# Conference Schedule at a Glance

## Sunday
- **8:00 AM – 5:00 PM**
  - Registration open
- **8:30 AM – 3:45 PM**
  - Leadership Institute *(see page 5)*
- **10:00 AM – 3:45 PM**
  - Pre-Conference Workshops *(see page 5)*
- **12:00 PM – 1:30 PM**
  - Lunch for Workshops and Leadership Institute
- **2:30 PM – 3:45 PM**
  - Sessions *(see pages 8–9)*
- **2:00 PM – 6:30 PM**
  - Exhibit Hall Open
- **4:00 PM – 5:00 PM**
  - Keynote Address, Bill Strickland
- **5:00 PM – 6:30 PM**
  - Opening Reception with Exhibitors
- **6:30 PM – 9:00 PM**
  - March Madness on the Water with Spirit Cruises, Pier 5, Inner Harbor

## Monday
- **7:00 AM – 4:00 PM**
  - Registration Open
- **7:30 AM – 8:45 AM**
  - Continental Breakfast Roundtables
- **8:00 AM – 5:00 PM**
  - Exhibit Hall Open
- **9:00 AM – 10:15 AM**
  - Sessions *(see pages 10–12)*
- **10:15 AM – 10:45 AM**
  - Break
- **10:45 AM – 12:00 PM**
  - Sessions *(see pages 12–14)*
- **12:00 PM – 1:30 PM**
  - Luncheon and Keynote Address, Gail J. McGovern
- **10:45 AM – 12:00 PM**
  - Sessions *(see pages 14–16)*
- **12:15 PM – 1:30 PM**
  - Luncheon and Keynote Address, Gail J. McGovern
- **1:30 PM – 2:45 PM**
  - Sessions *(see pages 14–16)*
- **2:45 PM – 3:15 PM**
  - Break
- **3:15 PM – 4:30 PM**
  - Sessions *(see pages 16–18)*
- **6:00 PM – 7:00 PM**
  - Accolades & Awards Cocktail Reception
- **7:00 PM**
  - Accolades & Awards Dinner Gala

## Tuesday
- **7:00 AM – 9:00 AM**
  - Registration Open
- **7:30 AM – 8:45 AM**
  - Annual Meeting Breakfast
- **8:00 AM – 12:00 PM**
  - Exhibit Hall Open
- **9:00 AM – 10:15 AM**
  - Sessions *(see pages 19–21)*
- **10:30 AM – 12:00 AM**
  - Sessions *(see pages 21–22)*
- **12:00 PM**
  - Conference closes

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Special thanks to **Triangle Printing** for sponsoring this conference program book and to **studio-e** for designing the conference identity and program.
Welcome to the Baltimore waterfront, and your annual CASE District conference. After a four-year hiatus we have returned to Baltimore and look forward to giving you the opportunity to network with colleagues, capture new ideas and have some fun. Whether you are an alumni, development, marketing and communications professional or Chief Advancement Officer from a large, small, public or private institution, you will find excellent session topics of interest to you.

I would like to express my extreme gratitude to all of you who have invested so much time and talent to make this a great professional development experience. From our hardworking and dedicated volunteer conference committee to our generous sponsors, our speakers, and our educational partners, this great conference simply could not happen without your commitment.

Now, on to the conference…Over the next several days you will have the opportunity to:

...attend a pre-conference workshop. Focused pre-conference workshops for new professionals and independent school professionals will allow you to take advantage of small group presentations and discussions with colleagues who share your circumstances. New this year is the Leadership Institute, designed to provide interactive leadership assessment and training for advancement professionals aspiring to higher leadership positions in their institutions.

...hear two outstanding keynote speakers: Bill Strickland and Gail McGovern. Both are experienced leaders who can speak to the importance of leadership in our institutions, in education and society.

...attend a full day of sessions geared specifically for chief advancement officers...

...attend almost 100 conference sessions on topics relevant to all aspects of advancement work. Many of this year’s sessions are cross-disciplinary: alumni and development, development and marketing and communications.

...have some fun with your colleagues at March Madness on the Water. Enjoy the beautiful Inner Harbor at night from a Spirit Cruise ship docked at Pier 5. Great food, beverages and music and a little March madness will set the tone for you to connect with old friends and new.

...visit with our sponsors and exhibitors, who offer products and services we need to do our work well. The exhibit hall will be open throughout the conference for your convenience.

...take advantage of special resources during the conference: the wireless Internet café, located in the Exhibit Hall, will be open throughout the conference to periodically check your e-mail and submit your conference evaluations; the Literature Gallery in the Registration Rotunda where you will be able to browse through publications from wide variety of District II institutions; the best of the best—materials from this year’s Accolades winners will be on display in the Grand Foyer outside the Exhibit Hall; career opportunities—plan to visit the CASE career services booth in the Exhibit Hall.

...recognize and celebrate the best of the best of District II at the Accolades and Awards Gala Monday evening in the Harborside Ballroom.

Whether this is your first conference or your 10th, you will find many opportunities to learn new skills, engage in topical discussions with your peers, build your professional network and celebrate the achievements of many. All of us on the conference committee wish you a great time in Baltimore. If we can be of assistance to you at any time during conference, please don’t hesitate to ask a conference committee member—look for a “Conference Committee” ribbon attached to their nametag.

Thanks for joining us to Chart the Future.

Sincerely,

Julie Siler
Conference Chair
Director, Alumni Relations and Annual Fund
Shepherd University
Shepherdstown, WV
Registration

**GRAND BALLROOM ROTUNDA**

**Saturday, March 21**
2:00 PM – 6:30 PM

**Sunday, March 22**
8:00 AM – 5:00 PM

**Monday, March 23**
7:00 AM – 4:00 PM

**Tuesday, March 24**
7:00 AM – 9:00 AM

Name Badges
Your name badge provides you entry to program sessions, the Exhibit Hall, the Sunday night opening reception and conference meals. A wristband is required for the Sunday night Spirit Cruises Special Event and a ticket is required for the Accolades and Awards Gala Dinner.

Volunteer to Make a Difference!

**REGISTRATION DESK**
Make the most of the Conference by getting involved! Charting the Future is a volunteer-driven endeavor. By lending a hand during the Conference, you not only contribute to its success, but also have a perfect opportunity to meet others in your field. Volunteer positions require only one or two hours of work, leaving plenty of time to enjoy sessions and social events. If you are interested in volunteering, please visit the registration desk.

Exhibit Hall

**GRAND BALLROOM V AND GRAND FOYER WEST**
Experience the better-than-ever Exhibit Hall—one-stop shopping for three days only. We have gathered a fabulous variety of exhibitors under one roof, offering state-of-the-art Internet and computer technologies, recognition products, travel programs, eye-catching publications, and much, much more. You will have many opportunities throughout the conference to visit with suppliers, consultants, and vendors—allied professionals eager to help you explore new products, services, and the latest technologies. Our exhibitors are critical to the success of our conference. Please take the time to visit their booths and learn more about their products.

**EXHIBIT HALL HOURS OF OPERATION**

**Sunday, March 22**
Exhibit Hall Opens 2:00 PM – 6:30 PM
Opening Reception in Exhibit Hall 5:00 PM – 6:30 PM
Exhibit Hall Closes for the Day 6:30 PM

**Monday, March 23**
Exhibit Hall Opens 8:00 AM
Morning Break with Exhibitors 10:15 AM – 10:45 AM
Afternoon Break with Exhibitors 2:45 PM – 3:15 PM
Exhibit Hall Closes for the Day 5:00 PM

**Tuesday, March 24**
Exhibit Hall Opens 8:00 AM
Exhibit Hall Closes 12:00 PM
Opening Reception with Exhibitors

GRAND BALLROOM SALON V & GRAND FOYER WEST

Sunday, March 22
5:00–6:30 PM
Mix and mingle with colleagues and exhibitors at our Opening Reception to officially kick-off the District II CASE Conference 2009: Charting the Future.

March Madness on the Water

561 LIGHT STREET (PIER 5)

Sunday, March 22
6:30–9:00 PM
Conference attendee fee $45
Conference non-attendee fee $90

Come aboard and join your colleagues as we enjoy the sights and sounds of the Inner Harbor aboard Spirit Cruises. We will be docked at Pier 5, just a short walk from the Hotel. Don’t forget to wear your school colors to celebrate the beginning of March Madness. DJs, dancing, food stations and beverages will be provided.

Accolades and Awards Gala

HARBOURSIDE BALLROOM A–C

Monday, March 23
6:00 PM Cocktails
7:00 PM Dinner
Conference attendee fee $80
Conference non-attendee fee $130
Black tie optional

Join us for this year’s Gala as we recognize individuals and institutions. Awards will celebrate outstanding individual contributions to the advancement of education through volunteer leadership and professional achievement, as well as outstanding achievement in communications and marketing.

Separate registration is required for this event. If you did not pre-register, a limited number of tickets will be available for sale at Registration until Monday at 4:00 PM.

Case District II Awards 2009

Chief Executive Leadership Award
Stuart Rabinowitz, Hofstra University

Professional of the Year Award
Robert V. Woodside, Duquesne University

Robert L. Payton Award for Voluntary Service
William “Bill” Ladd, Skidmore College

Rising Star Award
Lauren Mossman, Sidwell Friends School

Thank you to our Awards Gala Sponsors:

PW Feats
Event Production Services

Honor Craft Incorporated
Gala Awards

IEP—Innovative Event Production
Audio Visual Services

GCF Marketing and Communication for Education
Gala Program Design
Opening Keynote:
The Art of Leadership
GRAND SALON VI

Sunday, March 22
4:00 PM – 5:00 PM

Bill Strickland
President and CEO
Manchester Bidwell Corporation
Sponsored by University of Rochester

Keynote speaker Bill Strickland, a MacArthur Foundation “Genius” grant winner, will address the topic of personal and organizational transformation in The Art of Leadership. For 30 years, Strickland has transformed thousands of lives around the topic of ethical leadership and reshaped the business of social change. As president and CEO of the Manchester Bidwell Corporation, a jobs training center and community arts program, he and his staff work with corporations, community leaders, and schools to give disadvantaged kids and adults opportunities to build a better future. Strickland has shared his message of leadership, self-worth and the intrinsic ability in all of us to achieve remarkable transformation with thousands.

Monday Luncheon Keynote:
Weathering the Storm
GRAND SALON VI

Monday, March 23
12:15 PM – 1:30 PM

Gail J. McGovern
President and CEO
American Red Cross

Every year the American Red Cross responds to over 70,000 disasters across the country—everything from hurricanes to house fires. But how does an organization known for battling disasters weather an economic storm? Gail J. McGovern will discuss the steps the American Red Cross is taking to strengthen its mission delivery today and position itself for growth when the economy recovers.

McGovern was named President and CEO of the American Red Cross in April 2008. McGovern, who held top management positions at AT&T and Fidelity Investments, has experience running large organizations in competitive industries, and a track record for improving business performance and service delivery to the public. McGovern joined the faculty of the Harvard Business School in June 2002 where she taught Marketing to first year students in the MBA program and Consumer Marketing to second year students. Prior to joining Harvard University, McGovern was president of Fidelity Personal Investments, a unit of Fidelity Investments, serving 4 million customers with $500 billion in assets. In this role she had overall responsibility for Fidelity’s retail mutual fund and brokerage businesses and was a member of Fidelity’s Operating Committee.

McGovern joined Fidelity in September 1998 as president of Distribution and Services. Previously, she was Executive Vice President for the Consumer Markets Division at AT&T, responsible for AT&T’s $26 billion residential long distance service and largest business unit. She began her career at AT&T as a computer programmer and moved up through sales, marketing and general management assignments, including chief strategist of AT&T’s Communications Services Group and Executive Vice President of the $25 billion Business Markets Division. Born in 1952, McGovern received a Bachelor of Arts degree in quantitative sciences from Johns Hopkins University in 1974. She received an MBA from Columbia University in 1987. McGovern has been named alumna of the year at both universities. She is a member of the Board of Trustees of Johns Hopkins University, the Board of Directors of the Hartford Financial Services Group and the Board of Directors of DTE Energy. McGovern was recognized by Fortune magazine in 2000 and 2001 as one of the 50 most powerful women in corporate America.
Leadership Institute
Pre-Conference Workshop

GRAND SALON II

By invitation only.

8:30 AM – 3:45 PM
The Leadership Institute is a one day, pre-conference workshop designed for professionals desiring to increase their leadership potential within their District II institutions. Through the use of an online assessment tool and small-group discussions and exercises, participants will have the opportunity to explore their personal leadership identity, learn about effective leadership, practice learned leadership behaviors, and plan for on-going personal leadership development. The Leadership Institute is ideal for individuals who seek to learn more about their personal leadership style and/or to fine-tune their leadership skills and behaviors.

Speaker: Timothy Edris

Timothy “Tim” Edris is a team and leadership development specialist. He has over a decade of experience designing and implementing corporate and university training programs ranging from 10 person team-building sessions to 120 person managerial leadership programs. Tim is a consultant with Emerging Leaders Institute, a boutique organizational leadership firm. He has a Masters of Science of Organizational Leadership as well as certifications in various Organizational Development tools and instruments.

Tim is a coach who knows how to develop the potential of the people he mentors. He has coached Vice Presidents and middle managers alike. He has a knack for creative design and the execution of organizational learning experiences. He develops experiences that are memorable and help transfer learning to rising leaders’ hearts and minds. Tim has the ability to uncover the truth about the culture of an organization’s leadership—a skill that illuminates the way to healthy leader development. In addition to more creative means of teaching, he has taught in more traditional settings at the collegiate level and other adult environments for over 12 years.

New Professional
Pre-Conference Workshop

GRAND SALON III

10:00 AM – 3:30 PM
Starting a new career in institutional advancement? Or considering one after graduation? This workshop is designed for you! Interact with other newcomers, build your professional network, and be introduced to the profession by a group of seasoned professionals. This workshop is designed to cross-train you in all the advancement disciplines (alumni relations, development, communications, etc.) and provide tools to hit the ground running. Jim Langley, Vice President for Advancement at Georgetown University, will deliver the kick-off presentation. Get ready to “chart the course” for your new career in advancement!

Workshop Chairs:
Matthew Lambert, Executive Director Development and Engagement, Georgetown University
Ivan A. Adames, Associate Director, Regional & International Programs, Johns Hopkins University

10:15 AM – 11:10 AM
Opening Keynote Presentation: Essential Leadership for Newcomers to Advancement
James Langley, Vice President for Advancement, Georgetown University

11:15 AM – 12:00 PM
Advancement Communications: Key Issues and Tips for Success
Wendell Collins, Director of Corporate Relations, Princeton University’s Bendheim Center for Finance
Tom Hanrahan, Director of College Relations, Lebanon Valley College

12:00 PM – 1:30 PM
Lunch with CASE District II Board

12:20 PM – 1:20 PM
New Professionals Keynote Address: A Global View of Advancement
John Lippincott, President, Council for Advancement and Support of Education

1:30 PM – 2:25 PM
Alumni Relations 101: A Crash Course for New Professionals
Jayanne Hayward, Director of Alumni Relations, Lebanon Valley College
Sandra Gray, Executive Director of Alumni Relations, Johns Hopkins University

2:30 PM – 3:25 PM
Development & Fundraising: The Building-Blocks
Tilghman Moyer, Assistant Vice President for Development, Temple University
David Sowers, Director of Major Gifts, Franklin & Marshall College

Independent School
Pre-Conference Workshop

GRAND SALON IV

10:00 AM – 3:30 PM
While some of the general conference offerings will be of interest to Independent School folks, all of this pre-conference is dedicated to providing support and information on issues and conditions specific to school advancement and development professionals. Speakers and session topics are selected based on your feedback to ensure the workshop is tailored to attendees’ needs.

