

Alumni Relations and Institutional Giving

Finnish Higher Education Experts USA Study Tour 2012

March 25-30, 2012

Washington, DC, Maryland, and Virginia

AGENDA

Purpose:

This delegation from Finnish higher education institutions searches for best-practices in alumni cooperation, fundraising and donor relations. Specifically, participants will visit institutions in the state of Virginia and in Maryland to discuss alumni affairs and alumni cooperation, fundraising and donor relations. The group will learn about the American system from expert speakers and through direct observation at private and public universities. The seminar will focus on comparing U.S. as well as current and emerging Finnish strategies in the area and identifying possible applications of the American practice to the Finnish system. There are 14 members in the delegation.

Agenda:

Participants will travel to Washington, DC, Maryland and Virginia for a five-day higher education leadership seminar. The program will consist of a day-long introductory workshop in Washington, DC, and four site visits to public and private universities (one in Maryland and three in Virginia), and two debriefing meetings.

PROGRAM AGENDA:

SUNDAY, MARCH 25

Evening: Pre-seminar briefing and casual group dinner.

5:00-6:00pm

Introductory Meeting

- *Terhi Mölsä, Executive Director, Fulbright Center Finland*
- *Suzanne Louis, Project Consultant, Fulbright Center, Retired 2006 from the International Studies Office, University of Virginia*
- *Svet Trocheva, Program Manager, Institute of International Education*

6:30pm

Informal Opening Dinner Old Ebbitt Grill Restaurant

DAY 1: MONDAY, MARCH 26

Full-day opening workshop at the Institute of International Education

8:00-9:00am

Breakfast, Welcome and Introductions

- *Terhi Mölsä, Executive Director, Fulbright Center Finland*
- *Svet Trocheva, Program Manager, Institute of International Education*

9:00-10:30am

Alumni Relations, Communications, Development & Marketing: Best Practices

- *Amir Pasic, Vice President of International Operations, Council for Advancement & Support of Education (CASE)*
 - Brief introduction to CASE
 - How do universities find stakeholders that provide funding?
 - How do they do fundraising?
 - Importance of community
 - Raising friends before raising funds
 - Structure and function of the Development and Alumni Offices
 - Best practices for working with alumni
 - Best practices for soliciting grants & obtaining funding from outside sources

10:30-10:45am

Coffee Break

10:45am-12:00pm

The Evolution of Development and Alumni Fundraising Initiatives in the U.S.

- *Andrew Shaindlin, Associate Vice President for Alumni Relations & Annual Giving, Carnegie Mellon University*
 - How alumni affairs & institutional giving have developed in the U.S. in the past 20 years
 - Case studies of institutions that made big strides in the field
 - Best practices in institutional giving and alumni initiatives
 - Next steps for institutional giving

12:00-1:15pm

Working Lunch with Allan Goodman, President & CEO, Institute of International Education (IIE) and Karin Fischer, Senior Reporter, Chronicle of Higher Education

1:15-2:30pm

Identifying University Supporters: Alumni, Students, Parents and Friends

- *Margaret Frondorf, Director of Alumni Relations, The Paul H. Nitze School of Advanced International Studies (SAIS), The Johns Hopkins University*

- Prioritizing your constituent base
- Developing communities
- Identifying leaders
- Supporting local initiative
- Broadcasting opportunities
- Getting students connected

2:30-2:45pm

Coffee Break

AFTERNOON WORKSHOP: COST EFFECTIVE STRATEGIES FOR REACHING OUT TO ALUMNI

2:45-4:00pm

Using Technology to Reach Out to Alumni

- *Andrew Shaindlin, Associate Vice President for Alumni Relations & Annual Giving, Carnegie Mellon University*

4:00-5:15pm

Alumni Relations on a Shoe String

- *Mark Thaden, Director of Alumni Relations, University of Mary Washington*
 - Implementing an outreach strategy
 - Best practices for using social media
 - When to spend money on cultivating alumni development

6:30-8:00pm

Opening Buffet Dinner

Hosted by Ambassador of Finland Ritva Koukku-Ronde
Embassy of Finland

8:00-9:00pm

Friends of Fulbright Finland Reception

Honoring the 60th Anniversary of the Signing of the Fulbright Agreement between Finland and the United States

Hosted by Ambassador of Finland Ritva Koukku-Ronde
Embassy of Finland

DAY 2: TUESDAY, MARCH 27

Morning site visit to University of Maryland, afternoon travel to Richmond.

