results (Repeated in Block 2)**

**Discovery**

**Penelope Burk**

**Slam Dunk – March Madness Marathon**

**Cosmopolitan C**

**Kathy Williams, Executive Director, Phi Mu Foundation**

**Kathy Curtin, Development Consultant, Phi Mu Foundation**

SLAM DUNK- MARCH MADNESS MARATHON A 31 DAY TOURNEY THAT NETTED 400 NEW DONORS- 172 LAPSED DONORS- \$112,000 Tired of your same old annual fund drive? Results getting stagnant? How about adding some excitement to your campaign! Join Kathy Williams and Kathy Curtin of Phi Mu Foundation for an entertaining hour and dig into their latest concept: March Madness Marathon (M3). Hear how their virtual campaign netted 400 new donors, 172 lapsed donors re-engaged and over \$112,000 raised at a cost of less than 10 cents per dollar....all in only 31 days! Everyone loves a little March Madness!

**Annual Giving: Ask for the Money**

**Cosmopolitan D**

**Greg Bader, Dir. Of Individual Giving, Denison University**

**Mark Bauer, President & CEO, Lambda Chi Alpha Foundation**

All of the professional stewardship, events, and prompt thank yours we do will NOT bring most gifts. This session will emphasize ASKING and ways to do it.

**Grassroots Fundraising For Your Foundation & Philanthropy**

**Vision**

**Steve Good, Director of Education & Technology, Phi Delta Theta**

In the world of philanthropy, every Greek organization has three things: 1) A Foundation, 2) A philanthropic cause that they support and 3) members who are motivated to make a difference. This program dives into the emergence and importance of the grassroots fundraising movement in today's connected world. As online social tools and the philanthropic nature of millennial continue to permeate our organizations, Greek foundations have the unique opportunity to capture their fundraising power of their members. Doing this can benefit both the mission of your Foundation and your supported philanthropic organization. Phi Delta Theta's Iron Phi program will be used to show how this strategy is currently in place and succeeding.

**12:05-1:45PM**

**Luncheon & NICF Update**

**Cosmopolitan AB**

Sponsored by: Dinsmore & Shohl, LLP  
Annual business meeting of the NIC Foundation

**FRIDAY, AUGUST 19, 2011**  
**EDUCATIONAL SESSION - BLOCK II**  
**1:45-2:45PM**

**LEGAL TRACK – Annual Legal Update**  
**John Christopher, Attorney, Dinsmore & Shohl LLP**  
**Sean Callan, Attorney, Dinsmore & Shohl**

**Studio One**

The legal update will focus on taxation and related legal matters affecting men's and women's fraternity and sorority foundations. This year's legal update presentation will cover a broad range of topics, including issues related to educational housing grants, the current status of the Collegiate Housing and Infrastructure Act, other legal and regulatory developments and the redesigned IRS Form 990, including what we've learned from the first filing and additional changes made to the 2009 Form 990. As always, John and Sean welcome questions and hope to facilitate an interactive discussion of the tax and legal issues currently on the minds of foundation leadership.

**Follow-up Session – Cygnus Survey Results (Encore)**  
**Penelope Burk**

**Discovery**

**VOLUNTEER TRACK – Capstone**  
**Frank Byrne, Capstone Advancement Partners**

**Cosmopolitan C**

**PLANNED GIVING – Creating Your Program From Scratch**  
**David Carico, Vice President, OmegaFi**  
**Beth Knott, Chi Phi Foundation**

**Cosmopolitan D**

You recognize that you need to get in the game and create a Planned Giving program – now what? Where in the world do you start? What resources do you need? How do you market your program? What is your audience? Don't be overwhelmed! David and Beth have been in your shoes, and they'll share with you the steps they took to build the Planned Giving programs for the Kappa Alpha Order Educational Foundation and Chi Phi Educational Trust.

**YOUNG ALUMNI – New Ideas for a New Generation**  
**Greg Bader, Director of Individual Giving, Denison University**

**Vision**

Young alumni are the future of giving to any organization. This session will address ways to acquire and retain young donors to your foundation. This program will highlight new approaches in higher education fund raising to attracting giving by young alumni.