10:00 AM – 12:00 PM
Reflections on the Economy (interactive panel discussion)
Discuss how the economy has reshaped some of what we are doing in independent school advancement with a distinguished panel of your peers.

1:30 PM – 3:00 PM
Redefining Boundaries: Reaching our Young Constituents
Still trying to unlock the potential of your young alumni before they shift affiliation to the college and university advancement machines? David Eldridge and his student and alumni team will share the programs and strategies they launched that are now creating a strong and lasting loyalty among their young alumni.

Speaker: Dr. David Eldridge
Westtown School
Sunday, March 22

8:30 AM – 3:45 PM
Leadership Institute (page 5)

10:00 AM – 3:45 PM
Pre-Conference Workshops
New Professionals, Independent Schools (page 5)

2:30 PM – 3:45 PM
Keeping the Marriage Happy...Collaboration between the Offices of Development and Alumni Programs (page 8)
Increasing Event Participation (page 8)
Making the Most of Supplied Digital Photography (The Good, the Bad, the Ugly) (page 8)
Moving from Print to Electronic Publications (page 8)
Navigating Your Development Career (page 9)
Campaign Communications: Attracting Dollars on a Dime (page 9)
Do Students Make the Best Fundraising Case? (page 9)
Class Gifts that Establish the Future (page 9)

4:00 PM – 5:00 PM
Keynote Address: The Art of Leadership
Bill Strickland (page 4)

Monday, March 23

9:00 AM – 10:15 AM
Alumni & Career Services: A Great Partnership (page 10)
Alumni Travel: Your Passport to Friendraising and Fundraising (page 10)
Alumni Relations & the Campaign: Square Peg, Round Hole? (page 10)
Digital Photography—When to Call in a Pro (page 10)
Boutique Redesigns on a Budget (page 11)
Building the Brand from Inside Out: Using Collaborative Communications Strategies to Facilitate Change (page 11)
Expanding Your Pipeline: Building Effective Young Alumni Giving Programs (page 11)
Raising Money in a Web 2.0 World (page 11)
SuCCess is Spelled with 3 Cs: Contact, Cultivate, and Close (page 11)
Extreme Makeover/Annual Giving Edition (page 11)
Gifts of Real Estate—How to Keep Your Donor and Your CFO Happy (page 12)
Take the “Pain” out of Campaign: Include the Back Office in the Front End (page 12)

10:45 AM – 12:00 PM
Ever Better: Planning and Marketing a Multi-Day, Multi-Purpose, All-University Weekend (page 12)
Alumni Boards—A Volunteer and Staff Partnership (page 12)
Keeping the Marriage Happy...Collaboration between Development and Alumni Programs (page 12)
So You Want to Be in Charge? Removing Roadblocks to Healthy Crisis Communications (page 12)
The Impact of Integrated Marketing Communications on Leading US Colleges and Universities (page 13)
PR Strategy in the Age of Networks (page 13)
The Planned Giving Easy Button (page 13)
How to Integrate Online Giving with Your Annual Fund... And Track It! (page 13)
The Formula for Hiring the Right Team (page 13)
Writing for Donors Clearly and Persuasively (page 13)
Board Effectiveness in Raising Philanthropic Support: The Role of the Board and CAO (page 14)
Successful Development Work from a Regional or Home Office (page 14)
Tuesday, March 24

9:00 AM–10:15 AM
How to Choose an Affinity Partner (page 19)
Building a Parent Relations Program: Reflections in the Third Year (page 19)
Programs and Considerations for a Graying Population (page 19)
What Can Higher Education Learn from Barack Obama? (page 19)
Demographic & Economic Realities: Working Smarter for Every Admission/Retention (page 19)
Strategic Budgeting for Future Advancement Success (page 20)
Creating WOW! Experiences for Leadership and Major Donors (page 20)
The Power of Scholarships: Creating a Scholarship Development Office on Your Campus (page 20)
Navigating Foundations at a Large Institution (page 20)
Loyal Giving Societies: Education, Recognition and Retention (page 20)
Making the Most of Prospecting Travel and Volunteer Management with New Technologies (page 21)

10:30 AM–12:00 NOON
Meet the Veeps (page 21)
Volunteer Management and Recognition (page 21)
Going Green: What Alumni Relations Can do to Help Save the Planet (page 21)
Brand Identity: What’s in a Brand? (page 21)
Changing the Communications Culture (page 22)
Beyond the Launch: Maintaining Capital Campaign Momentum through Integrated Marketing Communications (page 22)
Do Students Make The Best Fundraising Case? (page 22)
Data Mining and Predictive Modeling: How 10 Schools found Success with the Johns Hopkins Model (page 22)
Gift Planning Front and Center: Positioning Gift Planning to Maximize all Philanthropy (page 22)
Creating an Alumni Giving Plan that Works (page 22)

March 22–24, 2009

ChARTING THE FUTURE
Sunday, March 22

2:30 PM – 3:45 PM SESSIONS

7:00 AM – 5:00 PM
Registration
GRAND BALLROOM

8:30 AM – 4:00 PM
Leadership Institute
Pre-Conference Workshop
GRAND SALON II

10:00 AM – 3:30 PM
New Professionals
Pre-Conference Workshop
GRAND SALON III

10:00 AM – 3:30 PM
Independent Schools
Pre-Conference Workshop
GRAND SALON IV

12:00 PM – 5:00 PM
Internet Café
GRAND BALLROOM V

2:00 PM – 6:30 PM
Exhibit Hall
GRAND SALON V & GRAND FOYER WEST

ALU 2:30 PM – 3:45 PM
Keeping the Marriage Happy...
Collaboration between the Offices of Development and Alumni Programs
BRISTOL
Unlock the secrets to a strong and healthy marriage between the Offices of Development and Alumni Programs. Learn easy ways to enhance relationships between inter-office professionals and to utilize departmental resources and strengths to maximize events and projects. Topics will include reunion programs, recent graduate outreach, prospect assessment, and more.
Jayanne Hayward, Director of Alumni Programs, Lebanon Valley College
Todd Snovel, Assistant Director of Annual Giving, Lebanon Valley College

ALU 2:30 PM – 3:45 PM
Increasing Event Participation
CHASSEUR
Event participation is key for all institutions, whether the intended audience is a segmented/affinity group or not. With budgets under increasing scrutiny for “fat,” and competition in an Advancement division for Development/Campaign priorities, events must provide for ROI. This presentation offers a practical, integrative approach to planning and promotion for high yield events.
Sandra Sarno Caroll, Executive Director of Alumni Relations, Wilkes University
Mirko Widenhorn, Director of Alumni Relations, Wilkes University

COM 2:30 PM – 3:45 PM
Making the Most of Supplied Digital Photography (The Good, the Bad, the Ugly)
DOVER A
Digital cameras have turned everyone into photographers (which is good and bad) and has caused a proliferation of bad digital imagery that publications offices routinely are provided with and use in their high quality publications. This session will touch on some quick Photoshop tips that can basically or dramatically alter the appearance and quality of photographs so that they do not ruin your publication. Attendees are encouraged to bring printed samples of their own magazines or publications to illustrate their personal digital photography challenges and to assess areas where improvements can be made.
John Consoli, Creative Director of University Magazines & Director of Photography, University of Maryland

COM 2:30 PM – 3:45 PM
Moving from Print to Electronic Publications
DOVER B
Whether you want to protect the environment or just cut costs in these difficult financial times, one option to consider is moving publications from a traditional print medium to primarily electronic format. This session will discuss strategies for using the web and e-mail to engage various audiences (students, faculty/staff or alumni) in order to tell a school’s story and convey information.
Paul Dempsey, Director of Electronic Communication, Dickinson College
Navigating Your Development Career
GRAND BALLROOM SALON IX
Are you eager to climb the development career ladder? Whether you are an established gift officer, or new to the field of development, this session will give you fresh ideas for navigating the next course in your development career. Attend this session to hear from development directors and gift officers about their path to success. Each presenter will share information about their unique career path and provide tips to help you thrive in the fundraising profession!

Shabina Bahl, Director of Development, James Buchanan Brady Urological Institute, Johns Hopkins Medicine
Michael Hibler, Senior Associate Director, Sidney Kimmel Cancer Center, Johns Hopkins Medicine
Lisa Seischab, Regional Director of Major Gifts, University of Rochester

Gail L. Freeman, Founder and President, Freeman Philanthropic Services, LLC (FPS)

Campaign Communications: Attracting Dollars on a Dime
GRAND BALLROOM SALON VIII
In fall, 2007, Adelphi University launched its first comprehensive campaign in its 111-year history. Without a history of fundraising campaigns, we faced the challenge of both educating and inspiring donors at all levels and from a variety of backgrounds, many of whom attended the University as commuter students or who had not been in touch with their alma mater for years. We’ll discuss how we created well received materials and events, including the case statement, campaign video, campaign Web site, campaign launch celebration, annual fund and Kresge capital challenge grant mailings, and campaign media plan on a very modest budget and have since used resources carefully to maintain the momentum and donor involvement. We’ll illustrate clear successes and review lessons learned.

Flavio Bollag, Director of Development Programs and Planning, Adelphi University

Bonnie Eissner, Communications Director, Adelphi University

Do Students Make the Best Fundraising Case?
GRAND BALLROOM SALON X
This session will explore the many uses of the students in a capital campaign. We will discuss the process and benefit of creating a Student Alumni Council; the use of students on donor visits, solicitations and stewardship; how to select appropriate students and where you can find them in the student body; and examples of student involvement in development and campaign related events.

Jason Curtin, Director of Alumni Relations and Annual Giving, Salisbury University
Dr. Rosemary Thomas, Vice President for University Advancement and Executive Director, Salisbury University Foundation
Amy Gilbert, President of the Student Alumni Council, Salisbury University

Class Gifts that Establish the Future
DOVER C
Two professional schools at the University of Maryland, Baltimore (Law and Social Work) have implemented successful, yet different, class gift strategies resulting in significant increases in participation. Staff members will examine the benefits and challenges associated with each approach and also discuss working collaboratively this year on a class gift competition between the schools. Student leaders who worked on these projects will join the panel.

Erik Fulwider, Director of Alumni Relations & Annual Giving, University of Maryland School of Law
Alethea Schmall, Assistant Director of Alumni Relations and Annual Giving, University of Maryland School of Social Work

Opening Keynote:
The Art of Leadership
GRAND SALON VI
Bill Strickland
President and CEO
Manchester Bidwell Corporation
Sponsored by University of Rochester

Opening Reception with Exhibitors
GRAND BALLROOM SALON V & GRAND FOYER WEST
Mix and mingle with colleagues and exhibitors at our Opening Reception to officially kick-off the District II CASE Conference 2009: Charting the Future.

March Madness on the Water
561 LIGHT STREET (PIER 5)
Come aboard and join your colleagues as we enjoy the sights and sounds of the Inner Harbor aboard Spirit Cruises. We will be docked at Pier 5, just a short walk from the Hotel. Don’t forget to wear your school colors to celebrate the beginning of March Madness. DJs, dancing, food stations and beverages will be provided.

Separate registration is required for this event. If you did not pre-register, a limited number of tickets will be available for sale at Registration until Sunday at 4:00 PM.
**Monday, March 23**

**9:00 AM–10:15 AM SESSIONS**

### 7:00 AM–4:00 PM

**Registration**

**Grand Ballroom**

### 8:00 AM–5:00 PM

**Exhibits**

**Grand Salon V & Grand Foyer West**

### 7:30 AM–8:45 AM

**Breakfast Roundtables**

**Grand Salon V**


### 12:15 PM–1:30 PM

**Monday Luncheon Keynote:**

**Weathering the Storm**

**Grand Salon VI**

**Gail J. McGovern**
President and CEO
American Red Cross

**Sponsored by Blackbaud**

### 8:00 AM–5:00 PM

**Internet Café**

**Grand Ballroom V**

**Exhibit Hall**

**Grand Salon V & Grand Foyer West**

### ALU 9:00 AM–10:15 AM

**Alumni & Career Services: A Great Partnership**

**Grand Salon VIII**

The presenters will share their current programs and on-going plans for offering alumni career services and support through institution partnerships, web services and social networking sites.

**Lynne E. Dillard**, Director, Director of Alumni Affairs and Foundation Special Projects, Harrisburg Area Community College

**Cynthia Hartman Robinson**, Director of Alumni Relations, Delaware County Community College

### 9:00 AM–10:15 AM

**Alumni Travel: Your Passport to Friendraising and Fundraising**

**Grand Salon IX**

Paris, Rome, the Mexican Riviera, Holland (Michigan), Baltimore...cruises, ballparks, art museums...the destinations are endless, as are the benefits and services of a university travel program. An overview of travel programs which includes an open discussion on staffing, budget, destinations, cultivating and stewarding constituents, hosting, and fundraising—almost everything you wanted to know and then some.

**Steve DiGuiseppe**, Executive Director of Alumni, Special Events and Data Management, Millersville University

**Mike Saraka**, Director of Alumni Relations, Slippery Rock University

### ALU 9:00 AM–10:15 AM

**Alumni Relations & the Campaign: Square Peg, Round Hole?**

**Grand Salon X**

The University of Pennsylvania launched a campaign in 2007 with “engagement goals” specifically assigned to the Alumni Relations office. The Penn case study will demonstrate the integration of alumni relations programs into a major institutional campaign. Participants will learn how to develop non-financial goals, implement new strategies, and measure success for qualitative goals such as alumni engagement and will explore in small groups how they might integrate alumni relations into a campaign, finding creative ways to fit the square AR peg into that round hole.

**Lynn Carroll**, Assistant Director, Classes and Reunions, University of Pennsylvania

### COM 9:00 AM–10:15 AM

**Digital Photography: When to Call in a Pro**

**Essex A**

A picture is worth a 1,000 words... so, what are YOUR pictures saying? Are you shooting yourself in the foot by producing lackluster publications with tired photography? We will discuss how to take the next step, whether you are in need of producing a fresh library of images or ratcheting up your publications. It is imperative that your branding images are honest and capture the spirit and promise of your institution. This is an interactive session where we assess your current photography and work in groups to determine if calling in a pro is the next best step in developing compelling imagery that can breathe new life into your publications and web presence. Photography is a major part of your brand, so take advantage of and plan to make the most of this opportunity. Please bring publication samples to discuss.

**John Consoli**, Creative Director of University Magazines and Director of Photography, University of Maryland
Boutique Redesigns on a Budget

Is your magazine looking as tired as you feel putting it together each issue? Is it time to kick it up a notch? See how one editor rejuvenated her magazine through a redesign that addressed not just looks, but process. In this session we’ll present a step-by-step guide, with illustrating graphics, showing how we created a brand-new structure for The Hill, without spending a fortune.

Kim Asch, Managing Editor, The Hill, McDaniel College
Rachel Morton, Rachel Morton Associates

Building the Brand from Inside Out: Using Collaborative Communications Strategies to Facilitate Change

In March 2006, Adelphi University broke ground on a $97-million campus enhancement project that would add a new Recreation and Sports Center and upgrade existing facilities. Adelphi’s Communications teams used this opportunity to partner with Athletics to develop a cohesive strategy and identity for its Division II programs. The process involved vetting and selecting a third-party firm; engaging with and seeking input from relevant campus partners about the goals; and maintaining open communication among all parties throughout the process.

