

JSN Advancement Officers Cohort Gathering
Sunday, July 15th – Tuesday, July 17th, 2018
Loyola University, Chicago, IL

CONFERENCE AGENDA

Sunday, July 15th

4:30 pm **Vice Presidents & Directors – Name Tag Pick Up**

Corboy Law Center: Kasbeer Hall

5:00 pm **Vice Presidents & Directors – Social**

Corboy Law Center: Kasbeer Hall

New Advancement Professionals – Orientation

Corboy Law Center: CLC 207

Is this your first JSN Conference? Are you wondering who can help you be better at your job? Veterans Ryan Bergin, Director of Development & Communications, St. Ignatius College Prep - Chicago and Colleen Carter, Vice President for External Relations, Boston College High, will help you get the most out of the next few days.

6:00 pm **Vice Presidents & Directors – Dinner**

Corboy Law Center: Kasbeer Hall

7:00 pm **Vice Presidents & Directors – Issues of the day**

Corboy Law Center: Kasbeer Hall

The conference starts with a facilitated conversation about the issues that are facing our departments. You will be able to briefly describe an issue or concern and others will be able to give you feedback. The goal is to connect with the broad experience and expertise available at this conference.

Monday, July 16th

7:00 - 9:00 am **Breakfast**

Breakfast: Lewis Towers: Regents Hall

8:15 am **General Conference Name Tag Pick up**

Corboy Law Center: Kasbeer Hall

9:00 am **Opening Prayer**
Conference Kickoff
Corboy Law Center: Kasbeer Hall

9:15 am **Advancement Professionals Survey Presentation**
Corboy Law Center: Kasbeer Hall

10:30 am **Break**

10:45 am **Session 1**

A: Data and Address Accuracy Best Practices

Corboy Law Center: CLC 206

Accurate contact data is the most valuable resource for a Development Office. Jeff McCormick, Director of Development & Planned Giving, St. Ignatius High School, Cleveland, examines best practices for communicating with your constituents.

B: Building a Successful Annual Fund

Corboy Law Center: CLC 208

Looking to build your Annual Fund from the ground up, or just strengthen your Annual Giving Foundation? Nick Suszynski, Director of Development, Jesuit High School – Tampa, shares five concrete strategies to see quick and tangible results.

C: The Pros and Cons of a Comprehensive Campaign

Corboy Law Center: Kasbeer Hall

Due to our humble nature, Catholic institutions have historically downplayed campaign success. In this session, John Morabeto, Vice President Institutional Advancement, St. Ignatius High School, Cleveland and Tony Schad, Vice President Advancement, St. Xavier High School, Cincinnati, will explore the benefits (and pitfalls) of celebrating all types of giving within a campaign for the long-term sustainability of our organization, much like hospitals and universities.

D: Challenging Communications

Corboy Law Center: CLC 207

Boston College High School has faced some of the most challenging public relations issues in recent years. Colleen Carter, Vice President for External Relations, share the lessons they have learned and the systems they have instituted as a result. Topics covered include working with a public relations firm, communicating with groups beyond the school's typical constituencies and addressing difficult subjects such as sexual abuse and school identity.

12:00 noon **Lunch** *Lewis Towers: Regents Hall*

1:30 - 2:15 pm

Session 2

A: Alumni Reunion Giving

Corboy Law Center: CLC 206

Alumni connections to your school often peak during reunion years. Learn specific strategies for capitalizing on these occasions through a *Reunion Giving* program. Molly Smith, Annual Fund Director, Jesuit High School – Tampa, will share a targeted plan to increase your alumni giving revenue.

B: Advanced Segmentation: Using Data to Drive Your Appeals

Corboy Law Center: CLC 207

Bonnie Wojno, Vice President Advancement, Walsh Jesuit High School, and Marion Drake, Director of the Warrior Fund explain how their department improved their fundraising capabilities through a focused and refined segmentation process that increased donations to their Annual Fund by more than 60% since the 2015-16 FY.

C: Capital Campaign Best Practices – Traditional and Cristo Rey

Corboy Law Center: Kasbeer Hall

This presentation combines lessons from two different schools:

Dean Hanks, Vice President of Development, Bellarmine Preparatory School, will share some insights into their recently concluded \$8.5 million capital campaign for a new Campus Center. This was the largest campaign in Bellarmine history and was initiated with a new President without any fundraising experience. The Campaign concluded in two years with a total cost for fundraising of less than 5%. It also included the first \$1 million plus campaign gift in Bellarmine's history.