**FRIDAY, AUGUST 19, 2011**  
**EDUCATIONAL SESSION - BLOCK III**  
**3:15-4:15PM**

**LEGAL TRACK – Start Early So You Can Help More**  
**Scott Himself, Partner, Baker & Daniels**  
**Katy Ruhl, Attorney, Baker & Daniels**

**Studio One**

You exist for only one purpose: to support the educational and charitable work of your fraternity or sorority. But the IRS imposes a number of limits. And those limits are sometimes difficult to understand and to explain to your board and your fraternity. We will address techniques to maximize funding by working more closely with your fraternity or sorority at an earlier stage—while it is still designing the programs it wants you to help fund. These programs include leadership conferences; chapter consultants; reimbursement of headquarters staff time; housing grants; housing loans; etc. Starting earlier not only helps maximize funding. It can also reduce the time staff and counsel need to review grant requests. Also, grant guidelines and form grant applications can achieve some of the same



benefits. What broader benefits can you achieve through early, intentional collaboration? Could it also help you achieve creative synergies and foster broader understanding between your foundation and fraternity?

**FRIDAY, AUGUST 19, 2011**  
**EDUCATIONAL SESSION - BLOCK III**  
**3:15-4:15PM**

**PLANNED GIVING - Don't Defer:**

**Discovery**

**A Tailored Planned Giving Plan that Works**

**Gary Reed, President, Tau Kappa Epsilon Foundation**

**Marc Hilton, Campbell & Company**

**Andrew Brommel, Campbell & Company**

**Melissa Berliner, Campbell & Company**

Join Tau Kappa Epsilon Educational Foundation President, Gary Reed, and his trusted counsel from Campbell & Company as they share the key aspects of a case study on how to build and implement a planned giving program from the ground up. Learn about a unique plan that draws upon benchmarking, recent research and surveying and that has already produced real time results for the bottom line.

**VOLUNTEER TRACK – Discovering The Donor's Personal Story**

**Cosmopolitan C**

**Darrell Godfrey, Advancement Resources**

During the break-out session Mr. Godfrey will build from his Thursday presentation and discuss the importance of discovering the donor's "Personal Story" as it is related to his fraternity experience. Activities and discussions will show how to drive a deeper meaning for members, their philanthropy and the fraternity. A special focus will be on assisting volunteers in communicating and connecting with donors.

**It's a Parade, Not A Performance**

**Cosmopolitan D**

**Kim Spoonmore, Director of Client Services, Willow Marketing**

**Kristen Magnes, Director of Business Development, Willow Marketing**

Always evolving trends in new media and technology, and the demographics of your fraternal organization's membership have led to the need for some progressive changes in how you communicate with your donors and prospects. Though we don't always see the similarities between for profits and nonprofits when it comes to the goal of marketing it is the same, to create loyal relationships with key constituents that influence behavior. If you really want to create change for your organization you have to motivate a critical mass, your members. We'll discuss the role marketing plays not only in building awareness, but also the preference to support your mission. We'll provide you with tools to assess and build your brand! As executives, staff and volunteers, marketing is more than just an opportunity for your organization; it is a responsibility.

**Moving From "They" to "We"**

**Vision**

**Teri Chadwick, Executive Director, Pi Beta Phi Foundation**

**Rebecca Randolph, Executive Director, Pi Beta Phi Housing Corporation**

The national foundation-fraternity/sorority relationship is complicated. Add a national housing corporation and it gets even more complicated. Between competing organizational priorities and multiple personal agendas, the shared vision and mutual interest can sometimes suffer, as can the working relationship between staff and volunteers. A systematic approach to improving the strategic relationship between all entities will result in operational achievements, and vice versa. This program will review the successful model that has been implemented at Pi Beta Phi in the last two years. Since 2009, Pi Beta Phi Fraternity, Foundation and Fraternity Housing Corporation have implemented a series of operational and strategic steps to align mission and work plans and negotiate around critical issues. All three entities are working together, cohesively, for the common good of the sisterhood of Pi Beta Phi and several milestones have been achieved, including: - a Mutual Operating Agreement - Synergistic working relationships between key staff - Mutual support and trust among executive staff leaders - Increased communication and cross-entity support from volunteer leadership Our outcomes have substantially impacted our ability to fulfill our mission, and include a 66% increase in unrestricted collegiate chapter giving to the Foundation in a one-year period. Come and see what parts of the model may be applicable to your organization and can be used to advance your mission.

