



DEVELOPMENT
September 20, 2019
Radisson Blu Aqua **DAY**
CHICAGO

DATA DOWNLOAD

(SPONSORED BY GIVSMART BY COMMUNITY BRANDS)

Savvy fundraisers understand that achieving their goals means utilizing all of the resources at their disposal. On September 20, take a deep dive into data-driven strategies, best practices, and expert advice to enhance annual giving, improve donor segmentation, and build a strong community through year-long donor engagement. Add new tools to your fundraising toolbox by attending one or all of the sessions offered in the DATA DOWNLOAD track.

- Data Driven Donor Engagement: Growing Your Annual Fund with Philanthropic Communications
- Mastering the Art of Ask Amounts: Learn the Secret Formula for Segmenting Your List, Nailing Ask Amounts and Growing Your Annual Fund Year Over Year
- Building Community: How to Engage Donors All Year Long



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DATA DRIVEN DONOR ENGAGEMENT: GROWING YOUR ANNUAL FUND WITH PHILANTHROPIC COMMUNICATIONS

A successful annual giving program is the foundation for any nonprofit's ability to fund immediate needs and often serves as part of a major gift pipeline strategy. You know it is vital to your keep current donors engaged, but how do you increase their giving and continue to grow your annual fund donor base? One of the most valuable prospecting tools available is your philanthropic communications strategy? Wait – with all of your free time you don't have one developed yet? Let us help! This session features a panel of three fundraising experts that together lead The Rotary Foundation's Leadership & Annual Giving department. They will share how their teams - which include philanthropic communications, annual giving officers, and fundraising analytics - work simultaneously to support each other's shared purpose of meeting increasing annual fundraising goals.

LEARNING OUTCOMES:

By the end of this interactive panel session, participants will:

- Understand how to identify giving identify trends in your donor base
- Learn how to segment your existing donor data to develop communications that result in more donations
- Apply current philanthropic communication trends to their existing donor base giving history to develop an enhanced donor engagement strategy
- Identify new prospective donor segments
- Leave with a customizable template to assist in creating a philanthropic communications strategy

SPEAKERS:

Stephanie Adomaitis, CFRE, Donor Engagment Manager, The Rotary Foundation
Chris Boyce, CFRE, Annual Giving Manager, The Rotary Foundation
Chad Stutsman, Manager of Fundraising Analytics, The Rotary Foundation



Stephanie Adomaitis, CFRE - Donor Engagement Manager, The Rotary Foundation

With over 10 years of philanthropic communications experience, Stephanie currently serves as the Donor Engagement Manager for The Rotary Foundation. Her team focuses on using donor data to create and implement an international, comprehensive philanthropic communications strategy to continue increasing annual fund donations. Prior to her role at The Rotary Foundation, she served as the Vice President of Development for Marcfirst.



Chris Boyce, CFRE, Annual Giving Manager, The Rotary Foundation

Chris manages a team of Annual Giving Officers who support fundraising and promote The Rotary Foundation's impact across North America through relationship building. Prior to his current role, he served previously as an Annual Giving Officer for Canada and the Northeast US. Before joining Rotary in 2013, Chris was the Development Manager for the Institute for Latino Progress.



Chad Stutsman, Manager of Fundraising Analytics, The Rotary Foundation

Chad leads a team responsible for the development of data driven analysis that enables The Rotary Foundation's annual giving, planned giving, and major giving development teams to make informed business decisions, manage donors, and identify prospects. The Fundraising Analytics team provides key metrics, identifies donor giving patterns, and supports prospective donor research using a blend of data gathering techniques from multiple platforms.



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MASTERING THE ART OF ASK AMOUNTS: LEARN THE SECRET FORMULA FOR SEGMENTING YOUR LIST, NAILING ASK AMOUNTS AND GROWING YOUR ANNUAL FUND YEAR OVER YEAR

Many fundraisers struggle at the end of the year - doing their best to get an annual appeal out the door! But too often we are trading expediency for effectiveness. While fundraising can be both an art and a science, implementing a strategic process and approach for your annual fund can reap substantial financial rewards. This session will teach the overall strategy and tactics to increase the effectiveness of your annual fund approach, follow-up with actual results from two different organizations who have used this system.

LEARNING OUTCOMES:

By the end of this session, participants will:

- Understand how to segment their donor base according to historical giving patterns
- Use data to identify the five different types of donors, and how to motivate each to renew or increase their gift to the Annual Fund.
- Learn how two organization implemented this system and what results they had
- Understand the time and resources needed to implement an effective annual fund strategy.