Diane Moser, Director of University Promotion and Outreach, Adelphi University
Linda Romano, Senior Associate Director, Office of Promotion and Outreach, Adelphi University

Expanding Your Pipeline: Building Effective Young Alumni Giving Programs

In this session, we will discuss the benefits of developing young alumni programs in independent schools, focusing on joint development and alumni relations programs. Specifically, we will discuss why to begin such a program, going into detail of benefits of educating our future donors on how and why to give. Also, we will discuss the benefits of early involvement. Next, we will explain how we started this program from marketing, benefits levels, and even the importance of naming the program relative to the strengths of the school (academics, athletics, and arts). Finally, we will discuss who we involved in the process from both a staff and alumni standpoint. Looking back, we will also touch on some things we could have done differently, especially with the progress of social networking with younger alumni.

Greg Naleski, Vice-President for Development, NativityMiguel Network of Schools
Michael Hoffman, Associate Director of Development and Alumni Relations, Regional and International Programs Office, Johns Hopkins University

Raising Money in a Web 2.0 World

Institutions are increasingly looking for ways to engage new donors and offer an enhanced relationship to the alumni base. This session explores trends in online fundraising and focuses on new and emerging technology as a means to making giving more convenient from the alumni perspective. Through meaningful statistics, intriguing case studies and probing questions, this interactive presentation will bring practical new ideas to the forefront.

Richard McPherson, Founder, McPherson Associates
Penelope Chick, Major Gifts Officer, Cornell University
Gifts of Real Estate — How to Keep Your Donor and Your CFO Happy

GRAND SALON I

Does a tough real estate market mean difficult real estate gifts? Not necessarily! It does mean you have to be better equipped to market, evaluate and receive real estate gifts. In this session, we’ll give you the tools you need in your gift planning shed...the gift vehicles, tax implications, the essentials for acceptance policies, the players you need on your team, resources, pitfalls, and more. We’ll talk about the latest trends in real estate gifts and the effects of the economy.

Lynn Malzone Ierardi, Director of Gift Planning, University of Pennsylvania
Pamela Peters Arms, Associate Treasurer of the University of Pennsylvania

Take the “Pain” out of Campaign: Include the Back Office in the Front End

GRAND SALON IV

The case can be made for Advancement Services being included in the earliest stages of campaign planning. Development communications, inter-office transmittal forms, acknowledgements... and even the solicitor’s “sales pitch” can express the strategic needs of the institution. This session will explore how back office operations can help steer the campaign in later phases towards the strategic goals established at the start.

Brent Swinton, CFRE, Sr. Director for Advancement Services, Howard University

Branding and Marketing of Philanthropy

GRAND SALON VII

10:15 AM – 10:45 AM

Break

GRAND SALON V & GRAND FOYER WEST

Ever Better: Planning and Marketing a Multi-Day, Multi-Purpose, All-University Weekend

GRAND SALON VIII

The University of Rochester’s Meliora Weekend combines reunions, homecoming, and family weekend into a four-day affair. This session discusses balancing the needs and identities of individual schools, expressing key institutional messages, providing programming for all key constituencies, and engaging top donors and University leaders. The session also explores the operational and marketing challenges of the weekend—web design, multi-campus registration, staffing, logistics, and budgeting.

Jennifer Linton, Sr. Associate Director for Alumni Operations, University of Rochester
Kevin Wesley, Executive Director of Alumni Relations, University of Rochester

Alumni Boards: A Volunteer and Staff Partnership

GRAND SALON IX

Alumni Boards can be tremendous assets to your institution. But they are made up of volunteers—how much can we ask of our Boards? What is the role of staff with the Board? Who sets the agenda and prioritizes projects? Discover and discuss ways to ensure your Alumni Board—and your professional colleagues—find success.

Gary Olsen, Associate Vice President of Alumni Relations, Villanova University and Executive Director, Villanova University Alumni Association

Keeping the Marriage Happy... Collaboration between the Offices of Development and Alumni Programs

GRAND SALON X

Unlock the secrets to a strong and healthy marriage between the Offices of Development and Alumni Programs. Learn easy ways to enhance relationships between inter-office professionals and to utilize departmental resources and strengths to maximize events and projects. Topics will include reunion programs, recent graduate outreach, prospect assessment, and more.

Jayanne Hayward, Director of Alumni Programs, Lebanon Valley College
Todd Snovel, Assistant Director of Annual Giving, Lebanon Valley College

So You Want to Be in Charge? Removing Roadblocks to Healthy Crisis Communications

ESSEX A

When a crisis hits your campus will you be able to effectively deploy your emergency plan? Not if you haven’t built the proper relationships and communication templates in advance. This session focuses on the most common setbacks in a crisis situation, such as when outside law enforcement officers override university procedures and when senior administrators decide to override all of your careful planning. It also addresses whether you are ready to take charge, should you need to step in and do so.

Steven Healy, Director of Public Safety, Princeton University
Lauren Robinson-Brown, Assistant Vice President for Communications, Princeton University
The Impact of Integrated Marketing Communications on Leading U.S. Colleges and Universities

**ESSEX B**

As the higher education market becomes increasingly competitive, institutions are striving to build and reinforce their brands through integrated marketing communication (IMC). This presentation will examine the strategic process of IMC and its current application in 42 leading public colleges and universities in the US. This presentation will be based on research that received the CASE 2008 Alice L. Beeman Award for Outstanding Doctoral Dissertation in Communications and Marketing for Educational Advancement.

Dr. Dawn Edmiston, Assistant Professor of Management and Marketing, Saint Vincent College

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PR Strategy in the Age of Networks

**ESSEX C**

The rapid growth of social networks is challenging PR professionals not only to acquire new skills and techniques, but also to assume the new role of “community manager.” It’s no longer enough to produce quality communications; we now must actively drive the creation of new interactive and multimedia communities that engage our audiences as never before. This session will explore the new landscape of social media and provide a detailed ‘how-to’ on creating and managing online communities in Facebook, YouTube, LinkedIn, and Twitter. It will also examine the PR uses of other Web tools, such as Basecamp, Box.net, Slideshare, and blogs.

Daniel Forbush, Executive Director of Communications, Skidmore College

Charlie Melichar, Vice President for Public Relations and Communications, Colgate University

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The Planned Giving Easy Button

**Bristol**

This presentation is aimed at the novice Planned Giving officer and the Development officer with little or no exposure to PG. Brown will provide basic explanations of the most common PG instruments. Attendees will (hopefully) come away with a better understanding of these tools and the confidence to explain them to prospects. What’s the difference between a CRUT and a CRAT? Your new best friend — The Charitable Gift Annuity... How is a CRAT different from a Gift Annuity? Plus: Pooled Income Funds, Lead Trusts, & Bequests!

W. E. “Terry” Brown Jr., Executive Director of Planned Giving, University of Pittsburgh

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How To Integrate Online Giving with Your Annual Fund...And Track It!

**CHASSEUR**

Numerous studies have shown that direct mail and e-mail are no longer an either/or proposition in the Annual Giving plan. Integrating your campaign is the key to larger gifts and greater longevity of your donors. However, you won’t know which mixture is most successful for your market unless you track the various components and measure your results. Learn about successful techniques that boosted other programs’ efforts and how you can easily integrate — and track! — a similar strategy into your existing program for your webheads.

Valerie Lambert, Assistant Director of Development, Johns Hopkins Center for Talented Youth

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The Formula for Hiring the Right Team

**GRAND SALON I**

Faced with the challenge of increasing our staff from 37 to 51 people at Gettysburg College, we realized that we had to have an effective process in place to conduct multiple searches while continuing to meet fundraising goals. Therefore, we streamlined our hiring practices from A–Z to attract the best candidates for our team. In our session, we will present a detailed timeline and checklist that you can adapt to your institution and discuss ways to attract a diverse candidate pool. On the heels of over 100 interviews, we will reflect on many successes as well as share tips to avoid pitfalls along the way. We will also discuss effective roles different members of your organization can play in the process.

Ashlyn W. Sowell, Associate Vice President for Development, Gettysburg College

Susan E. Pyron, Executive Director for Special Projects, Gettysburg College

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Writing for Donors Clearly and Persuasively

**GRAND SALON II**

Clear and persuasive writing flows from clear thinking. This session will help you streamline your thinking, and give you a chance to practice and critique development writing. You’ll learn how to create compelling prose that inspires more prospects to volunteer and contribute.

David Murray, Assistant Dean for Advancement, Syracuse University Library
Board Effectiveness in Raising Philanthropic Support: The Role of the Board and Chief Advancement Officer

One of the many important roles of the Board of Trustees is raising philanthropic support for their respective institution. This session will include an overview of such a role, the emerging importance of this role as a key trustee responsibility, and the manner in which the board and the chief advancement officer interact around this increasingly critical role. Additionally, a panel of three trustees will offer their perspectives and comments on the best manner in which trustees and chief advancement officers may be effective in garnering philanthropic support, including expectations and responsibilities.

Michael P. Archibald, Vice President for Advancement, St. Lawrence University
Cynthia Woolbright, Principal, The Woolbright Group

Successful Development Work from a Regional or Home Office

Review the advantages and pitfalls of working for your institution from a regional location. Are you or your institution ready for this cultural transition? While technology can make this process almost seamless, there are many considerations, not the least of which is long distance relationships with colleagues and other institutional partners. This session will explore equipment and technical needs, relationship issues, efficiency, accountability, reporting, and work vs. life balance issues of working regionally…both pro and con.

Molly Butzer, Senior Regional Director, Leadership Gifts, Bucknell University
Building Management Skills for a Career in Advancement

**GRAND SALON X**

This program is targeted to new and mid-level alumni professionals who are working to build the leadership and management skills they will need to boost their careers and become more productive advancement leaders. The program will explore career trends that will impact advancement within the next 10 years and identify leadership techniques that will allow attendees to grow within their current organization or prepare to take the "next step" in their careers. Attendees will develop their footprint in advancement, learn to overcome the barriers to career success; discover the keys to career advancement in the current market; share tips for success with others; and learn how to build leadership prowess.

**Kathy Bickel**, Vice President, Ohio State University Alumni Association

### COM 1:30 PM – 2:45 PM

**E-xpress Yourself: New Media and Strategic Choices for Taking Institutional Marketing to the Next Level**

**ESSEX A**

From social networking sites, user-generated mediums, and entire virtual worlds, we are confronted with insurmountable opportunities to reach and learn from our customers. This session focuses on maximizing the impact of your institution’s (dwindling?) resources and maintaining your own authenticity to who you are. Attendees will learn who the “new influencers” are, how to spot and stay on top of the micro trends that drive today’s marketplace, leverage the idea of non-linear marketing, and how leading institutions are evolving their brands into “participatory brands” that maximize the return on investments.

**Ineke Caycedo**, Educational Marketing Group

**Kelly Chezum**, Clarkson University

### COM 1:30 PM – 2:45 PM

**You Can’t Manage What You Can’t Measure: How to Measure Your Marketing ROI**

**ESSEX B**

Higher education marketers are feeling intense pressure from Presidents and Boards to provide data on the return of their marketing effort. While the request for ROI information is reasonable, gathering it can be difficult. It’s important to know what you can measure and what you can’t. It’s also important to recognize the opportunities and challenges related to ROI measurement. Brush up on your high school algebra, because in this session, we will discuss the nuts-and-bolts of marketing ROI. We’ll cover why it’s so important, who to involve, and how to do it effectively.

**Terry Flannery**, Executive Director, University Communications and Marketing, American University

**Elizabeth Scarborough**, Chief Executive Officer and Founding Partner, SimpsonScarborough

### COM 1:30 PM – 2:45 PM

**Connecting the Google to the Greatest Generation: One University’s Approach to Historical Celebration**

**ESSEX**

With traditional and non-traditional approaches to the celebration of its history, Rutgers University in Newark has been able to reach constituents from the Google (its current students) to the Greatest (its oldest alumni) generation. The university’s 2008 centennial year celebrations, and its award-winning film, “The Once and Future Newark,” have resulted in a establishing a distinctive identity for Rutgers in Newark, raising its profile with media, public and private sector VIPs, alumni, donors, and other stakeholders.

**Helen S. Paxton**, Director of Communications, Rutgers University

### DEV 1:30 PM – 2:45 PM

**Starbucks, Home or Office: A Multidisciplinary Approach to Obtaining That Elusive First Visit**

**BRISTOL**

This session will help provide you with insight and practical tools derived from proven research techniques and more than seventeen years of multi-disciplinary sales experience to help you answer the following questions: Where should I focus my local or regional efforts? Who should be my first visit? Given our limited and possibly declining resources, how many visits can I realistically schedule each day? How do I get past the spouse, the administrative assistant, or secretary? How do you make sure when I finally do speak to an alumnus/na, that I have the best opportunity to secure a visit? How do I find the correct contact information when it is not listed in their records? What are the best free websites and paid services to use to find current contact information? Should I use ‘snail’ mail, the phone, or e-mail? Where is the best place to meet?

**Michael Andrulis**, Director of Development, Drexel University

**Shelley Kardon**, Director, Development Research, Drexel University

### DEV 1:30 PM – 2:45 PM

**Data Mining and the Annual Fund**

**GRAND SALON I**

Over the last decade predictive modeling has really started to take hold in the advancement community. More recently we have seen specific interest from annual funds and alumni associations. These organizations have used predictive models to allocate resources more efficiently.

**Peter Wylie**, Senior Consultant, Data Description, Inc.

**Heather Greig**, Manager of Annual Fund Programs, Georgetown University

**John Sammis**, President, Data Description, Inc.
1:30 PM–2:45 PM Sessions

<b>DEV</b> 1:30 PM–2:45 PM

<b>Gift Planning Front and Center: Positioning Gift Planning to Maximize all Philanthropy</b>

CHASSEUR

Despite the well understood value of gift planning as a component of strong development programs, most institutions continue to consider that function narrowly—equating planned giving exclusively with bequests and deferred giving. A broadened view of planned giving as a strategy to enhance all giving—both current and long term—will maximize philanthropy and help non-profit organizations and donors achieve their most ambitious objectives. This session will address obstacles and strategies to overcome them in order to position planned giving most prominently and effectively.

Michael J. Degenhart, CFRE, Director of the Office of Gift Planning, Pennsylvania State University

<b>DEV</b> 1:30 PM–2:45 PM

<b>Navigating Your Development Career</b>

GRAND SALON II

Are you eager to climb the development career ladder? Whether you are an established gift officer, or new to the field of development, this session will give you fresh ideas for navigating the next course in your development career. Attend this session to hear from development directors and gift officers about their path to success. Each presenter will share information about their unique career path and provide tips to help you thrive in the fundraising profession!

Shabina Bahl, Director of Development, James Buchanan Brady Urological Institute, Johns Hopkins Medicine

Michael Hibler, Senior Associate Director, Sidney Kimmel Cancer Center, Johns Hopkins Medicine

Lisa Seischab, Regional Director of Major Gifts, University of Rochester

Gail L. Freeman, Founder and President, Freeman Philanthropic Services, LLC (FPS)

<b>ALU</b> 3:15 PM–4:30 PM

<b>Going Green: What Alumni Relations Can Do to Help Save the Planet</b>

GRAND SALON IX

By reducing waste, utilizing environmentally friendly products, programming with faculty, and participating in wider campus sustainability efforts, alumni relations can not only make a positive environmental impact, but we can also be budget conscious and harness an opportunity to engage some of our constituents who want to be affiliated with a place that’s being socially responsible. We’ll explore this topic by exchanging ideas and asking questions as we all think about changes we can make in our current and future outreach.