- 8:30am **Casual Breakfast with University of Maryland Staff**
- 9:00-10:00am **Welcome/Building A Culture of Philanthropy at Maryland**
- *Brodie Remington, Vice President for University Relations*
- Fear the Turtle: Messaging and Positioning through Marketing and Communications**
- *Brian Ullman, Assistant Vice President for Marketing and Communications*
- 10:00-10:45am **A Brief History of Maryland/The Great Expectations Campaign for Maryland**
- *Leslie Coleman, Senior Director of Leadership Gifts*
 - *Patricia Wang, Director of Gift Planning and Estate Administration*
 - The Land Grant institution legacy
 - The rise of the University of Maryland
 - Proximity and connections
 - Maryland Day and other presidential initiatives
 - The giving pyramid and donor cycle
 - Donor motivation and passion
 - Transactional versus transformational gifts & - Donor-Centered Fundraising
 - The great expectations campaign for Maryland
 - The university's strategic plan and objectives
 - Identifying campaign priorities, campaign plan and timeline
- 10:45am-12:00pm **PANEL – Development: Thinking Strategically About Prospects**
- *Carla Andrews O'Hara, Associate Director of Corporate and Foundation Relations*
 - *Gina Callahan, Associate Director of Leadership Gifts*
 - *Leslie Coleman, Senior Director of Leadership Gifts*
 - *Kathleen Diemer, Director of Donor Relations*
 - *Pernell Watson, Director of Research*
 - Leadership gifts and donor relations
 - Useful research resources and tools to identify prospects
 - Building and managing the pipeline
 - Positioning the President
 - Garnering partnerships with corporations and foundations
- 12:00-1:00pm **The Alumni Association and Alumni Programs: Trends and Best Practices**
- *Beth Morgan, Chief Administrative Officer, Alumni Association*
 - *Mario Peraza, Director of Alumni Volunteer Programs*
 - Becoming a terp for life
 - Alumni programs overview
 - Alumni participation and engagement: join and give
- 1:00-2:00pm **Lunch with Colleagues at the University of Maryland**
- 2:00pm **Informal Driving Tour of University of Maryland Campus in Group Bus**
- 2:00- 5:00pm **Travel to Richmond**

Free evening

Optional program: Historic walk and dinner by the James River.

DAY 3: WEDNESDAY, MARCH 28

Morning site visit to University of Richmond, afternoon midway debriefing at the University of Richmond.

9:00-9:15am

Welcome

- *Uliana Gabara, Dean, International Education*

9:15-9:30am

Overview: Alumni Relations and Institutional Giving at UR

- *Thomas C. Gutenberg, Vice President for Advancement*

9:30-10:00am

Data Management

- *Kerri Chapman, Director, Advancement Systems*

10:00-10:30am

Alumni Relations: Engaging Alumni

- *Kristin Woods, Assistant Vice President for Alumni & Career Services*
- *Laura Krajewski, Director, Alumni Events*
- *Kathryn Bell, Assistant Director, Regional Initiatives*
- *Erin Richardson, Assistant Director, Regional Initiatives*

10:30-11:15am

Giving & Capital Campaigns

- *Julie Solomon, Assistant Vice President for Development*
- *Heather Krajewski, Director of Development*
- *Scott Peters, Director of Annual Giving*
- *Aaron McClung, Director of Gift Planning*
- *Shawn Morrison, Director of Prospect Research*

11:15am-12:00pm

Donor Relations and Stewardship

- *Laurel Hayward, Director of Donor Relations & Stewardship*
- *Beth King, Director of Events Management*

Lunch

Meet the University of Richmond's Global Team

AFTERNOON SEMINAR AND MIDWAY DEBRIEFING

University of Richmond

2:00-3:30pm

Best Practices for Managing Alumni Associations: A Case Study of the University of Virginia

- *Wayne Cozart, Vice President of Development, Director of the Jefferson Trust for the UVA Alumni Association*

3:30-4:00pm

International alumni--Think about the future!

- *Suzanne Louis, Project Consultant, Fulbright Center, Retired 2006 from the International Studies Office, University of Virginia*
 - practical suggestions based on experiences from the University of Virginia
 - international alumni cooperation and the Friends of Fulbright Finland Network

- 4:00-5:00pm **Midway Debriefing and Group Discussion**
Facilitator:
- *Terhi Mölsä, Executive Director, Fulbright Center Finland*
- 5:00pm **Informal Driving Tour of University of Richmond Campus in Group Bus**
- Free evening

DAY 4: THURSDAY, MARCH 29:

Morning site visit to Virginia Commonwealth University in Richmond, afternoon travel to Williamsburg and meeting with W&M students.