SPEAKERS:

Beth Lye, Senior Manager of Donor Relations, Cara Chicago
Lindsey Travers, Walk Manager, Alzheimer's Association
Carolyn Nopar, CEO, Chicago Fundraising Accelerator



Beth Lye, Senior Manager of Donor Relations, Cara Chicago

Beth Lye loves to help people experience the joy of giving. She has been working in development for over 15 years, all in human service organizations. Beth currently serves at La Rabida Children's Hospital, but previously served at Cara where she increased individual giving revenue to over \$1.1 million annually. She also started a planned giving program and raised a leadership gift that created the organization's first endowed fund. Before joining Cara, Beth managed the volunteer program at WINGS, which won "Volunteer Program of the Year" by Hands On Suburban Chicago. Beth received her MEd at DePaul University. Originally from Colorado, she now lives in Logan Square with her husband and daughter. When not working to save the world, she enjoys cooking and running on the Bloomingdale Trail.



Lindsey Travers, Walk Manager, Alzheimer’s Association

Lindsey Travers, is currently the Walk Manager at Alzheimer’s Association. Previously, she worked for WorldChicago where she was the Marketing and Development Manager heading up their communication and development efforts. Ms. Travers’ background includes global events management and marketing in Estonia and D.C. She has a BA from Illinois and a certificate of Nonprofit Management from UIC.



Carolyn Nopar,CFRE, CEO, Chicago Fundraising Accelerator

Carolyn Nopar, CEO, Chicago Fundraising Accelerator, which she founded in 2018. Previously Ms. Nopar served as head of development for YWCA Metropolitan Chicago and Family Focus. She also served as Executive Director for the Enterprising Kitchen. She has an MBA from Northwestern and is a CFRE.



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BUILDING COMMUNITY: HOW TO ENGAGE DONORS ALL YEAR LONG

As constituents, we give time and money to organizations that mean something to us. When you have a group of people who share the desire to achieve a common mission you must take advantage of the opportunity to create a community, not just a place to collect funds. GiveSmart's Dianne Kleber will lead the discussion on ways to build and sustain constituent involvement throughout the year, not just the day of the gala.

LEARNING OUTCOMES:

This session will include:

- Actionable ideas to implement
- Free and fresh ways to connect with donors
- Ways to think beyond the wallet
- Brainstorming – how
- Workshop minutes with other attendees

SPEAKERS:

Lisa C. Ewers, Director of Development, Giant Steps, Inc.

Dianne Kleber, Sales Director, GiveSmart by Community Brands



Lisa C. Ewers, Director of Development, Giant Steps, Inc.

Lisa is employed at Giant Steps, a non-profit organization providing therapeutic programs and services to individuals diagnosed with Autism Spectrum Disorders and currently serves as the Director of Development. Lisa has over 30 years of non-profit experience in various capacities, the last 15 years specifically in Development.

In addition to working for Giant Steps, Lisa is a member of the Lisle, Wheaton, Bolingbrook, and Sugar Grove Chambers of Commerce, WSPN, and LPGA Women Who Play.

Lisa first became involved in working with individuals with developmental disabilities as a volunteer, volunteer coordinator, for a Madison WI based non-profit. Over the last 30 years, she has served and exceeded in many roles such as: volunteer coordination, training, human resources, setting up homes in the community for people with developmental disabilities, and middle to upper management positions. She has had the honor and blessing of working with thousands of individuals and families with developmental disabilities, as well as, volunteers, staff, board members, and communities. Over the last 15 years in Development, specifically, she has helped raise over \$15 million and has experienced just about every aspect involved in Development.

Lisa has been married to Michael for six years and they met on E-Harmony!. Lisa and her family live in DuPage County and are active in their community. *continued...*

They have two children, Mike and Claire, who are both college graduates and almost off the payroll. They also have three rescue dogs: Buddy, Beau, and Bart. And because Lisa is originally from WI.....she is a Packer Fan! GO PACKERS!!

Lisa is a 1990 graduate of University of Wisconsin ~ Madison, Madison WI, with a B.S. degree in Rehabilitation Counseling Psychology.



Dianne Kleber, Sales Director, GiveSmart by Community Brands

Dianne is Sales Director at GiveSmart by Community Brands, a fundraising technology and event management company. Dianne has always enjoyed being involved with fundraising events. In fact, she found GiveSmart by Community Brands while she was the co-chair of a large gala for a Chicago independent high school and joined the team. As a volunteer, Dianne sits on the board of Abide In

Me, a nonprofit organization supporting adults with disabilities, she is an outreach volunteer for JDRF, and has served on the AFP Chicago Awards Luncheon Committee.

Dianne resides in the suburbs of Chicago with her two dogs, Sully and Toby, and loves drinking coffee with a good book, cooking, and spending time with her three children.