Anne Delauney, Senior Assistant Director, Alumni Affairs & College Events, Skidmore College

Megan Mercier, Associate Director, Alumni Affairs & College Events, Skidmore College
ALU 3:15 PM – 4:30 PM
Alumni Relations and the Economy
GRAND SALON X
Our alumni, and our staffs, have felt the impact of the current economic crisis. How has the economy directly impacted your work? What steps have your team taken to help alumni? What can we do going forward? This will be an interactive discussion and brainstorming session.

Amy Layman, Senior Associate Director of Alumni Relations, Villanova University
Michael P. Saraka, Director of Alumni Relations, Slippery Rock University

COM 3:15 PM – 4:30 PM
Yin and Yang of Digital Photography Management
ESSEX C
With tens of thousands of digital photographs being added to image libraries annually, how do you find the one you need when you need it? Managing unwieldy amounts of image assets presents unique challenges and requires solutions designed specifically to streamline the acquisition, storage, and retrieval of digital media. Join Matthew Lester, professional photographer, and Jasmine Bucher, assistant director of college relations for print and web at Lebanon Valley College, to hear their systems for managing growing image collections.

Lester and Bucher will share the strengths, pitfalls, and tips to cataloging their extensive libraries and help you survive the love-hate relationship with digital asset management software.

Jasmine Bucher, Assistant Director of College Relations for Print and Web, Lebanon Valley College
Matthew Lester, Principal, Matthew Lester Photography

DEV 3:15 PM – 4:30 PM
Practical Advice for Helping a Donor Make a Larger Gift Than They Thought Possible
GRAND SALON I
A conversational knowledge of the gift planning tools that are available to donors and their financial or legal advisors can pave the way for more significant gifts. This session will use case studies to review—in layman’s language—the various gift planning opportunities available to donors and some of the keys to recognizing the appropriate situations in which those vehicles can be utilized.

Michael J. Degenhart, CFRE, Director of the Office of Gift Planning, Pennsylvania State University
3:15 PM–4:30 PM SESSIONS

DEV  3:15 PM–4:30 PM
Your Fundraising Software: Should I Stay or Should I Go?
CHASSEUR
Every organization faces this dilemma at some point: should we invest more in making our current donor system work for us, or is it time to move on? In a case-study review and discussion format, we will review a systematic process for making the best decision for your organization. Learn the warning signs of a system in trouble. Learn the step-by-step process to evaluate your current system, including common pitfalls to avoid and how to go about choosing a new system. Review case studies at two different institutions, with two different outcomes.
Shanna Adler, Director of Advancement Services, Lebanon Valley College
Ellen Rohwer, CFRE, is Director for Jacobson Consulting Applications, Inc.

DEV  3:15 PM–4:30 PM
Moving your Organization toward Donor Centricity
GRAND SALON IV
In order to unlock the true philanthropic potential of our alumni, parents, and friends, we should try to establish a campus-wide, donor-centric culture that focuses efforts on building long-term, mutually beneficial relationships with those who can do the most for our institutions. By becoming great listeners, we can tailor our efforts to each donor’s unique interests and passions in order to fully engage them and maximize their giving. This presentation will focus on the ways you can make donor centricticy a core institutional value and help your organization create more compelling giving opportunities that speak to your donors’ hopes, dreams, and passions.
Jim Thompson, Senior Vice President and Chief Advancement Officer, University of Rochester

DEV  3:15 PM–4:30 PM
The Formula for Hiring the Right Team
GRAND SALON IV
Faced with the challenge of increasing our staff from 37 to 51 people at Gettysburg College, we realized that we had to have an effective process in place to conduct multiple searches while continuing to meet fundraising goals. Therefore, we streamlined our hiring practices from A–Z to attract the best candidates for our team. In our session, we will present a detailed timeline and checklist that you can adapt to your institution and discuss ways to attract a diverse candidate pool. We recognize that the interview process is a two-way street and that many candidates have multiple options, so we will share how you can strive to make your organization the most attractive match. On the heels of over 100 interviews, we will reflect on many successes as well as share tips to avoid pitfalls along the way. We will also discuss effective roles different members of your organization can play in the process.
Ashlyn W. Sowell, Associate Vice President for Development, Gettysburg College
Susan E. Pyron, Executive Director for Special Projects, Gettysburg College

CAO  3:15 PM–4:30 PM
Talent Management
GRAND SALON VII

Accolades and Awards Gala
6:00 PM  Cocktails
7:00 PM  Dinner
HARBOURSIDE BALLROOM A–C
Conference attendee fee $80
Conference non-attendee fee $130
Black tie optional
Join us for this year’s Gala as we recognize individuals and institutions. Awards will celebrate outstanding individual contributions to the advancement of education through volunteer leadership and professional achievement, as well as outstanding achievement in communications and marketing.
Separate registration is required for this event. If you did not pre-register, a limited number of tickets will be available for sale at Registration until Monday at 4:00 PM
Awards Gala Sponsors:
PW Feats
Event Production Services
Honor Craft Incorporated
Gala Awards
IEP–Innovative Event Production
Audio Visual Services
GCF Marketing and Communication for Education
Gala Program Design

18  » CASE DISTRICT II  BALTIMORE
Tuesday, March 24

9:00 AM–10:15 AM SESSIONS

ALU 9:00 AM–10:15 AM
How to Choose an Affinity Partner
GranD SAlON VIII

The success of your affinity programs depends upon many things, including your choice of partners. Leave this session with a framework for making a responsible choice that’s in the best interest of your institution and your alumni.

Mark Clapper, Associate Director of Alumni Relations, Elizabethtown College
Jeff Roedel, Chief Operating Officer, USI Affinity Collegiate Insurance Resources

ALU 9:00 AM–10:15 AM
Building a Parent Relations Program: Reflections in the Third Year
GranD IX

A second subtitle for this session might be: “What Worked and What Didn’t.” From presenting opportunities to our new parents on Opening Day to offering on- and off-campus events to making the most of parent volunteers to overseeing our Parents Advisory Board, the presenter will share her experiences as the administrator in charge of creating a parent relations program at Gettysburg College.

Allison Singley, Ph.D., Associate Director of Alumni and Parent Relations, Gettysburg College

ALU 9:00 AM–10:15 AM
Programs and Considerations for a Graying Population
GranD X

As baby boomers turn 60, is your alumni relations program adapting? Are you making a special effort to reach out to this important group? Young alumni clubs have always been popular, but what about alumni at the other end of the spectrum? Bring your programming and communication ideas and join in the discussion of efforts to engage alumni in the growing, graying demographic.

Charles Bass, Associate Director of Alumni Relations, Villanova University

COM 9:00 AM–10:15 AM
What Can Higher Education Learn from Barack Obama?
EsseX A

The country just experienced what some would say was a transformational election. What can higher education learn from the way Barack Obama communicated in both a traditional print and web medium but also how he used social media and web 2.0 tools to carry his message and engage supporters? In an era where budgets are being tightened and organizations are being asked to be more efficient, how can your institution use some of these tools to accomplish your goals and communicate your messages?

Paul Redfern, Director of Web Communications and Electronic Media, Gettysburg College
Liz Rotter, Principal & Creative Director, studio-e

COM 9:00 AM–10:15 AM
Demographic & Economic Realities: Working Smarter for Every Admission/Retention
EsseX B

In an era of declining population and resources and increasing electronic communications, every institution is being called into new ways of marketing their mission. The purpose of this presentation is three-fold: to recognize regional demographics and economic realities; to approach Admission/Retention from a position of Appreciative Inquiry; and to outline specific, anecdotal experiences, i.e. Initiation of an SJA Parent Ambassador Program among others, and their results.

Elizabeth Legenhausen, Ed.D., Head, St. James Academy
move how stewardship can be used to 
relationships with your best donors. Come find out you are already doing and strengthen your rela-
session to explore how to rev up the stewardship 
Join us for this practical, hands-on, interactive 

three things are true:

1. Leadersh ip and major donors 

2. Stewardship is the 

3. Economic difficulties.

a tool that provides for a strategic and planned 
investment for a successful future even during 
economic difficulties.

Dr. Michael G. Gibbs, Vice President for 
Advancement, Capitol College
Mary Ann Stanton, Senior Regional Director, 
Leadership Gifts, Bucknell University

Creating WOW! Experiences for 
Leadership and Major Donors 

Stewardship is the second most important 
engagement opportunity you can offer your 
donors. In today’s philanthropic marketplace, 
three things are true:

- Next year’s results will be won through unwav- 
ering focus on donor retention;
- Accountability is the watchword; and
- Fresh, creative, unexpected stewardship in-
creases motivation and giving.

Join us for this practical, hands-on, interactive 
session to explore how to rev up the stewardship 
you are already doing and strengthen your rela-
tionships with your best donors. Come find out 
how stewardship can be used to move givers of 
small gifts to make bigger gifts — and inspire major 
gift donors to consider the ultimate investment.

Beth Herman, Vice President for College 
Advancement, Washington College
Laura Goodwin, Vice President, 
The Osborne Group

Navigating Foundations at a Large 
Institution 

The Smithsonian Institution’s Office of Founda-
tion Relations will outline for session attendees 
the complexities of foundation relations within 
a large, multifaceted institution. Likewise, we 
will discuss the challenges large educational/
cultural institutions, in particular, have making 
the case for funding in the face of foundation 
trends focused on measurable social impact and 
quantifiable outcomes.

Karen E. Avery, Director of Foundation Rela-
tions, Smithsonian Institution Office of External 
Affairs and Development
Rebecca Pfordresher, Assistant Director of 
Foundation Relations, Smithsonian Institution 
Office of External Affairs and Development

Loyal Giving Societies: Education, 
Recognition and Retention 

Donor participation is one of the most crucial 
aspects of a successful annual giving program. 
To achieve high participation rates, we rely on 
loyal alumni and friends who make a gift at any 
level every fiscal year. In response to this need, 
many institutions are now looking toward loyal 
donor societies to recognize these donors, but 
whose gifts do not qualify for leadership giving 
societies. We will discuss how to launch a loyal 
donor society; determining how to properly 
recognize members; and cost-effective ways of 
providing benefits to a society with thousands of 
members.

Jean Findlay, Director of Marketing and Donor 
Participation, The Penn Fund, University of 
Pennsylvania
Kelly Graf, Associate Director of 
Communications, The Penn Fund, University 
of Pennsylvania
Making the Most of Prospecting Travel and Volunteer Management with New Technologies

GRAND SALON IV

Boosting efficiency for gift officers and volunteer managers is both a noble and attainable pursuit. Traveling is expensive and can cost your institution hundreds of dollars just to get you to walk through a prospect’s door. Improving prospect visit opportunities with tools of the trade that include smart phones, core databases, free internet services, e-mail, videoconferencing, and other electronic media, will be broken into 4 parts: planning, scheduling, traveling, and follow up. Volunteer management topics will include ways to use new technology to improve event planning, sending newsletters, or for making targeted annual fund solicitations.

Josh Fredley, Regional Director of Development for Major Gifts and Regional Programs, University of Rochester
Sabra Aaron, Senior Director of Web Strategy and Management, University of Rochester Office of Advancement Services

Meet the Veeps

GRAND SALON VI

“Meet the Veeps” is a lively panel discussion that will focus on the opportunities and the challenges in advancement in today’s economic environment. The diverse panel representing large, small, public, and private institutions will discuss the influence of the economic downturn on their donors, their alumni, their students, faculty, and staff, and share some insight in turning challenging times into opportunity. Session attendees will also have an opportunity to ask questions of the panel in an open question and answer segment.

Facilitator: John Lippincott, President, CASE
Panelists:
Kelly Gagan, Vice President for Advancement, Institutional Advancement, Nazareth College
Fritz Schroeder, Sr. Associate Vice President for Development, Johns Hopkins University
Bob Sullivan, Vice President for University Development, The Catholic University of America
Rosemary Thomas, Ed.D, Vice President, Salisbury University Advancement, Executive Director, Salisbury University Foundation

Volunteer Management and Recognition

GRAND SALON IX

For higher education professionals, the effective use of alumni volunteer support can be a very time consuming, frustrating process. Administered effectively, it can be source of additional help to meet already overburdened alumni staff resources. Effectively recognizing volunteers starts with the university professional knowing exactly what tasks volunteers are needed for and then matching them with volunteers’ needs, skills, and interests.

Matt Borowick, Associate Vice President, Alumni and Government Relations, Seton Hall University

Going Green: What Alumni Relations Can Do to Help Save the Planet

GRAND SALON X

Colleges and universities are living and learning communities which affords them a unique opportunity to be models of sustainability. As event and program coordinators, communicating with a large, educated audience, we have the opportunity to lead by example when it comes to promoting green habits and awareness. By reducing waste, utilizing environmentally friendly products, programming with faculty, and participating in wider campus sustainability efforts, alumni relations can not only make a positive environmental impact, but we can also be budget conscious and harness an opportunity to engage some of our constituents who want to be affiliated with a place that’s being socially responsible.

We’ll explore this topic by exchanging ideas and asking questions as we all think about changes we can make in our current and future outreach.

Megan Mercier, Associate Director, Alumni Affairs & College Events, Skidmore College
Anne Delauney, Senior Assistant Director, Alumni Affairs & College Events, Skidmore College

Brand Identity: What’s in a Brand?

ESSEX B

Words, art, color, motion, and emotion. What makes a logo memorable? What makes it a big yawn? This presentation begins the “Logo Game.” Participants form small teams and match visual expertise and memory to see how many marks they can identify in a few minutes. The game is fun and enlightening, and it unveils deeper issues of recognition and distinction. Many contemporary organizations employ visual language eloquently, others whimsically, several traditionally, and a few with not much attention at all.

Lauren Robinson-Brown, Assistant Vice President for Communications, Princeton University
Laurel Masten Cantor, Director of Publications and Creative Strategy, Princeton University
10:30 AM–12:00 PM SESSIONS

### Changing the Communications Culture

**ESSEX A**

How do you change communications priorities to keep pace with strategic goals? How do you be responsive to your markets, whether prospective students or prospective donors, and the ways they want to receive information? Both Ithaca College and Berry College changed the underlying structure of their communications programs to help them achieve other advancement goals. This panel will look at the process they used, challenges they faced, and rewards they reaped in the seven years since they began the process.

- **Patricia LePera**, Senior Vice President at Steege/Thomson Communications
- **Bettyann O’Neill**, Vice President for Institutional Advancement, Berry College
- **Thomas Torello**, Executive Director, Marketing Communications, Ithaca College

### Beyond the Launch: Maintaining Capital Campaign Momentum through Integrated Marketing Communications

**ESSEX C**

The capital campaign is named and launched, and 50 percent of your goal is (you hope) in the bank. Now what? With a long three, or five, or maybe more years ahead, how do you keep your messages and materials fresh? In this session, you’ll consider ways to stay true to your campaign’s themes while evolving the narrative in response to flagging momentum, the economic downturn, and that nagging sense that your audiences may have just stopped listening. In Colgate’s case, we might think of it this way: how to translate “Passion for the Climb” to “Passion for the Plateau.”

- **Barbara Brooks**, Director of Public Relations and Marketing, Colgate University

### Do Students Make the Best Fundraising Case?

**BRISTOL**

This session will offer ideas and share experiences in utilizing the student body to help in the many facets of fund raising. From campaigns, to alumni events, to athletic tailgates, there’s a golden opportunity to infuse students into the Advancement process. We will discuss how to identify and recruit students and how to train them to serve as good ambassadors for your University.