- 9:00am **Welcome**
- *John Blohm, Vice President for Development and Alumni Relations*
- 9:15-9:45am **Development and Alumni Affairs at VCU: Paradigm Shift**
- *Samantha Marrs, Sr Associate Vice President for Development*
 - *Gordon McDougall, Associate Vice President for Alumni Relations*
- 10:00-11:00am **PANEL: Engaging Non-Alumni Stakeholders**
- *Ken Blaisdell, Senior Philanthropic Advisor*
 - *Scott Rash, Vice President, School of Engineering Foundation*
 - *Tom Burke, Executive Director, VCU Foundation*
 - *Bill Kotti, President, MCV Foundation*
- 11:00am-12:00pm **PANEL: Building the Operations to Support Institutional Fundraising**
- *Lauren Shiver, Assistant Vice President for Advancement Services*
 - *Blake MacIver, Director of Research and Campaign Analysis*
- 12:00-1:00pm **Box Lunches at VCU Scott House**
Casual lunch with VCU development team
- 1:00pm **Informal Tour of VCU Campus lead by a VCU student tour guide**
- 1:15-2:30pm **Travel to Williamsburg, VA**
- 4:00–5:00pm **Future Alumni: the Student View**
Informal coffee with students from William & Mary serving on Student Alumni Council (SAC) and Development Ambassadors (DA).
 -Student role in Alumni Development (student volunteers, leadership, etc.)
 -How does William & Mary Alumni Association reach out to students?
- 5:00–5.30pm **Campus tour, led by a student tour guide from the admission office**
- Free evening Optional program: walk through colonial Williamsburg led by Ilja Orre, Fulbright Center undergraduate grantee senior at William & Mary, and Suzanne Louis,

W&M Class of 1971 and dinner at one of the colonial restaurants.

DAY 5: FRIDAY, MARCH 30

Morning site visit to College of William & Mary.

Final debriefing in William & Mary Alumni House and closing lunch at the Williamsburg Hospitality House.

- 8:15am **Breakfast at College of William & Mary**
*Hosted by **Stephen Hanson**, Vice Provost for International Affairs*
*Welcome by **Taylor Reveley**, President*
Location: William & Mary Alumni House
- 9:00-10:00am **PANEL: Creating Lifelong Relationships: Life Cycle for Engagement**
- ***Sean Pieri**, Vice President for University Development*
 - ***Henry Broaddus**, Associate Provost for Enrollment/Dean of Admission*
 - ***Virginia Ambler**, Vice-President for Student Affairs*
 - ***Karen Cottrell**, Executive Vice President for Alumni Association*
 - ***Earl Granger, III**, Associate Vice President for Development*
- 10:00-11:00am **PANEL: Giving Along the Continuum**
- ***Dan Frezza**, Senior Associate Director, Annual Giving Programs*
 - ***Lee Walsh**, Director of Gift Planning*
- 11:00- 12:00pm **Use of Technology to Engage Stakeholders**
- ***James Golden**, Vice President for Strategic Initiatives*
- 12:00-1:00pm **Final Debrief and Group Discussion**
Facilitator:
- ***Terhi Mölsä**, Executive Director, Fulbright Center Finland*
- 1:15-2:30pm **Closing Lunch in Williamsburg**
Williamsburg Hospitality House
- 2:30pm Transport to Richmond Airport (arrive Richmond around 3:30pm)

END OF STUDY TOUR

FULBRIGHT CENTER

The Fulbright Center (the Finland-US Educational Exchange Commission FUSEEC) is a private service organization that specializes in academic and cultural exchange between Finland and North America. The Center awards annually over USD 1 million in scholarships to Finnish and American students, researchers, and professionals, and provides training and information services around Finland with approximately 4000 client contacts per year. The Fulbright Center is funded by the Finnish, US and Canadian governments, the Finland-America Educational Trust Fund founded by the US and Finnish governments, and universities and private foundations in Finland. Close to 80 % of the Center's funding comes from Finland.

INSTITUTE OF INTERNATIONAL EDUCATION (IIE)

Founded in 1919, the Institute of International Education (IIE) is a private nonprofit leader in the international exchange of people and ideas. In collaboration with governments, foundations and other sponsors, IIE creates programs of study and training for students, educators and professionals from all sectors. These programs include the flagship Fulbright Program and Gilman Scholarships administered for the U.S. Department of State. IIE also conducts policy research, provides resources on international exchange opportunities and offers support to scholars in danger.