**FRIDAY, AUGUST 19, 2011**  
**EDUCATIONAL SESSION - BLOCK IV**  
**4:30-5:30PM**

**LEGAL TRACK - Who Says Legal Advice is Never Free?**  
**It is Today!!! (The Doctor is in - Juris Doctor, that is . . . )**

**Studio One**

**Dianne Bailey, Attorney, Robinson Bradshaw Hinson**  
**Kathy Williams, Executive Director, Phi Mu Foundation**

This will be a frank, fun, and perhaps even funny conversation about the myriad of legal issues that fraternity and sorority foundation Executive Directors face on a daily basis. What special challenges do foundations encounter? Who controls the grant process? What type of contracts/agreements are needed and when? What about those wild and crazy collegiate chapter fundraising activities? Any pitfalls in the world of social media? When do you need to contact the attorney? Kathy Williams, Executive Director of the Phi Mu Foundation, and Dianne Chipps Bailey, attorney with Robinson, Bradshaw & Hinson, P.A., will banter about these legal quandaries and more. Your questions are welcome too. The "Juris Doctor" is in!

**One Size Doesn't Fit All**

**Discovery**

**Nancy Craig, Executive Director, Sigma Sigma Sigma Foundation**

Approaching donors is like clothing: one style doesn't work for everyone. Age matters. So does gender. To move donors up the giving pyramid, fundraisers must understand these differences and tailor strategies accordingly. Although we can segment and approach donors in many ways, this session looks at age and gender specifically. A panel of six -- three men and three women representing three different age ranges -- helps attendees explore generational differences of men and women, using research findings as well as personal experiences. This is a participatory session where attendees share stories/printed materials -- both successes and failures. Attendees leave with ideas to improve solicitations and stewardship.

**Investment Committee Bootcamp**

**Cosmopolitan C**

**Keith Steiner, Vice President, UBS Institutional Consulting**  
**Aaron Girson, Executive Director, Sigma Alpha Mu Foundation**

Many Foundations have volunteer Investment Committees as part of their organizational structure. This program will seek to answer these questions and others: 1) How to incorporate our Foundation's Strategic Plan into your investment policy. 2) How to train volunteer members of investment committees on their fiduciary responsibilities. (Hint: It's not your money) 3) How to find the right investment manager for your organization. 4) How volunteers can be trained to answer donor/prospect questions about investment policy. 5) How Foundation Board leaders can decide which investment decisions should be delegated to Investment Committees, which to Investment Advisers and which to staff.

**Strengthening Connections**

**Cosmopolitan D**

**Michelle King, President, Shelle Design**

We all want to improve our storytelling and build stronger connections with our donors. But how do we do that? What are the trends in communicating to men versus women across multiple generations? Discover ways to improve your "marketing speak" and better connect with your donors.

**CHIA Preparedness**

**Vision**

**Don Bennett, Partner, Baker & Daniels, LLP**  
**Brad Hastings, President & CEO, Sigma Nu Foundation**

Is your foundation prepared for the passage to the Collegiate Housing & Infrastructure Act? Are you interested in learning how to establish accounts within your foundation which can be used to support educational improvements to your chapter facilities? This session will examine all of the steps your foundation would need to follow to establish accounts to properly assist your chapters in fund raising to improve your housing stock. This session will help your foundation position itself to take advantage of the passage of CHIA.

## **FRIDAY, AUGUST 19, 2011**

**6:30PM**

**THE Foundations Seminar Awards of Distinction Reception – Exhibitor Area**

Sponsored by: UBS Financial Services

**7:30PM**

**THE Foundations Seminar Awards of Distinction Dinner – Cosmopolitan Ballroom**

Sponsored by: Baker & Daniels, LLP

**NICF Awards of Distinction**

Sponsored by Goose Creek Publishing

## **SATURDAY, AUGUST 20, 2011**

**7:30 AM      Registration**

**7:30-8:15AM**

**Hearty Breakfast – Not to be missed!!**

**Regency AB**

Sponsored by: Aria Communications

Menu Items Include:

Eggs, bacon, sausage, potatoes,  
assorted cereals, granola, fruit, yogurt, milk, juices

**8:15-9:15am**

**General Session**

**Cosmopolitan AB**

Sponsored by: Pursuant / Ketchum

**Transforming the Nonprofit Sector**

**Jeff Mason, Vice President, Social Solutions**

We are in the midst of a serious social and economic crisis in the U.S. In response, we are pumping hundreds of billions of dollars into the nonprofit sector annually to improve the lives of those in need. Yet we can't seem to "move the needle" on many of our most pressing social issues. This presentation will explore some of the reasons behind nonprofit ineffectiveness, key trends that are helping to spark a change in the status quo, and what you can do to help.

**9:15-9:30AM**

**Vendor Visits & Morning Break**

**Cosmopolitan Foyer**

Sponsored by: Goelzer Investment Mgt.