- **Jason Curtin**, Director of Alumni Relations and Annual Giving
- **Dr. Rosemary Thomas**, Vice President for University Advancement and Executive Director, Salisbury University Foundation
- **Amy Gilbert**, President of the Student Alumni Council, Salisbury University

### Data Mining and Predictive Modeling: How 10 Schools found Success with the Johns Hopkins Model

**CHASSEUR**

Learn how an advancement professional developed a predictive model that identified qualified prospects for major gifts and isolated the variables most closely related with giving. Hear how the model was adapted to nine other colleges and universities across the United States, in Canada, and in Europe, with universal success. Review the 10 steps used by these schools to create their predictive models, and see concrete examples of how the models have increased annual fund response rates, predicted major gift officer performance, and targeted those prospects most likely to make lead annual and major gifts.

- **Dan Luperchio**, Director of Campaign Administration, Johns Hopkins University’s Zanvyl Krieger School of Arts and Sciences

### Gift Planning Front and Center: Positioning Gift Planning to Maximize all Philanthropy

**GRAND SALON I**

A broadened view of planned giving as a strategy to enhance all giving—both current and long term—will maximize philanthropy and help non-profit organizations and donors achieve their most ambitious objectives. This session will address obstacles and strategies to overcome them in order to position planned giving most prominently and effectively.

- **Michael J. Degenhart**, CFRE, Director of the Office of Gift Planning, Pennsylvania State University

### Creating an Alumni Giving Plan that Works

**GRAND SALON II**

Create a master plan that encompasses strategy, segmentation, solicitation, evaluation and cultivation...all geared toward creating a unique relationship between you and your alumni. Learn how to: increase alumni participation, plan a solicitation strategy for the year based on your calendar, group prospects by their relationship to your institution, best solicit, when and how often, and set overall goals to measure success. Discover a very simple, but effective, way to put all of these elements together.

- **Kathleen E. Pavelka**, CFRE, President, Telecomp, Inc.
- **James Malezi**, Annual Fund Officer, Washington & Jefferson College
Aaron, Sabra
Sabra Aaron is the senior director of web strategy and management for the University of Rochester’s Office of Advancement Services. Her higher education experience includes stints with the University of Maryland, Johns Hopkins University, and the University of New Mexico. Aaron has trained principal investigators to use Federal electronic funding information and proposal preparation systems, testing and documenting custom fundraising database systems. She holds a bachelor’s degree in music history from the College of Wooster.

Acampora, Paul
Paul Acampora, director of development and scholarships at Northampton Community College, has been a development officer for higher education and nonprofit organizations for nearly twenty years including stints as executive director, major gift officer, annual fund director, and director of development. A graduate of the University of Notre Dame, Acampora is an experienced public speaker, writer and adjunct instructor for Moravian College in Bethlehem, PA.

Adler, Shanna
Shanna Adler is director of advancement services at Lebanon Valley College in Annville, PA, where she is responsible for the overall management of the Development Services operation, including gift processing and acknowledgement, systems and constituent database management, and data collection and analysis. She holds a BS in business administration from Bucknell University in Lewisburg, PA.

Andrulis, Michael
Michael Andrulis is Director of Development at Drexel University’s College of Arts and Sciences. His career includes serving as a senior loan officer in mortgage banking at Dean Witter Reynolds, a development officer and acting director of alumni relations at Saint Peter’s College, a director of annual giving at New Jersey City University, and director of development at Rutgers University, his alma mater.

Archibald, Michael P.
Michael P. Archibald has served as the vice president for advancement at St. Lawrence University since 2002. Previously, he directed the Annual Fund and the Major Gifts Program at St. Lawrence since 1991. He started his career in the Annual Fund at the University of Vermont. Michael has been in the advancement field for over twenty years.

Arms, Pamela Peters
Pamela Peters Arms is the associate treasurer of the University of Pennsylvania where she oversees the daily cash management operations and an annual operating budget of $4B. Prior to joining Penn in 2004 she spent more than 10 years in the commercial banking industry in Philadelphia, served on the faculty of West Chester University and was a commercial real estate appraiser. Arms holds an MBA in finance from Temple University, Philadelphia, PA, and a BS in real estate from The Pennsylvania State University.

Asch, Kim
Kim Asch is managing editor of The Hill, the magazine of McDaniel College, and she also collaborates with the communications and marketing team on admissions and development materials for print and the Web. A native of Maryland, Asch has worked on staff and as a freelance writer for various Web sites, newspapers, and college magazines, including The Washington Times, LifeMinders, The Burlington Free Press, St. Michael’s Magazine, and Middlebury Magazine.

Avery, Karen E.
Karen E. Avery is the director of foundation relations of the Smithsonian Institution Office of External Affairs and Development. In this role, she is responsible for the development and implementation of an Institution-wide plan for increasing support from the foundation community for Smithsonian priorities and programs. Avery received her BA from Harvard in psychology and social relations and her M.Ed. from the Harvard Graduate School of Education.

Bahl, Shabina
Shabina Bahl is director of development of the James Buchanan Brady Urological Institute of Johns Hopkins Medicine. She manages a team of gift officers, and works directly with surgeons and patients to solicit gifts for programs and capital projects.

Balthaser, Robert
Robert Balthaser is the director of the Campaign for Scholarships at the University of Maryland, College Park. Balthaser has worked at the American Foundation for Aids Research (amfAR), Columbia University, New York University Child Study Center, Manhattan College and Pace University. He earned his BA in English at Alvernia University and his MS in higher education strategic management at the University of Pennsylvania.

Barlok, Tracy
Tracy Barlok is the campaign director at Skidmore College. She began her career in alumni affairs at her alma mater, Colgate University, where she served as director of alumni affairs, director of special gift programs, and special assistant to the president. In her 11th year at Skidmore, she is currently directing the College’s $200M Creative Thought Bold Promise fundraising campaign. She serves on the CASE Board of Trustees and previously served as chair of CASE District II.

Bass, Charles
Charles Bass is associate director of alumni relations at Villanova University, responsible for alumni engagement through management of chapter programs, reunions, and special events. He has served as the director of alumni and parent relations at The University of Tulsa and as the senior alumni relations officer at his alma mater, The University of Tulsa. Bass is a co-founder of PCUAD, an association of private college and university alumni directors.

Berry, Anne
Anne M. Berry is the vice president for advancement at Lebanon Valley College in Annville, PA. She began her career at her alma mater, Franklin & Marshall College, with the annual fund and has also served as director of development and alumni relations at Tulane University’s A. B. Freeman School of Business, director of medical annual giving for the School of Medicine and the Hospital of the University of Pennsylvania, and vice president for institutional advancement at Saint Michael’s College in Vermont. Berry is chair of the CASE District II Board. She received the CASE Steuben Apple Award for teaching excellence in 1997.

Bickel, Kathy
Kathy Bickel, vice president of The Ohio State University Alumni Association, earned a bachelor’s in business administration and a master’s in labor and human resource management from The Ohio State University. She joined the University in 1987 as assistant registrar and came to the Alumni Association 10 years ago. Bickel is currently a National CASE trustee representing the CASE V District.

Bollag, Flavio
Flavio Bollag, director of development programs and planning at Adelphi University, oversees all annual giving operations, including direct mail, phonathon, e-solicitation, corporate and foundation relations, development communications, and special events. He joined Adelphi’s Office of Advancement in 2006.

Borowick, Matthew
Matthew Borowick is the associate vice president for alumni and government relations at Seton Hall University, where he earned a BA and MBA. He worked for ten years in the banking industry and joined Seton Hall in 1999 and established the University’s first-ever Department of Government Relations. In 2004, Borowick was also given responsibility for the university’s Alumni Relations program.

Breckles, Brian
Brian Breckles is the director of alumni relations at Wilfrid Laurier University, where he earned degrees in physical education, business administration,
and an MBA. He has also worked in development, marketing, and athletics. He accepted the Canadian Council for the Advancement of Education (CCAE) Prix d’Excellence Gold Award for Best Alumni Program and Best Alumni Event.

Brooks, Barbara
Barbara Brooks, director of public relations and marketing at Colgate University in Hamilton, NY, transitioned to higher education after 15 years as a publicist and communications strategist. Before joining Colgate, she spent seven years as director of marketing and communications at Manhattanville College in Purchase, NY. She holds a BS in journalism from Northwestern University, and an MFA in creative writing from Bennington College.

Brown Jr., W.E. (Terry)
W.E. (Terry) Brown Jr., is the executive director of planned giving at the University of Pittsburgh. He also directed planned-giving efforts for the Western PA Region of the American Heart Association and was a gift planning consultant for PNC Advisors. He has a BS from Indiana University of Pennsylvania, has done graduate work at Carnegie Mellon University, and is currently completing a MPPM program at the University of Pittsburgh.

Bruhn, Tobias
Tobias Bruhn is the executive director of the Bucks County Community College Foundation and its Alumni Association. With a master’s degree in public relations, Bruhn started his fundraising career at Bucks as the special events coordinator before taking charge of the Foundation and Alumni Association in 2005. Previously, he was public information officer for Germany’s Department of Defense.

Bucher, Jasmine
Jasmine Bucher is Lebanon Valley College’s assistant director of college relations for print and web. In addition, she serves as an adjunct instructor of English for LVC, teaching English Communications to first-year and continuing education students.

Butzer, Molly
Molly Butzer is senior regional director of leadership gifts at Bucknell University, her alma mater. She also worked in corporate sales at Harris Publishing and Balfour. She was the first of eight leadership gift officers hired in the past three years to work regionally. Butzer has maintained a full time career from a regionally based home office for the past 18 years.

Cantor, Laurel Masten
Laurel Masten Cantor is director of publications and creative strategy at Princeton University, where she leads a team of editors, designers, and photographers who work on everything from course catalogs to gold watches, books and brochures to silk banners for the space shuttle, and University graphic identity systems. She has enjoyed such work for nearly 30 years, having become addicted to it at Wesleyan University.

Carroll, Lynn
Lynn Carroll works in the Classes and Reunions program of the University of Pennsylvania’s Alumni Relations office. She has also worked with volunteers at The Nature Conservancy and has led training workshops for the Association of Fundraising Professionals, The Nature Conservancy’s Volunteer Management Conference, and the Pennsylvania Land Conservation Conference. Carroll has a bachelor’s degree from the University of Pennsylvania and is working toward a master’s degree in organizational dynamics.

Carroll, Sandra Sarno
Sandra Sarno Carroll is the executive director of alumni relations (also the Alumni Association’s Board of Directors) at Wilkes University where she has developed innovative programs and events for students, alumni, and parents. She has also worked at Alfred University, Alfred State College, Hartwick College, Drew University, and The College of New Jersey.

Caycedo, Ineke
Ineke Caycedo is senior brand strategist of Educational Marketing Group, Inc. She has also served as communications director for The Women’s Foundation of Colorado, communications manager at Richfield Hospitality Services, Inc. and a media specialist for the University of Denver. She has been named a CASE “Stellar Speaker.”

Chezum, Kelly
Kelly Chezum leads Clarkson University’s marketing and external relations team and was also Clarkson’s director of corporate and foundation relations. Her career includes marketing positions at Aramark Campus Services, Lexington Housing Authority and F&W Publications.

Chick, Penelope
Penelope Chick is a major gifts officer at Cornell University. She previously served as the director of the Ithaca Fund at Ithaca College. Prior to her career in fundraising, she enjoyed diverse careers in counseling, marketing and health care administration.

Clapper, Mark
Mark Clapper is the associate director of alumni relations at Elizabethtown College where he has also worked in the Office of Admissions including serving as associate director of admissions. Clapper is an executive committee member of the National Educational Alumni Trust (NEAT). He has a BA in English from Elizabethtown College and a MA in leadership from Duquesne University.

Cohen, Lieba J.
Leiba J. Cohen is the director of institutional advancement at Hagerstown Community College (HCC), where she established the development office, and also serves as the executive director of the HCC Foundation. Cohen has a BA in liberal arts from the State University of New York at Albany, and an MBA from Frostburg State University.

Collins, Wendell
Wendell Collins is the director of corporate relations for Princeton University’s Bendheim Center for Finance. Also at Princeton, she worked in the Office of the Dean for Research and served as director of development communications. Before joining Princeton she worked in marketing and corporate communications management at Merrill Lynch, Dow Jones, and The Associated Press. She received a BA in journalism and political science from the University of North Carolina, Chapel Hill.

Coolman, Jason
Jason Coolman is acting associate vice president of development and alumni affairs at the University of Waterloo, where he has also been residence life coordinator, development officer, annual fund and development officer and director of alumni affairs. He was Residence Manager at the University of Guelph and as MPP Liaison for the minister of citizenship, culture and recreation, and is a graduate of Brock University.

Cooper, Cynthia
Cynthia Cooper is Assistant to the President for College, Community and Government Relations at Monroe Community College, where she oversees institutional image, community relations, media relations, institutional publications, government relations and crisis communications. Previously, at Keuka College, she served as Director of Public Relations.

Consoli, John
John Consoli is creative director of university magazines and director of photography at the University of Maryland. Twice named CASE National Photographer of the Year, Consoli also runs Image Impact Design & Photography, Inc. He has a BA in studio art and a BS in advertising design from the University of Maryland.
Cullen, Chris

Chris Cullen is chief marketing officer for the Johns Hopkins Institutions. His previous portfolios included Choice Hotels International, Alamo Car Rental and the Maryland State Tobacco Cessation Initiative. Cullen also hails from a military background, serving as a naval aviator and a public affairs officer from 1980 to 1987.

Curtin, Jason

Jason Curtin is the advisor to the Student Alumni Council and Tau Kappa Epsilon fraternity at Salisbury University. He graduated from Salisbury with a BA in communications and earned a master’s in education from the University of South Carolina. He is a doctoral student in the Organization Leadership program at the University of Maryland Eastern Shore.

Degenhart, Michael J.

Michael J. Degenhart is the director of the Office of Gift Planning at the Pennsylvania State University. He has served as the assistant vice president for the Office of Gift Planning and Regional Development at Syracuse University and the associate director of the Office of Trust, Estates & Gift Planning at Cornell University, and also worked in investment banking. He graduated from the University of Wisconsin and holds an MBA from the University of Rochester’s Simon School of Business.

Delauney, Anne

Anne Delauney is the senior assistant director of Skidmore’s Office of Alumni Affairs and College Events and oversees Skidmore’s annual alumni Reunion Weekend, affinity reunions, events for Friends of Skidmore Athletics as well as working with the Alumni Board of Directors.

Dempsey, Paul

Paul Dempsey is director of electronic communication at Dickinson College. His background includes experience as an administrator in the areas of information technology and student records and registration, and he also spent time working in academic and legal libraries. He earned a BA in dramatic arts from George Washington University and an MA in English from Shippensburg University.

DiGuiseppe, Steven A.

Steven A. DiGuiseppe is executive director of alumni, special events and data management at Millersville University and has also served as their director of alumni services. He is also a major gifts officer and oversees the Pennsylvania State System of Higher Education Alumni and Friends Travel.

Dillard, Lynne

Lynne Dillard is Director of Alumni Affairs and Foundation Special Projects at Harrisburg Area Community College. Her responsibilities with Foundation Special Projects include directing The HACC Foundation’s Annual Pro-Am Golf Tournament, the annual scholarships and awards event, and coordinating special stewardship and recognition events.

Duncan, Mark

Mark Duncan is director of campaign giving for Millersville University of Pennsylvania and previously was executive director of Chesapeake Center in Maryland. He serves on the CASE District II Boards, the board of Lancaster County United Way and various other organizations. Duncan has a BA in speech communications from Rowan University and is pursuing an MA in Communication and Leadership Studies at Gonzaga University.