Elizabeth Wambui, Director of Advancement, Nativity School of Worcester, describes successes, challenges and lessons learned from the unique perspective of the Nativity Model. Nativity Worcester embarked on the school's first ever capital campaign with the goal of raising \$10.5 million for the following objectives: 1) retire the debt; 2) make needed upgrades to the building; 3) create a more substantial endowment fund; and 4) secure operating funding over the projected course of the campaign.

D: Creating a Communication Plan

Corboy Law Center: CLC 208

Creating a consistent voice across your brand and in publications as well as collaborating between the Admissions and Development office can be difficult. Karen Snyder, Marketing and Communications Manager,

Gonzaga Preparatory School, will share some challenges and successes they have found in these areas. Karen will share advice for creating and utilizing an annual Communications Forecast Plan and the process of completing a Marketing Strategic Plan, which they are currently in the midst of.

2:30 pm

Break

3:00 pm

A: Successfully Managing an Alumni Association

Corboy Law Center: CLC 208

Phil Fernandez, Executive Director of Advancement and Alumni Relations, Belen Jesuit, shares how their experience from Cuba to exile in Miami shaped a unique Alumni Association and how an emerging Advancement Office works around an unconventional structure. Phil will cover their mentorship programs, shifting from a dues based model to annual support, and the challenges of communicating with an organization that is separate from the school itself.

B: Maximize Your Major Gifts Program

Corboy Law Center: CLC 207

Bob Miller, Vice President Advancement, Loyola Academy – Wilmette, will share with you how he manages the school's Major Gifts program. This presentation will cover the development and use of contact reports, moves management, prospect research, portfolio management, and Loyola Academy's fundraising incentive program.

C: Creating and Articulating a Bold Vision

Corboy Law Center: Kasbeer Hall

Melissa Jones, Vice President Institutional Advancement, St. Louis University High School, will review the process their school utilized to craft its strategic plan, *Imagining 18*, and how this plan will drive the *Go Forth*, SLUH's \$70 million capital campaign poised to go public in the fall. Melissa will discuss how the school articulates this bold vision to (and through) its constituents. Consider the lessons learned at SLUH to inspire a new vision and messaging for your school.

4:15 pm

Depart for St. Ignatius College Prep

5:00 pm

Mass

5:45 pm

Tours

6:15 pm

Social

7:00 pm

Dinner

Tuesday, July 17th

6:30 - 8:30 am

Breakfast *Lewis Towers: Regents Hall*

9:00 am

Morning Prayer

Conference Address

Fr. Bill Muller, S.J., Executive Director, Jesuit Schools Network
Corboy Law Center: Kasbeer Hall

9:30 am

A: Vice Presidents: Working With Your Board of Trustees.

Corboy Law Center: CLC 207

The Board of Trustees is potentially the most valuable constituent group of our schools. They have the potential to support your school's mission as givers, getters, and guiders. Peter Hoskow, Principal and Managing Director of CCS Fundraising facilitates a conversation about communicating with and cultivating this important group of people.

B: Specialty Networking – Materials Exchange

Corboy Law Center: Kasbeer Hall

A historical favorite and a great opportunity to be inspired by the communications produced throughout the Jesuits Schools Network. You should be able to collect enough ideas to help you until our next conference.

10:15 am

Break

10:30 am

Session 1

A: Presidential Transitions

Corboy Law Center: Kasbeer Hall

Presidential transitions are a significant event for any school. Over the past decade many schools have transitioned or are transitioning from a Jesuit priest to lay president. This transition has had a varying impact on our schools. This panel discussion with Fr. Michael Marco, S.J., Marquette University High School; Grace Regan, President, Boston College High; and David Laughlin, President SLUH/Rockhurst High, will answer questions gathered from across the Jesuit Schools Network.

B: LinkedIn Best Practices

Corboy Law Center: CLC 208

LinkedIn has developed a reputation as the social media outlet for professionals. Nicci Bosco, Senior Customer Success Manager, LinkedIn,

will offer best practices to make sure your school is utilizing this resource to its fullest.

C: Creating an Advancement Career

Corboy Law Center: CLC 206

Ed Franchi, Major and Planned Gifts Officer, St. Xavier – Cincinnati, and Bethany Carmellini, Director of Annual Giving and Scholarships, Regis Jesuit, lead a discussion about pursuing a career in advancement. What opportunities are available? What continuing education or certifications should you consider?

