2019 Advancement Academy Presents: Sessions & Schedule

MONDAY, DEC. 9

10:00 a.m. Opening plenary session

10:45 a.m. Breakout Sessions #1

- **Philanthropy in America: What’s Going on and Where Do We Go from Here?**
  *Presenters: Peter Hoskow, Managing Director, and Lindsay Marciniak, Senior Vice President, CCS*
  Giving USA numbers are in and giving is up. Or is it? The first year of the tax cuts and changes in deductions produced mixed results. What do the numbers tell us and where do we need to focus our efforts?

- **Structured for Success**
  *Presenter: John Tannous, Director of Research Delivery, EAB*
  New research from the Education Advisory Board shows that effective and productive organizational models increase philanthropy. This session will help you identify what you are doing well and potential areas for improvement.

- **Pulling Back the Media Curtain**
  A media expert will explain the issues facing the news media today. Learn about the challenges they face, what they need from you, and how you can apply that knowledge to help you earn “earned media.”

- **Technology Overload**
  *Presenter: Mary McNaughton-Cassill, Ph.D., Professor of Psychology, UT San Antonio*
  The steady stream of technology and media can be overwhelming. This session will help you sift through the information overload to find what is useful and take control of what's consuming your time and attention.

12:00 p.m. Luncheon and Guest Speaker

1:30 p.m. Breakout Sessions #2

- **Let’s Get Involved: Engaging the Next Generation of Alumni**
  *Presenter: John Tannous, Director of Research Delivery, EAB*
  While dollars are up, alumni *participation* is down nationally and across UT institutions. If we don’t act now, we could miss a generation of donors. This session will introduce activities and tips to help improve alumni engagement at your institution.
from peers who are doing it well.

- **Help Me Help You**
  A panel of corporate givers will share what they need from institutions in today’s evolving world of corporate relations. Learn how to make it easier for them to engage with—and support—your institution.

- **Beyond Posting: Getting Strategic about Social Media**  
  *Presenter: Kami Watson Huyse, CEO, Zoetica Media*  
  You tweet and post, use images and emojis and interact with followers. But what difference does it make? This session will help you develop, implement and measure social media strategies to achieve your communication goals.

- **Leading Managers**  
  *Presenter: Bentz Whaley Flessner (BWF) Principal*  
  Having a poor manager is one of the main reasons cited for employee turnover. But new managers may not have the training or skills needed before taking on a supervisory role. This session will provide leaders with ways to help new managers succeed and keep their teams happy and productive.

  **2:45 p.m. Breakout Sessions #3**

- **Building a Strong Foundation**
  Foundations account for more than 35% of all cash received among UT institutions. A panel of foundation representatives will discuss how to strengthen your relationship with them and develop a compelling proposal that supports their mission.

- **Can We Count It?**  
  *Presenter: Darrow Zeidenstein, Senior Vice President & Chief Development Officer, UT MD Anderson Cancer Center*  
  The Council for the Advancement and Support of Education (CASE) will soon debut its 5th edition of *Reporting Standards & Management Guidelines*. This session, presented by a member of CASE’s working group, offers a sneak preview into what’s on the horizon and how to make sure gift data and donor count are being captured and reported as accurately as possible.

- **Tell Me a Story**  
  *Presenter: Mike Barzacchini, Marketing Services Director, Harper College*  
  Mike Barzacchini has built a nearly 30-year career powered by discovering, creating and sharing stories that connect people and advance strategic priorities of universities. He regularly shares his expertise with others as a regular presenter at CASE and other higher ed conferences and workshops. Development and communications professionals alike may benefit from hearing how engaging and compelling messages in digital and print communications resonate with broad constituencies.
• **Creating Creativity**  
  *Presenter: Doreen Lorenzo, Assistant Dean, School of Design and Creative Technologies, UT Austin*
  Whether you're looking for a new way to make the ask, write a news release or design a brochure, it is sometimes tough to get the creative juices flowing. In this session, learn ways to generate creativity and inspire results.

4:00 p.m. **Breakout Sessions #4**

• **Giving Under the Influence**  
  *Presenter: David Kremer, Partner, Shartsis Friese*
  As donors age, they may lose the ability to make decisions about charitable gifts. For development officers, that could lead to allegations of undue influence. Learn how to protect gifts while maintaining the highest ethical standards when working with aging donors and their families.

• **Stay with Me: Stewardship 2020**  
  *Presenter: Bentz Whaley Flessner (BWF) Principal*
  The old adage holds true, “Your best donor is your current donor.” There is fierce competition for donors, so make sure you keep the ones you have by providing the best donor experiences, events and engagement opportunities. This session will share best practices and strategies for donor retention.