Edmiston, Dawn

Dr. Dawn Edmiston is assistant professor of management and marketing at Saint Vincent College and has served on the faculties of Howard University, Johns Hopkins University, Trinity College, University of Maryland University College and University of Pittsburgh at Johnstown. She has worked at IBM Business Consulting Services, PricewaterhouseCoopers Management Consulting Services, and Discovery Communications. She holds a Doctor of Management degree from University of Maryland University College, an MBA from Columbia University, and a BS in management from Rensselaer Polytechnic Institute.

Edris, Timothy

Timothy “Tim” Edris is a team and leadership development specialist at the Emerging Leaders Institute, a boutique organizational leadership firm. In addition to more creative means of teaching, he has taught in more traditional settings at the collegiate level and other adult environments for over 12 years. He has an MS in organizational leadership.

Eicher, Michael C.

Michael C. Eicher is vice president for development and alumni relations at Johns Hopkins University and previously served as the vice chancellor for external affairs at UCLA. He served in a variety of leadership positions during his 20 years at UCLA, having risen through the medicine fundraising ranks. Prior to his time there, he was a leader in the YMCA.

Eissner, Bonnie

Bonnie Eissner is the communications director at Adelphi University, where she manages media relations and internal and external communications, serves as executive editor of Adelphia University Magazine, and works with the advancement team on the campaign case statement and related communications. She previously managed media relations at Kaplan, Inc.

Eldridge, David

Dr. David Eldridge is director of annual giving at Westtown School. He founded the Student/Young Alumni Advancement and Admissions Internship and Philanthropy Club and teaches philanthropy and financial literacy from 7–12 grades. He has his PhD in social welfare.

Ellmore, Philip T.

Philip T. Ellmore, PhD, CFRE, is assistant vice president for development at Muhlenberg College. He has served as vice president for development at North Carolina Wesleyan College and president of the Palmer Theological Seminary Foundation and worked at Lafayette College, Presbyterian Homes, and the Kutztown University Foundation. Dr. Ellmore also serves as a senior associate with Farr Healey Consulting, LLC. He has been a member of the adjunct faculties of Eastern University and Palmer Theological Seminary.

Falco, Traci

Traci Falco is the former director of alumni relations at Muhlenberg College in Allentown, PA, where she was responsible for engagement in the life of the College for more than 20,000 alumni, students, parents, and friends. Falco holds bachelor’s degrees in psychology and elementary education from Muhlenberg.

Flannery, Terry

Terry Flannery is American University’s first executive director, university communications and marketing, and a member of the president’s cabinet. Before joining American, Flannery worked at the University of Maryland where she built the marketing and communications program as assistant vice president and also held positions in admissions, student affairs and as affiliate assistant professor in the College of Education. She serves as the chair of the CASE Institute for Integrated Marketing and Branding and holds a BA in English and a master’s and PhD in college student personnel administration from the University of Maryland.
**Forbush, Dan**
Dan Forbush is executive director of communications at Skidmore College. Assuming the role of “community manager,” he has launched “Skidmore Interactive” as a new home page for the college’s online communities, and created a graphic identity for the college in Facebook.

**Frazier, Matt**
Matt Frazier is the founder and CEO of Pursuant, a full-service fundraising agency serving over 140 nonprofit, University and alumni based organizations. He is an online fund raising futurist, development strategist and frequent speaker on issues related to tomorrow’s donor.

**Fritze, Barbara**
Barbara Fritze is vice president of enrollment and educational services at Gettysburg College. She previously served as vice president for enrollment management and dean of admissions and financial aid at Goucher College and was dean for admissions at Drexel University. A graduate of Arcadia University, she received her master’s degree from Drexel University and is a graduate of the Harvard Institute in Educational Management.

**Fredley, Josh**
Josh Fredley is the regional director of development for major gifts and regional programs for the University of Rochester. He began his career in higher education advancement in the class campaigns office at Brown University. Fredley has a BS in communications from Cornell University and an MBA from the University of Rhode Island.

**Fulwider, Erik**
Erik Fulwider is director of alumni relations and annual giving at the University of Maryland School of Law, where he manages the law school’s alumni events, volunteers, annual fund strategies and stewardship. At Johns Hopkins University, where he earned an MBA, he managed the call center and then ran the booster club for the athletic department. He is a graduate of Washington State University.

**Gagan, Kelly**
Kelly Gagan is vice president for institutional advancement at Nazareth College in Rochester, NY. She previously worked as senior associate director of major gifts for The Carter Center in Atlanta, GA, and prior to that had a long career in health care fundraising. She is a graduate of Le Moyne College in Syracuse, NY.

**Gentile, Patricia**
Patricia Gentile is dean of continuing education and resource development at Atlantic Cape Community College and has been an affiliate faculty member at Regis University. She has a BA from the University of Pennsylvania and an MBA in finance and public policy and management from The Wharton School. Gentile is completing her doctorate at University of Nebraska-Lincoln in education leadership and higher education.

**Gibbs, Michael G.**
Dr. Michael G. Gibbs is the vice president for advancement and assistant professor at Capitol College in Laurel, MD, and previously served as the chief advancement officer for the Astronomical Society of the Pacific located in San Francisco, CA.

**Gilbert, Amy**
Amy Gilbert is a sophomore at Salisbury University and is the president of the Student Alumni Council, which was recognized as the most outstanding new student organization in 2007–2008. A second-year phonathon caller, Gilbert has represented Salisbury at multiple programs and events. She is also active in the campus Relay for Life program.

**Givens, Maxine**
Maxine Givens is director of finance and administration for the Fund for Johns Hopkins Medicine and has also served as senior accountant, manager of general accounting, financial and administrative system specialist, and a Hopkins One finance team leader. Before joining Johns Hopkins, she was a supervising senior auditor with KPMG Peat Marwick.

**Goodwin, Laura**
Laura Goodwin is vice president of The Osborne Group, where she works with clients in all nonprofit sectors to provide face-to-face, online and phone conference training. She has also served as the director of annual giving and director of donor relations and campaign communications at Sarah Lawrence College.

**Fulwider, Erin**
Erin Fulwider is director of alumni relations and annual giving at the University of Maryland School of Law, where she manages the law school’s alumni events, volunteers, annual fund strategies and stewardship. At Johns Hopkins University, where she earned an MBA, she managed the call center and then ran the booster club for the athletic department. He is a graduate of Washington State University.

**Gibbs, Michael G.**
Dr. Michael G. Gibbs is the vice president for advancement and assistant professor at Capitol College in Laurel, MD, and previously served as the chief advancement officer for the Astronomical Society of the Pacific located in San Francisco, CA.

**Gilbert, Amy**
Amy Gilbert is a sophomore at Salisbury University and is the president of the Student Alumni Council, which was recognized as the most outstanding new student organization in 2007–2008. A second-year phonathon caller, Gilbert has represented Salisbury at multiple programs and events. She is also active in the campus Relay for Life program.

**Givens, Maxine**
Maxine Givens is director of finance and administration for the Fund for Johns Hopkins Medicine and has also served as senior accountant, manager of general accounting, financial and administrative system specialist, and a Hopkins One finance team leader. Before joining Johns Hopkins, she was a supervising senior auditor with KPMG Peat Marwick.

**Goodwin, Laura**
Laura Goodwin is vice president of The Osborne Group, where she works with clients in all nonprofit sectors to provide face-to-face, online and phone conference training. She has also served as the director of annual giving and director of donor relations and campaign communications at Sarah Lawrence College.

**Graf, Kelly**
Kelly Graf is the associate director of communications for The Penn Fund at the University of Pennsylvania and also held positions at Temple University and Drexel University. Graf earned a bachelor’s degree in media studies from Fordham University and is currently pursuing a certificate in business essentials at The Wharton School.

**Gray, Sandra**
Sandra Gray is executive director of alumni relations at Johns Hopkins University. She has also worked in diverse roles in the Johns Hopkins Office of Alumni Relations and served as the director of student financial services at Johns Hopkins. She is a 1976 graduate of Johns Hopkins.

**Greig, Heather**
Heather Greig is the manager of annual fund programs at Georgetown University. Greig is particularly interested in the concept of data-driven decision making in advancement and how predictive modeling can increase return-on-investment for mail campaigns and the phone center. She is a graduate of the University of Florida.

**Gribbin, Meagan**
Meagan Gribbin is a senior at Slippery Rock University majoring in public relations and serves as president of the Green & White Society, Slippery Rock University’s student ambassador program.

**Haag, Matthew**
Matthew Haag is senior director of major gifts and regional programs at the University of Rochester. His career has included work in annual, corporate, foundation and major giving at Muhlenberg and Gettysburg Colleges, The Nature Conservancy, and Johns Hopkins University. He graduated from Gettysburg College with a BA in history and classical studies.

**Hanrahan, Thomas**
Tom Hanrahan is director of college relations at Lebanon Valley College and is the editor of The Valley alumni magazine. He has also served as LVC’s director of sports information and athletic development. He worked in media relations for a professional soccer team and interned in the communications...
office of the Hershey Bears, a minor league hockey team. Hanrahan has two degrees from East Stroudsburg University and earned his doctoral degree in higher education administration with a minor in sport history from the Pennsylvania State University, University Park.

**Hargett, Thadd**

Thadd Hargett is the director of annual giving for The Association of Former Students (Texas A&M University Alumni), and attributes his success to a targeted, concerted and creative effort in utilizing the online channel to acquire lost alumni, build affinity and adding younger donors to the donor cycle.

**Hasseltine, Don**

Don Hasseltine is the vice president for development at Dickinson College and was vice president of advancement at Colby-Sawyer College. Hasseltine was the director of the annual fund at Georgetown University as well as director of the university’s athletic fundraising organization, Hoyas Unlimited.

**Hayashida, Peter A.**

Peter A. Hayashida is the assistant vice chancellor/executive director of advancement services/UCLA Foundation. He has been the assistant vice chancellor of UCLA External Affairs since 2000. Prior to his current role, Hayashida held two positions with the UCLA Alumni Association; first as a director of the Association’s scholarship program and later as the associate executive director for finance and administration.

**Hayward, Jayanne**

Jayanne Hayward coordinates all aspects of Lebanon Valley College’s alumni programs and events. Previously serving as an assistant director of alumni programs, and with experience in admissions, she serves as a member of the College’s senior advancement team.

**Healy, Steven**

Steven Healy is director of public safety at Princeton University and is the immediate past president of the International Association of Campus Law Enforcement Administrators. He has testified about campus security issues before the U.S. Senate Committee on Homeland Security and Governmental Affairs and before the U.S. House of Representatives. Prior to Princeton, Healy was the chief of police at Wellesley College and director of operations at the Department of Public Safety at Syracuse University. Healy is a graduate of the United States Air Force Academy and spent 10 years on active duty with the United States Air Force as a security police officer.

**Herman, Beth**

Beth Herman is vice president for advancement at Washington College. She also has served as VP for advancement at Franklin & Marshall College, associate VP at the University of Puget Sound in Tacoma, Washington, director of development for the University of Washington’s College of Forest Resources, the director of annual giving at the University of Redlands, and communications/annual fund director at Charles Wright Academy.

**Hibler, Michael**

Michael Hibler is senior associate director, leading development activities at the Sidney Kimmel Cancer Center at Johns Hopkins Hospital for hematologic malignancies, prostate cancer, palliative care, residential living, and patient and family services. Additionally, he serves as the administrative director of patient and family services and administrator of the Center for Cancer Pain Research.

**Hill, Ashley**

Ashley Hill is a graduate student in the Post Secondary Education program at Salisbury University, has been a student employee for the Alumni Relations and Annual Giving Office and now works as a graduate assistant with the office. A founding member of the Student Alumni Council, she earned a BA in communications from Salisbury.

**Hill-Callahan, Patricia**

Patricia “Patty” Hill-Callahan is the associate vice president of principal gifts at Johns Hopkins Institutions, having returned to Johns Hopkins after serving Brigham and Women’s Hospital in Boston as the senior director of major and leadership giving, associate chief development officer, and most recently, interim chief development officer. She served as associate director, donor relations and development services, as well as director of development, Heart and Vascular Institute for the Fund for Johns Hopkins Medicine.

**Hoffman, Michael**

Michael Hoffman is the associate director of development and alumni relations in the Regional and International Programs office at Johns Hopkins University. Hoffman represents all undergraduate and graduate divisions of the university, as well as Johns Hopkins Medicine. Michael worked with co-presenter Greg Naleski at Georgetown Preparatory School, serving as the director of alumni relations.

**Ierardi, Lynn Malzone**

Lynn Malzone Ierardi is director of gift planning for the University of Pennsylvania. She held gift planning positions in health and higher education, served as vice president with the Merrill Lynch Center for Philanthropy and practiced estate planning and real estate law. Ierardi holds a JD from Fordham University School of Law and a BA from Lycoming College.

**Infantino, Richard**

Richard Infantino is a third-year alumni intern at Westtown School, where he began his internship as a senior during the inaugural program charged with developing young alumni connections. He is an economics major with an emphasis in business management at Occidental College.

**Jones, Blanton**

Blanton Jones is Director of Athletic Development at Georgetown University. He also has served as the president of WBJ Consulting, the Executive Director of the National Commodity Club of Vanderbilt University, the Assistant Director of the Virginia Student Aid Foundation (VSAF) at the University of Virginia and the Director of Annual Giving for Athletics at Virginia Commonwealth University. He holds a BA in English from the University of Virginia and an MBA from Vanderbilt.

**Kardon, Shelley**

Shelley Kardon is director of the development research department at Drexel University in the Office of Institutional Advancement. Previously, she worked for a medical membership organization, an online publishing firm and was a purchasing agent. She holds a master’s degree in library science from Drexel University, a master’s degree from the University of Pennsylvania in liberal arts, and a bachelor’s degree from Drexel University in human behavior and development/education.

**Katz, Stephanie**

Stephanie Katz joined the University of Rochester in December 2006 as senior director of the George Eastman Circle to oversee this new University-wide leadership annual giving society. Previously, she held various positions in alumni affairs and development at Harvard for 10 years.

**Kender, Joseph**

Joseph Kender is vice president for advancement at Lehigh University, where he also served as the assistant director for corporate and foundation relations. He was annual fund director and the associate vice president for development at Georgetown University and vice president for development at Saint Joseph’s University in Philadelphia.
Kovaleski, Brad

Brad Kovaleski is the director for student involvement and leadership at Slippery Rock University, where he received a bachelor’s degree in Spanish and a master’s degree in student affairs. Kovaleski also worked at Franklin & Marshall College as the assistant director of student activities.

Lambert, Valerie

Valerie Lambert is the assistant director of development at the Johns Hopkins Center for Talented Youth, principally in charge of CTY’s annual giving. Lambert has been involved with her local AFP chapter for a few years as the Annual Giving Roundtable coordinator and recently joined the state AFP board as coordinator of all of the Roundtables.

Langley, James

James Langley is the vice president for advancement at Georgetown University. He has also held the post of vice chancellor for external relations at the University of California, San Diego, president of the UCSD Foundation, and vice president for external affairs at Georgia Institute of Technology.

Lauer, Bonnie

Bonnie Lauer is director of alumni relations at Luzerne County Community College where she has also worked on the development staff. She is an active board member of Association of Fundraising Professionals—Northeast PA Chapter and also has been on the PA Community College planning committee for the past three years. She is also a member of the Council for Resource Development (CRD). Lauer holds an AAS degree from Luzerne, a BS in business administration from Shippensburg University and a master’s degree from College Misericordia.

Layman, Amy

Amy Layman is Senior Associate Director of Alumni Relations at Villanova University and also serves in a leadership role in the absence of the associate vice president. A graduate of Gettysburg College, Layman joined the alumni office staff in January 1997 after serving as assistant director of alumni relations at her alma mater Layman earned a master of public administration from Villanova in 2005.