**SATURDAY, AUGUST 20, 2011**  
**EDUCATIONAL SESSION BLOCK – V**  
**9:30-10:30AM**

**The Nuts & Bolts of a High Performing Nonprofit Sector**

**Studio One**

**Jeff Mason, Cygnus Social Solutions**

Dovetailing the Transforming the Nonprofit Sector keynote this session we will delve deeper into what nonprofit practitioners and philanthropists need to do to be more effective. You can expect to better understand performance management, how performance management differs from evaluation, and some key concepts related to implementing a performance oriented strategy.

**State of Our Industry**

**Cosmopolitan C**

**Patrick Alderdice, President & CEO, Pennington & Co**

**Jason Butler, Vice President, Pennington & Co.**

Pennington & Company has researched, compiled and evaluated IRS Form 990 filings for fiscal years 2003 to 2008 for Greek foundations. They will deliver the findings of their research and discuss the trends from both the administrative and donor perspectives, as well as analyze the opportunities and challenges that Greek foundations face in regard to operations and fundraising.

**INVESTMENT SESSION**

**Cosmopolitan D**

**Don Hutchinson, Goelzer Investment Management**

**Your Fundraising Data: Clean-Up, Conversion & Challenges**

**Discovery**

**Fred Maglione, Chief Advancement Officer, OmegaFi**

**Chris Fedor, Administrative Manager, Alpha Gamma Delta Foundation**

**Joel Wendland, Director of Member Services, Theta Chi Foundation**

Your database contains tens of thousands of membership and donor records. How complete is it? More important, are your data management practices consistent from one year to the next? Between the foundation and fraternity? Come learn how Alpha Gamma Delta and Theta Chi spent more than a year reviewing, updating and improving their data and data policies with OmegaFi. Learn from their experience, mistakes and walk away with simple steps you can take to begin the review and clean-up process within your own organization. Data impacts fundraising. Maximize your data to improve your overall development plan.

**Building Online Experiences for Donor Engagement**

**Vision**

**Derrick Feldman, CEO, Achieve**

**SATURDAY, AUGUST 20, 2011**  
**EDUCATIONAL SESSION BLOCK – VI**  
**10:40am-11:40am**

**Maximize the Middle:**

**Studio One**

**The Middle Donors of Today are the Major Givers of Tomorrow**

**Matt Frazier, Founder & CEO, Pursuant Ketchum**

Your donor file has a hidden gold mine that most institutions continue to overlook – mid-level donors. In the constant painful cycle of retaining and reactivating donors, organizations not only struggle to move them up the donor pyramid, but also can miss out on valuable and untapped opportunities that exist in their list. In this webinar, Matt Frazier will challenge the myths of moves management and introduce methods and strategies that have proven to maximize mid-level giving and identify the next generation of major donors. In this session, you'll learn the approaches and tactics to:

- Build a strong, sustainable pipeline for major donors
- Acquire mid-level donors and secure commitments to help you meet your annual goal
- Use donor intelligence to identify prospects and opportunity

## **Countdown to Compliance**

## **Cosmopolitan C**

**Moderator – Catherine Winge, Principal, Aria**

**Jen Pendleton, Executive Director, Kappa Alpha Theta Foundation**

**Ann Truesdell, Executive Director, Kappa Kappa Gamma Foundation**

**John Christopher, Partner, Dinsmore & Shohl**

So you've decided to take the next steps toward becoming compliant. . . what information do you need to collect? Should you do it inhouse or through a law firm? Should you register in all 50 states right away? And what size font should you use on the mail pieces and where should it be placed? These are just a few of the questions Greek foundations are discussing. This panel will cover these questions. . . and yours. . . in this session as we open up the ongoing compliance discussion with several foundations at various stages of the compliance process.

## **“They Don’t Get It / They Don’t Get It”**

## **Cosmopolitan D**

**David Westol, Owner, Limberlost Consulting**

Is the relationship between your foundation board and governing board good, tolerable or characterized by snotty comments, drama and criticism? Are members of the governing board frustrated with the failure of the foundation board to land those whales? Are members of the foundation trying to control the governing board via the proverbial purse strings? We'll look at seven sources of friction between foundation and governing boards and methods to reduce or eliminate those issues that often keeps both boards from working well together and advancing the cause.