• **Follow the Rules (of Grammar)**  
  *Presenter: Ellen Jovin, Principal, Syntaxis*
  The rules of grammar are vast, and we all need a little help following them now and then. Ellen Jovin, a self-described “grammar freak,” published author and founder of a New York City-based communication skills training firm, will discuss how to eliminate common mistakes and to write with greater precision, professionalism and authority. No matter how good you are now, these punctuation, style and business tips will make you a better and more successful writer.

• **To Serve and Protect**  
  *Presenter: Michael J. Heidingsfield, Director of Police, UT System*
  The UT System Director of Police leads the third largest state law enforcement agency in Texas, ensuring campus police are ready for any situation, from an active shooter to dealing compassionately with an assault victim. But the police are not the only ones expected to communicate about campus safety. This session will equip you to communicate more effectively with students, parents, patients, donors, faculty and the community about possible safety concerns.
8:00 a.m.  Breakfast & Roundtable Discussions with your development, advancement and communications peers from across the UT System

9:15 a.m.  Breakout Sessions #5

• To Infinity and Beyond: Drafting Gift Agreements that Will Stand the Test of Time  
  *Presenter: Marcia Inger Navratil*  
  A well-drafted gift agreement doesn't just address the circumstances when a donor makes a gift—it also takes into account the donor's long-term intent, the current and future needs of the institution and the relevant legal standards that govern institutional management of gift funds. During this session, you will hear real-life examples that will help you understand how to craft a comprehensive gift agreement that will work now and in the future.

• Building a Pipeline to Keep the Funds Flowing  
  *Presenter: Ruffalo Noel Levitz Principal*  
  No matter how busy and successful you are with current donors, future success depends on identifying and cultivating the next wave of major donors. This session will help you better balance closing gifts, cultivation and discovery work; use performance metrics to encourage pipeline development; and implement a plan for an ongoing funding flow.

• Building Reporter Relationships  
  *Presenters: Lindsay Ellis, The Chronicle of Higher Education; Shannon Najmabadi, Texas Tribune; Jena Heath, Associate Professor of Journalism and Digital Media, St. Edward’s University*  
  State and national higher education reporters and a faculty adviser for a student newspaper will share insights for working more effectively with the journalists who cover your institution, including student reporters.

• Find and Keep Good Talent  
  *Presenter: Deb Taft, CEO, Lois Lindauer*  
  Turnover is expensive, leads to lower initial productivity as new hires are brought on board, and results in lost relationships and momentum. Unreasonable expectations, poor management and work-life balance are major causes for leaving. What can your institution do to retain you best talent and help them succeed?

10:30 a.m.  Breakout Sessions #6

• It’s Complicated: Going Beyond the Checkbook to Maximize Donor Giving  
  *Presenters: Amanda Brown Irving, Executive Director of Gifts and Estate Planning, UT Austin - moderator; Geoffrey Richards, Assistant Director of Real Estate, UT System; Joe Hancock, Vice President and General Counsel, HighGround*  
  Sophisticated donors do more than write checks. Learn how to help them make the most of their generosity by understanding what’s involved in the different types of gifts available, including real estate, oil and gas holdings, stocks and donor-advised funds.
• **It's a Whole New World in Fundraising**  
  *Presenter: Ruffalo Noel Levitz (RNL) Principal*
  Donors can now choose when and how they want to receive information. The methods for communicating our stories and appeals are rapidly multiplying. Learn how to develop, implement and measure a communications plan for your appeal strategy.

• **Managing Tomorrow’s Issues Today**  
  *Presenter: Julie Peterson, Peterson Rudgers Group*
  Crisis management is one thing. Managing issues before they reach crisis mode is another. In today's never-ending news cycle, it's more important than ever to proactively put together the plans and people necessary to navigate potential communication challenges.

• **Planning to Plan**
  You’ve planned and implemented the perfect event. But how does it fit into your overall development and communications goals? And what happens next? This session will help you be more strategic in planning the communications and outreach needed before, during and after an event to maximize the impact on your institution’s overall success. You’ll also learn tips for keeping recurring events fresh and relevant

  **11:45 a.m. Chancellor’s Awards Luncheon**
  Join Chancellor J.B. Milliken at the closing luncheon as he presents awards for exceptional performance in fundraising, advancement services, media relations, communications, and events. And be on the lookout soon for how you can nominate your institution for awards in one or more of these categories.

  **1:30 p.m. Adjourn**