Legenhausen, Elizabeth

Elizabeth Lengenhausen, EdD, is the head of St. James Academy (SJA) in Monkton, MD. A 27-year veteran of small school leadership, she is a former president of the Elementary School Heads Association, a member of the Mid-Atlantic Episcopal Schools Association Board and the Association of Independent Schools Evaluation Committee. She obtained her EdD from The Johns Hopkins University.

LePera, Patricia

Patricia LePera is senior vice president at Steege/Thomson Communications, brings over 25 years of experience in nonprofit management, marketing, communications, and development communications to her clients. LePera holds an undergraduate degree in journalism from Temple University and a master of science from Drexel University.

Lester, Matthew

Matthew Lester, principal of Matthew Lester Photography, is a visual storyteller whose photography has taken him from Afghan mountain villages and rural Haiti to universities and hospitals across the nation. He has a passion for lifelong learning and enjoys photographing the classrooms, research, and culture of college campuses.

Lippincott, John

In 2004, John Lippincott became president of the Council for Advancement and Support of Education (CASE). He joined the CASE staff in 1999 as vice president for communications and marketing. Prior to his arrival at CASE, Lippincott served for 12 years as associate vice chancellor for advancement at the University System of Maryland. Lippincott has also held public relations posts at Ithaca College in New York and at the National Endowment for the Humanities in Washington, DC. He began his career teaching humanities courses at community colleges in Connecticut, New York, and Oregon. Both his bachelor’s and master’s degrees are from Wesleyan University in Connecticut. Lippincott currently serves on the board of the American Council on Education, the major coordinating body for U.S. higher education.

Linton, Jennifer

Jennifer Linton oversees operations and logistics for the University of Rochester’s annual Mellora Weekend, including recruitment, scheduling, and training of several hundred staff and student volunteers, online and in-person registration, and budget management for the event. Linton is a graduate of the University of Rochester with a bachelor’s degree in psychology.

Luperchio, Dan

Dan Luperchio is the director of campaign administration at the Johns Hopkins University’s Zanvyl Krieger School of Arts and Sciences. After a national search, Luperchio was selected as the inaugural recipient of the Peter B. Wykle CASE Data Mining Internship for summer, 2008.

Malezi, James

James Malezi is the Annual Fund officer at Washington & Jefferson College in Western Pennsylvania. He administered the membership program at the Museum of the City of New York and managed the annual fund at New York-Presbyterian Hospital/ Columbia University Medical Center. Malezi earned his master’s degree in nonprofit management from the Robert J. Milano Graduate School of Management and Urban Policy at New School University.

McGann, Kara

Kara McGann is the assistant director of alumni relations at Wagner College. She graduated from Wagner in 2007 with a degree in arts administration.

McKee, Madison

Madison McKee a first year intern at the Westtown School charged with stewardship projects for top annual fund donors, and will take a leadership role for a project that matches new students with current student partners to facilitate first year transition.

McPherson, Richard

Richard McPherson is president and creative director of McPherson Associates, Inc. He represents nonprofit organizations including PBS and NPR stations, higher education institutions, conservation organizations, and women’s health and advocacy groups and advises international NGOs. He is a faculty member of New York University’s Heyman Center for Philanthropy and Fundraising and is the author of Digital Giving: How Technology is Changing Charity (2007, iUniverse, A Barnes & Noble Company).

Meehan, Melissa

Melissa Meehan is the director for Web administration at Buffalo State, the State University of New York system’s largest college. Prior to joining Buffalo State, she worked in corporate communications at Minitab, Inc. and Northrop Grumman-Amherst Systems, Inc. She holds a master’s in communication from the State University of New York at Buffalo and BA from the Pennsylvania State University.

Mercier, Megan

Megan Mercier has been a member of the advancement staff at Skidmore College for seven years, serving first in the annual fund office and then the Office of Alumni Affairs & College Events.

Morton, Rachel

Rachel Morton is the former director of publications at Middlebury College and editor of the award-winning Middlebury Magazine. Over a 25-year career in higher education, she has edited magazines for Middlebury College, the University of Massachusetts, and Washington University in St. Louis. Morton is a former trustee of CASE and a member of its Commission on Communications.
Moser, Diane
Diane Moser is the director of Adelphi University’s university promotion and outreach. She has served as the deputy director of admissions and was responsible for recruitment events, community outreach initiatives, and admissions marketing strategies. She holds a bachelor’s degree from Adelphi and a master’s degree from Pratt Institute.

Moyer, Kimberly Yost
Kimberly Yost. Moyer is the senior director of leadership giving at Moravian College. She was formerly at her alma mater, Philadelphia University, as the assistant vice president for development and alumni relations. Her international fundraising experience began while she was the director of major gifts at Muhlenberg College.

Moyer, Tilghman
Tilghman Moyer is assistant vice president of institutional advancement at Temple University. Prior to joining Temple University, he served at Muhlenberg College in a variety of roles, including director of annual giving, director of development services and the Muhlenberg Fund, and associate vice president for development and director of capital projects. He also served as associate director of annual giving at Gettysburg College. He received his BA from Penn State, and his MA in philanthropy and development from Saint Mary University of Minnesota.

Murray, David
David Murray is assistant dean for advancement at Syracuse University Library. He has been director of publications at Phi Kappa Psi fraternity headquarters, worked in development at PBS and NPR stations, and at a community foundation, and consulted with charities. He studied English and computer science at Bucknell University and holds an MA in philanthropic studies from the Indiana University Center on Philanthropy.

Naleski, Greg
Greg Naleski is the vice president for development at the NativityMiguel Network of Schools, which is responsible for funding programs, institutes, and conferences that provide professional development for board members, presidents, administrators, and faculty. He has also served as the executive director for institutional advancement at Georgetown Prep.

Olsen, Gary
Gary Olsen heads the alumni relations program at Villanova University and is a member of the CASE Commission on Alumni Relations. Olsen also serves as an alumni relations consultant to several institutions in the areas of board development, strategic planning, leadership development, and organizational change.

O’Neill, Bettyann
Bettyann O’Neill is the vice president for institutional advancement at Berry College, and also has served there as assistant dean and director of graduate studies in the college’s Campbell School of Business. O’Neill held senior management positions in HR, sales, operations, and product management in the oil, insurance, and financial services industries. She is a graduate of Rutgers College and earned her MBA from The Wharton School.

Pavelka, Kathleen E.
Kathleen E. Pavelka, CFRE, is president of Telecomp Inc. She is an active volunteer, having served on the Association of Fundraising Professionals (AFP) Board of Directors, the AFP Finance and Human Resources Committee and currently serves on the AFP PAC Board of Directors. She is a graduate of Monroe Community College.

Paxton, Helen S.
Helen S. Paxton is director of communications for Rutgers University in Newark. She is the author of Music’s Connecticut Yankee: An Introduction to the Music of Charles Ives (Atheneum), and co-author, with Arthur Paxton, of Making Music (Atheneum-Macmillan). A graduate of Oberlin College (BA) and Columbia University (MA), she worked in the classical music industry before coming to Rutgers.

Payne, Mariann
Marianne Payne is associate director of the Campaign for Scholarships at the University of Maryland, College Park. She taught high school English before joining the Folger Shakespeare Library in 1995 as program director for university programs. She earned her BA and MA in English at East Tennessee State University.

Pfordresher, Rebecca
Rebecca Pfordresher is the assistant director of foundation relations at the Smithsonian Institute. She was a development associate at NPR from 2003-2006. Pfordresher holds bachelor’s and master’s degrees from Georgetown University.

Phlegar, Charlie
Charlie Phlegar is the vice president for alumni affairs and development at Cornell University. Before Cornell, he worked at Johns Hopkins University as the interim vice president as well as the associate, and later senior associate, vice president for development and alumni relation. He has also been vice president for development at the University of South Carolina, as associate vice chancellor and campaign director at East Carolina University, and as assistant director of the Virginia Tech Alumni Association.

Pyron, Susan E.
Susan E. Pyron is executive director for special projects at Gettysburg College, her alma mater. She was the executive director of the Commission on the Future, a project that engaged nearly 400 alumni, parents, and friends in a year-long study that formed the foundation of the Gettysburg College’s $100M campaign. Subsequently, Pyron served as the director of annual giving.

Rawak, Chrissi
Chrissi Rawak is assistant vice president for talent management and finance at the University of Michigan, and has also served there as assistant vice president of development, talent management and finance, the executive director of development, recruitment and personnel, and as the assistant women’s swimming coach. She also was director of personnel and business resources at Northwestern University.

Redfern, Paul
Paul Redfern is director of Web communications and electronic media at Gettysburg College and has served there as assistant director of admissions, coordinator of electronic media and assistant basketball coach. Redfern graduated with a bachelor’s degree in political science from Gettysburg College.

Robinson, Cynthia Hartman
Cynthia Hartman Robinson is director of alumni relations at Delaware County Community College. Robinson’s responsibilities include management of and training for the alumni database.

Robinson-Brown, Lauren
Lauren Robinson-Brown is assistant vice president for communications at Princeton University. A journalist who wrote for the Newark Star-Ledger, Dallas Times-Herald, Boston Globe and periodicals such as Black Enterprise magazine, she also served as New Jersey’s assistant secretary of state. She holds a Master of Science degree from the Columbia School of Journalism and an undergraduate degree in English from Princeton.

Roedel, Jeff
Jeff Roedel is chief operating officer of USI Affinity Collegiate Insurance Resources. Prior to USI he worked for 10 years in alumni relations at The Ohio State University and the University of Colorado at Boulder. He has a bachelor’s and master’s degree from The Ohio State University.
Rohwer, Ellen
Ellen Rohwer, CFRE, is director for Jacobson Consulting Applications, Inc., a technology and operations consulting firm devoted to serving nonprofits. She has also served as development officer with Catholic Healthcare West and with HealthSystem Minnesota. Rohwer earned a BA from Marquette University and MA from University of California Santa Barbara.

Romano, Linda
Linda Romano is senior associate director of the Office of Promotion and Outreach at Adelphi University, having joined the university as a copywriter for promotion and outreach. Romano is a Fellow in the Institute for Educational Leadership’s Education Policy Fellowship Program. Romano has a bachelor’s degree from Dartmouth College and a master’s degree from Adelphi University.

Rotter, Liz
Liz Rotter is principal and founder of studio-e, where she provides strategic consulting and creative services that assist educational institutions in achieving their marketing goals. Throughout her 20-year career in design, her work has been recognized for excellence by the American Institute of Graphic Arts and Council for Advancement and Support of Education. Rotter has a BA in design from the Art Institute of Boston at Lesley University.

Sammis, John
John Sammis is the president of Data Description, Inc, a company that specializes in data analysis software and services. He holds a BS in chemical engineering from Clarkson University and an MBA from Cornell University. He has extensive experience in building predictive models.

Saraka, Michael P.
Michael P. Saraka is the alumni director at Slippery Rock University and worked at Bloomsburg University as a residence director and at St. Francis University as the director of career services. He also has served in the PA Army National Guard as an armor platoon leader and human resources specialist. He received a bachelor’s degree in communications from Clarion University and a master’s degree in student personnel from SRU.

Satterthwaite, Ray
Ray Satterthwaite founded Engagement Analysis Inc., which focuses on the measurement and benchmarking of the levels of engagement of alumni populations. He has served as director of the alumni association and director of annual giving at McGill University and director of major gifts, campaign manager, associate vice principal of advancement, and chief development officer at Queen’s University. He is the past president of the Canadian Council for the Advancement of Education (CCAE) and has a BA in psychology from McGill.

Scarborough, Elizabeth
Elizabeth Scarborough is CEO and one of the founding partners of Simpson Scarborough. Her experience in conducting market research and providing strategic solutions to colleges and universities also includes founding the marketing research division for Carnegie Communications. She is chair of the American Marketing Association Symposium for the Marketing of Higher Education and holds a BS in mathematics from James Madison University and an MBA from Fordham University.

Schmall, Alethea
Alethea Schmall is the assistant director of alumni relations and annual giving with the University of Maryland School of Social Work, where she earned an MSW. She received her BA from Dickinson College, a master’s in Judaic studies from Baltimore Hebrew University, and a certificate from the Baltimore Institute for Jewish communal service.

Schoedler, Fritz
Fritz Schoedler is senior associate vice president at Johns Hopkins University, where he has been for 14 years, beginning as the director of annual giving, then serving for 5 years as the executive director of the Alumni Association before moving into his current role. Prior to Hopkins, he worked in annual giving and corporate relations at the University of Maryland, College Park.

Seischab, Lisa
Lisa Seischab is a regional director of major gifts for the University of Rochester. Specializing in major gift fundraising, Seischab has worked for the Baltimore Symphony Orchestra, University of Maryland, and Johns Hopkins Medicine, prior to her current role at the University of Rochester.

Siler, Julie
Julie Siler is the director of alumni relations and annual fund at Shepherd University and also served as director of development and alumni relations at St. Maria Goretti in Hagerstown, MD. She has served on CASE District II conference committees for the past three years and is this year’s conference chair. Siler received her bachelor’s degree in anthropology and master’s in education from George Mason University.

Singley, Alison
Allison Singley is associate director of alumni and parent relations at Gettysburg College. She also taught college English for fifteen years and has worked in academic computing at Trinity College and served as interim managing editor at The Gettysburg Review. She has BA in English from the University of Pennsylvania and both her MA and PhD in English from the University of Connecticut.

Smith, Jerry
Jerry Smith is president and CEO of the J.F. Smith Group, a fundraising consulting firm. Since then, he has helped over 125 clients raise more than $1 billion in their capital campaigns.

Snevel, Todd
Todd Snevel oversees reunion giving programs, parent outreach, faculty/staff campaigns, and special projects within LVC’s Development Office. His background also includes assisting community agencies with campaign development and strategic planning.

Sowell, Ashlyn W.
Ashlyn W. Sowell is associate vice president for development at Gettysburg College. She has been director of development for The Children’s House at Johns Hopkins and The Grant-A-Wish Foundation (now known as Believe in Tomorrow) in Baltimore, MD, was annual fund director at Duke University’s Fuqua School of Business and a major gift officer at the Medical Center. Sowell graduated from Duke with a BA in psychology and completed a M.Ed. from UNC-Chapel Hill in special education.

Sowers, Dave
Dave Sowers is Director of Major Gifts at Franklin & Marshall College. Prior to his work at F&M, he worked at Johns Hopkins University in major gifts, annual giving and alumni relations. Sowers is the CASE District II treasurer and holds a BA from Gettysburg College and a MS in counseling from McDaniel College.

Stanton, Mary Ann Sigler
Mary Ann Sigler Stanton is the associate director of development for 25th and 50th reunions and the senior regional director of leadership gifts at Bucknell University. She previously served as the associate director of the Annual Fund at Skidmore College and as an assistant director of annual giving at Bucknell.

Starace, Melissa
Melissa Starace is the director of alumni affairs at Northampton Community College. Starace is also responsible for oversight of the College’s Alumni Association, which is one of the oldest, continuously active community college alumni associations in the nation.

Stover, Susan
Susan Stover is the senior vice president at Graham-Pelton, serving as leader of their Independent School Practice Group and a member of the senior management team. She has also served as director of ex-
ternal affairs at Gill St. Bernard’s School in Gladstone, NJ. She has served as a trustee of CASE District II and as chairperson of the District Board.