## **Your Development Program:**

## **Discovery**

### **Invest for the Future or Risk Stagnation**

**Scott Meitzen, President, Fund Raising Counsel, Inc.**

Einstein said it best: “Insanity: doing the same thing over and over again and expecting different results.” Fraternity and Sorority Foundations face many competing demands from their multiple constituencies and boards: keep expenses low; increase total giving, increase support of the Fraternity/Sorority; build the endowment, find wealthy and generous supporters and build close relationships with them so they will be extremely generous. Our host institutions are raising millions of dollars from our alumni/ae, through campaigns, major gift efforts and planned giving programs and yet, for the most part, we still continue to generally get much smaller annual gifts from these very same donors. This workshop will challenge commonly-held assumptions about: appropriate cost per dollar raised levels; what is important to measure and track, and what isn't; partnering with the Fraternity/Sorority to make short term cuts in order to create significant long-term gains; building a staff and program plan which will reap significant benefits in the future; changing the nature and culture of budget discussions and staffing decisions with your board; and creating a long-term focus, rather than short-term within your organization. The workshop will share specific questions and tools for beginning this conversation in your organization as well as provide a framework for creating a culture of long-term thinking and planning within your organization.

## **Getting the Most Out of Your Database**

## **Vision**

**Moderator - Rob Taflinger, TKE Foundation**

**Joe Klimek, CSI/iMIS**

**Fred Maglione, OmegaFI**

**Scott Martin, Patriot**

**Chad Boslog, Blackbaud**

All organizations struggle with their databases. Staff members can experience difficulty developing queries and reports to make sense of their data in order to take action that will help meet their organizational goals. This session will provide participants an open and collaborative environment to discuss their goals and strategies to utilize the data found within their databases. A database is only as good as the organized effort to collect, store, and update the data found within. Come learn from a panel of database developers, as they answer questions gathered from Fraternity and Sorority Foundation users. Participants will share example frustrations with their own databases and help find solutions to help their colleagues.

**SATURDAY, AUGUST 20, 2011**  
**EDUCATIONAL SESSION BLOCK – VII**  
**11:50-12:50PM**

**Integrated Communication and Technology**

**Studio One**

**Lola Mauer, Lead Consultant, Pursuant Ketchum**

Integrated strategy is the foundation for successful giving. Through thoughtful planning, data integrity and an awareness of your constituencies' preferences you are able to adequately form a plan for fundraising success. But what about current students and recent alumni? How do these ever changing groups, the future of giving to your organization, prefer to be communicated with; what has their attention; and how can you maximize your efforts to steward and solicit them properly? Gen X and Millennials are forcing us to think differently. Is your organization ready for them? This session uses trends, data and proven strategies to take a close look into the next generation of annual donors, major donors and board members of the Greek world.

**Making the Ask**

**Cosmopolitan C**

**Steve Hartman, Executive Director, Phi Kappa Tau Fraternity & Foundation**

**David Westol, Owner, Limberlost Consulting**

This program will help clarify the important role that volunteers can fulfill in cultivating major gifts. It also outlines the steps that are needed to approach a prospective donor and provides a template for the level of engagement that a volunteer can have with staff and prospective donors. Participants will be offered a scenario and will be able to work through the roles that can be established when asking for a major gift.

**Understanding the Millennial Donor &  
Engaging the Next Generation**

**Cosmopolitan D**

**Derrick Feldman, CEO, Achieve**

**Trending Now: What We Can Apply from the  
Most Successful University Major & Planned Gift Programs**

**Discovery**

**Dianne Johnson, President, Endowment Builders**

**Michael Rubin, Principal, Michael D. Rubin & Associates**

This session will focus on strategies Panhellenic foundations can apply from today's university key advancement trends. The speakers will bring ideas on engaging high level volunteers and Boards, our most potent sales force in the major and planned giving process, which also serves to get people more involved in their own giving. Highlighting sustained major and planned gift approaches to fundraising, attendees will look at how training needs and management is changing to assure a productive working relationship. The speakers will zero in on the institutional advancement trend that more and more gifts are planned gifts, especially in this economy. More donors must figure out how to transfer big assets that aren't liquid and Panhellenic Foundations need to be ready to ask and guide donors through a transfer. Finally, the session will explore the donor focused trend of demonstrating IMPACT of a donor's gift – during the solicitation process and stewardship. Donors are demanding more accountability and bang for their buck. And good stewardship paves the way to even more engagement and future gifts. The attendees, through example and in discussion, will develop specific steps in response to these new university trends that they can use in their development programs this year.

**iMIS Users Group**

**Vision**

**Doug Morris, President, Computer Systems Innovations, Inc.**

**Joe Klimek, Computer Systems Innovations, Inc.**

This session will explore new and improved ways to use iMIS Fundraising. Come learn about best practices for system setup, reporting techniques, correcting gifts/pledges, and accepting online donations. An open forum will take place at the end of the session where you can share some of your tips and tricks with other iMIS Fundraising users as well as provide feedback to the developers of iMIS. If you are an iMIS user, don't miss this exciting session!