D: Donor Research: Tools and Templates for All School Sizes

Corboy Law Center: CLC 207

How to use donor research for a successful campaign or to sustain and strengthen a dynamic, ongoing annual giving program. Whether you are a large or small school, wealth screening of your donor database will validate your current list of major gift prospects and provide you with a new list of future prospects. Ralph Nardini, Major and Planned Gifts Officer, St. Xavier High School, Cincinnati and The Nardini Group will show you how to easily integrate donor research into your database and, in turn, improve your fundraising and donor cultivation programs.

12:00 noon

Lunch *Lewis Towers: Regents Hall*

1:30 pm

Session 2

A: Building Alumni Participation

Corboy Law Center: Kasbeer Hall

A roundtable conversation between the best performing programs in the Jesuit Schools Network. How do they do it?

B: Moves Management: Three Case Studies

Corboy Law Center: CLC 207

How do you help move a current parent from “brand new” to “donor” or even “major donor” when you have so little time to get them there before graduation? How do you manage prospects and donors and keep your fundraising programs alive and thriving during times of transition? And what are the moves management methods and tools that can be used by a small shop to maximize their fundraising efforts? In this session, Mary Gene Clavin, Transition Consultant, Boston College High School and founder of Advancement Incite, and Kim Jennings, Director of Parent Giving & Engagement, Boston College High School, will examine moves management strategies applicable for all types of programs.

C: Building Your School’s Endowment

Corboy Law Center: CLC 208

It used to be conventional wisdom that high schools could not raise money for an endowment. Now financial aid endowments are among the most appealing appeals a school can make. Joe Vollert, Vice President Advancement, St. Ignatius College Prep - San Francisco, and Katrina Freeburg, Director of Individual Giving, Seattle Preparatory School share their efforts to build schools' endowments.

D: Special Event Promotions

Corboy Law Center: CLC 206

Special events are a key part of advancing our schools' missions. Promoting these events are a significant key to their success. Elizabeth Wambui, Director of Advancement, Nativity School of Worcester and Moira Healy, Director of Parent Engagement and Major Events, Rockhurst High School share the lessons they have learned promoting events to a distracted audience.

2:30 pm

Break

3:00 pm

Session 3

A: Successful Alumni Events

Corboy Law Center: CLC 207

All schools are on the lookout for fun fundraisers and friend-raisers to engage alumni. Rockhurst High School has enjoyed great success with two programs: the Kelley Wilson Barbeque Contest and the Alumni Yard Games. Mark Blanck, Director of Major Gifts and Mike Comiskey, Director of Alumni Events, share how these events originated and how they have grown from a handful of participants to major events for the school.

B: U.S. Giving and Tax Law

Corboy Law Center: Kasbeer Hall

With the Tax Cuts and Jobs Act now law, your donors may be looking at their finances and wondering about their charitable giving. Kevin Noonan, Principal, Much Shelist, P.C. and member of St. Ignatius Chicago's Gift Planning Council will provide a summary of the new law's effect on charitable giving deductions and sample ways to maximize charitable giving.

C: Nativity & Cristo Rey Roundtable

Corboy Law Center: CLC 206

Elizabeth Wambui, Director of Advancement, Nativity School of Worcester, and Steve Holte, Vice President Advancement, Christ the King Jesuit College Preparatory School, lead a general discussion of the issues unique to the Nativity and Cristo Rey models. Do you still need help with a project? Is there a question you want addressed but has not been yet? Here is your opportunity.

D: Fundraising Effectiveness and Giving Index

Corboy Law Center: CLC 208

This donor-centered look at giving provides insight into areas of improvement in all Advancement operations. The discussion -- focused on how to use the lessons learned to improve your relationships with donors in strategic, measurable and repeatable ways -- will be the emphasis of this session. Eleven Jesuit schools participated in an initial JSN High School Giving Index screening program this past spring and a summary of those results will be presented. Ralph Nardini, Principal, The Nardini Group and Thom Digman, Principal, The Digman Network will share ways to integrate this new way of analyzing your donor giving history.

4:00 pm

Conference Summary

Corboy Law Center: Kasbeer Hall

A last opportunity for us to gather together as a network, exchange business cards and to follow up on some of the good ideas you heard throughout the conference.

4:30 pm

Adjournment

Schools are free to plan their own Alumni events in the evening.