Sullivan, Robert M.
Robert M. Sullivan is the vice president for university development at The Catholic University of America. He has also served as vice president for institutional advancement at Saint Joseph’s College and Annual Fund director, assistant to the president and director of development at Saint Anselm College. He serves on CASE’s Commission on Philanthropy and also on the Board of Trustees of CASE District II. Sullivan received a bachelor’s degree in English literature from Saint Anselm and a master’s degree in education from Harvard University’s Graduate School of Education.

Swinton, Brent
Brent Swinton is senior director for advancement services at Howard University. He has also worked in various roles for the American Heart Association ranging from field operative in Georgia to executive youth market director in Florida. He also worked as a traveling consultant and trainer for Datatel, Inc. A graduate of the University of Georgia, Swinton also earned a master’s degree in public administration from the University of Central Florida.

Thomas, Rosemary
Rosemary Thomas, Ed.D., is Vice President for Institution Advancement and Executive Director for the Salisbury University Foundation. She previously served as associate vice president for advancement at Fairmont State College and vice president for advancement at Glenville State. She is a graduate of Clemson University and received her Master of Public Education from the University of South Carolina and her doctorate in educational leadership from West Virginia University.

Thompson, James D.
James D. Thompson is senior vice president and chief advancement officer at the University of Rochester. Prior to Rochester, he served at Washington University in St. Louis as associate vice chancellor and was the lead staff member for The Campaign for Washington University. Thompson has also served as a senior director of university development at Syracuse University and as executive director of institutional development and college relations at Lindenwood College, his alma mater.

Torello, Thomas
Thomas Torello is the executive director of marketing communications at Ithaca College. He has also served as director of marketing at Rensselaer Polytechnic Institute and worked in account management at several marketing firms in New York. Torello has a bachelor’s degree in communications from the Park School of Communications at Ithaca College.

Tosten, Rodney S.
Dr. Rodney S. Tosten is the vice president for information technology at Gettysburg College. He is a past chair of the Department of Computer Science and took a two year leave of absence from the college to work for a software startup company. He graduated from Gettysburg with a BA in mathematics, received his MS in computer science from West Virginia University and his PhD in information technology and engineering from George Mason University.

Traub, Alison
Alison Traub is the assistant vice president for development and the campaign director at the University of Virginia, where she has also served as the interim executive director of development for the College and Graduate School of Arts and Sciences. At Johns Hopkins University she was director of development for the Department of Urology at the school of medicine, and major gifts officer for both the Krieger School of Arts and Sciences and the Whiting School of Engineering.

Weekly, Kevin
Kevin Weekly is Director of Major Gifts and Regional Programs at the University of Rochester. At Johns Hopkins University he was a major gifts officer for its Office of Regional and International Programs and School of Engineering. Kevin began his development career in the gift planning office at Virginia Tech, his alma mater. He earned his juris doctorate from the University of Virginia’s School of Law and is a member of the Virginia State Bar.

Wehle, Becky
Becky Wehle is senior director of donor relations at the University of Rochester. She oversees the organization and coordination of more than 40 events annually including the president and key donors, including groundbreaking, dedications, regional presidential events, professorship installations, and donor cultivation and stewardship events.

Wellbaum, Rob
Rob Wellbaum is the senior director of development for the Samuel Ginn College of Engineering at Auburn University. Prior to his service at Auburn, Wellbaum served three years as the director of corporate development for Scottish Rite Children’s Medical Center Foundation, now Children’s Healthcare of Atlanta, GA.

Wesley, Kevin
Kevin Wesley is Executive Director of Alumni Relations at the University of Rochester. He also has worked in alumni relations leadership roles at Bowdoin College and Carnegie Mellon. He is a member of the CASE Commission on Alumni Relations and co-founded the North East Alumni Relations (NEAR) consortium. Wesley is a graduate of Bowdoin College with a bachelor’s degree in music and economics.

Widenhorn, Mirko
Mirko Widenhorn is director of alumni relations at Wilkes University where he is primarily responsible for the online community, The Colonel Connection. He started his career in higher education administration at his undergraduate alma mater, Drew University. After attaining his master’s degree from the College of Europe in Brugge, Belgium, he worked there in marketing, communications, and student affairs.

Wilson, Amy
Amy Wilson is the director of annual giving at The Catholic University of America. She has also worked in development and communications at the Smithsonian Institution, the University of Notre Dame, McGill University, and the U.S. Conference of Catholic Bishops.

Woolbright, Cynthia
Cynthia Woolbright is principal for The Woolbright Group. She is a nationally known fundraising consultant and advisor with over 20 years as an advancement officer and as a vice president at Hollins University, Smith College, University of Rochester and University of Vermont.

Wylie, Peter
Peter Wylie is senior consultant at Data Description, Inc. He is the author of KeyDonors and the books Data Mining for Fundraisers and Baseball, Fundraising and the 80/20 Rule. He holds a PhD in industrial psychology and has been consulting with advancement professionals for more than twenty years.

Zimmerer, Glenn
Glenn Zimmerer is vice president, sales and marketing, for Harris Connect. He has also served as director, customer acquisition, and promotion, and director of business development with Priceline.com, and held several sales and marketing positions at Prodigy Services. He received his bachelor’s degree in business administration and marketing from William Paterson University and his master’s degree from Fairleigh Dickinson University.
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Northampton Community College

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Director of Campaign Giving
Millersville University

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Tilghman Moyer
Assistant Vice President, Development
Temple University

AT LARGE TRUSTEE

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Cynthia L. Cooper
Assistant to the President for College, Community and Government Relations
Monroe Community College

AT LARGE TRUSTEE

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Lori Eastman
Director of Development
Skidmore College

AT LARGE TRUSTEE

Wendell Collins
Director of Corporate Relations
Princeton University

AT LARGE TRUSTEE

Myra Garcia
Vice President for Institutional Advancement
Wagner College

AT LARGE TRUSTEE

WEBSITE STRATEGY & DEVELOPMENT

Melissa Meehan
Director, Web Administration
Buffalo State College

AT LARGE TRUSTEE

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Portledge School

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Jerold Wikoff
Gettysburg College
Agilon's vision is to be the best provider of information management products. Under the stewardship of RuffaloCODY, our products have been built on proven processes using leading edge technologies that will provide customers with powerful information automation tools for many years to come. We at Agilon are devoted to philanthropy and helping our customers fulfill their missions of achieving excellence in education, research, and service to their constituencies. The company’s name is derived from the Latin terms, “agilis” and “agitatio.” Bringing these two terms together formed Agilon—actively driving management of your fundraising processes and donor relationships. Agilon’s vision is to be the best provider of information technology systems and services for non-profit organizations. We will continue our product vision to lead the industry with innovation and application of internet-based network communications and sophisticated data processing technologies. Agilon’s easy to use software delivers accurate information on demand, whenever it’s needed, wherever it’s needed.

**Agilon**
Cedar Rapids, Iowa
**BOOTH C4**
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Amanda Miller, Marketing Manager
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F: (319) 739-0759
www.myagilon.com

Agilon’s fundraising software technologies originated over twenty years ago from the innovation and entrepreneurial spirit of Iowa State University and The University of Iowa. The company was created in 2005 as a spin-off of RuffaloCODY’s software division, and dedicated to marketing a third generation of fundraising and relationship management products. Under the stewardship of RuffaloCODY, our products have been built on proven processes using leading edge technologies that will provide customers with powerful information automation tools for many years to come. We at Agilon are devoted to philanthropy and helping our customers fulfill their missions of achieving excellence in education, research, and service to their constituencies. The company’s name is derived from the Latin terms, “agilis” and “agitatio.” Bringing these two terms together formed Agilon—actively driving management of your fundraising processes and donor relationships. Agilon’s vision is to be the best provider of information technology systems and services for non-profit organizations. We will continue our product vision to lead the industry with innovation and application of internet-based network communications and sophisticated data processing technologies. Agilon’s easy to use software delivers accurate information on demand, whenever it’s needed, wherever it’s needed.

**AmazingMail.com**
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We don’t believe one size fits all. AmazingMail is committed to providing a variety of solutions specifically tailored to your business needs. We’ve made available powerful direct marketing tools on our website 24/7—365 days a year, all from the convenience of your desktop anywhere in the world. Or take advantage of our knowledgeable Solutions Experts and their vertical industry marketing experience. They’re standing ready to assist you with advice and support or the complete conception, creation and execution of your entire direct marketing campaign. And we also provide enterprise-level solutions that automate and integrate seamlessly into your existing CRM solutions. You decide which is best for you...in any event you’ll receive the very best AmazingMail has to offer.

**The Angeletti Group, LLC**
New Vernon, New Jersey
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Lawrence Jerome, Senior Vice President
Jill Savage, Director, Community Building Partnerships
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We are a boutique firm harnessing a cadre of talented, goal-driven development professionals with current experience and proven track records—not only students of best practices but also architects of them.

We are a highly scalable model allowing us to deploy the right people for each assignment and tailor each project to the client’s individual needs.

We are committed to every organization’s individuality, while consistently applying the following common and critical components to each project—Strategy, Planning and Execution.

We are designed to partner with development programs to increase philanthropic support while decreasing costs.

**Azzam Jordan**
Towson, Maryland
**BOOTH C19**
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Jon Bandell, New Business
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We are designed to partner with development programs to increase philanthropic support while decreasing costs.

**Blackbaud**
Charleston, South Carolina
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Tauheedah Rashid, Event Marketer
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Your work is changing the world. Sometimes, when day-to-day challenges are all you can think about, it may be hard to remember that. But it’s true—because of what you do with your life and your time, the world is a better place.

At Blackbaud, we don’t think there’s anything more important than helping you do what you do even better, so we’ve devoted our lives to developing solutions that allow you to stretch your resources further. We’re not just a software vendor; we’re a partner who understands your challenges, shares your values, and does what it takes to help you succeed. Why? Because you deserve someone who’ll take care of you, too.

We’ve been working exclusively for nonprofits since 1981, which in software terms is ages ago (think black and green computer screens and DOS). While the majority of high-tech start-ups were dropping like flies, we survived and eventually thrived by really listening to our customers and only focusing on the nonprofit sector. Today, 27 years later, we’re still following that model for success.

In a nutshell, we’re the big public company with the small corner-store personality. We’re large enough to invest in the best people and technology, yet small enough to care about each customer. And we believe in open communication and sharing information, so you should find what you’re looking for on this website. If you don’t, give us a call—we’d love to hear all about you.
Comprehensive marketing and communications services for colleges and universities; strategic communications planning, consulting, research, creative services, and production. Assignments include: institutions in transition (e.g., moving to co-educational or university status); communications support for institutional branding programs; student recruitment; development campaigns; alumni and community relations; anniversary celebrations; and media marketing.

**Campbell & Company**
Washington, DC
**BOOTH T6**

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Britt Moses Rothrock, Associate Consultant
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Campbell & Company is a national firm offering counsel in advancement planning, fundraising, marketing communications and executive search. Through thirty-plus years and thousands of engagements, we have helped nonprofit organizations anticipate and manage the challenges of the philanthropic marketplace. With offices around the country, Campbell & Company brings you the benefits of local knowledge and understanding.

As Campbell & Company is 100 percent employee-owned, every member of our firm has a stake in your success and our track record shows it.

Customized, Flexible Services
Because unique circumstances accompany common problems, Campbell & Company tailors our service to fit your needs. We approach each engagement with a creative mindset, work hard to understand the issues beneath the surface and find the places where a fresh perspective, innovative ideas, additional in-depth experience or specialized skills can add the most value.

Full-Service Resource
Just as the whole is greater than the sum of its parts, Campbell & Company is more than a collection of individuals with specific skills. Working with us taps you into a rich knowledge base and collective wisdom, which adds meaning and value to every engagement. Each Campbell & Company consultant can call on a network of colleagues and strategic partners with specialized expertise in donor relations, annual giving, prospect management, planned giving or data mining, to name a few.

A Rewarding Partnership
At Campbell & Company, we view your completed capital campaign, strengthened endowment, thriving annual fund or successful executive placement as a beginning, not an end. The relationship that begins with a discrete assignment becomes a true partnership as together we appraise problems and seek organization-wide solutions.

**CCS Fundraising**
Towson, Maryland
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The Compass Group, Inc.
Aldie, Virginia
**BOOTH 98**

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Robert Bull, Senior Vice President
Katie Stratton, Vice President
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www.therightdirection.com

The Compass Group has the flexibility to meet your organization’s specific needs. With a foundation in our six core services, we create a tailor-made plan for every client.

Planning Studies
The timely, accurate and detailed feedback and recommendations you receive through a Compass planning study is all you need to make the best decisions about campaign strategy, timing and goals.

Campaign Management
Our work with you, your volunteers and staff to plan and implement a successful fundraising campaign guarantees over-the-goal success.
CONFERENCE EXHIBITORS

Council for Advancement and Support of Education (CASE)
Washington, DC
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Our Mission: CASE advances and supports educational institutions around the world by enhancing the effectiveness of the alumni relations, communications, marketing, fund raising, and other advancement professionals who serve them.
Our Vision: As the premier professional association for educational advancement professionals, CASE is committed to being the primary resource for professional development and information and the leading advocate for professional standards and ethics.
Our Values: CASE believes education improves lives and societies, and we value service to our members through professional excellence; respect for volunteers and staff as partners, stakeholders, and leaders; and commitment to integrity, ethical behavior, and inclusiveness.
Our Strategic Imperatives
I. Strengthen Member Services
II. Further the Profession
III. Establish Global Leadership
IV. Lead Change in Advancement

Creosote Affects
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Market Research
As part of our marketing methodology, research is a critical part of the development of successful communications. Our goal is always to build a thorough understanding of your message, your audience, and most importantly, you. Our research is always concluded with a written analysis of Creosote’s recommended positioning, branding and marketing strategies.

CRW Graphics
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Will Glassman, Vice President for Sales
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At CRW, we’re not just any Account Executives, Estimators, Customer Service Representatives, and Press Operators. We’re yours. And we’re dedicated to making your life easier for a long, long time.
As a woman-owned business, we’re especially sensitive to your needs. Not only do we listen, we offer insightful solutions, and provide state-of-the-art pre-press, high quality color printing, finishing, binding and fulfillment, and direct mail distribution and data management. Plus, we do it all with a personal touch.
With our full range of services all under one roof, and 24/7 staffing, we can see any project through from start to finish. In fact, that’s when we’re best able to give you greater value for every dollar, and the tightest quality control— every step of the way.

CUNA Mutual Group
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CUNA Mutual Group is a leading provider of financial services to cooperatives, credit unions, their members, and valued customers worldwide. With more than 70 years of experience, we are passionately committed to helping customers succeed. CUNA Mutual Group provides innovative commercial and consumer insurance and protection products to safeguard your assets and help find solutions for your financial needs. We offer services to grow long-term relationships and manage risk. Our asset management team brings capital-market expertise to benefit your investments. Our vision: to be a trusted business partner who delivers service excellence with customer-focused, best-in-class products and market-driven innovation.
As a nationwide provider of print and print-related services, we are here to streamline and handle all of your print procurement needs from start to finish—design to distribution—through our full-service digital print, commercial print, direct mail and marketing services capabilities. And that’s just scratching the surface.

Operationally, we manage six full-line print, fulfillment, warehouse and distribution centers from coast to coast.

**DCM**
Brooklyn, New York

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**Direct Development, Inc.**
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**Entertainment Cruises**
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**GEICO**
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**BOOTH C5**
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Garry Smalley, Partnership Marketing Manager
Samantha Abrams, Partnership Marketing Manager
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www.geico.com

The name goes back to GEICO’s first customers in 1936, who were government employees and military personnel. Founder Leo Goodwin went into business determined that he could deliver automobile insurance at reduced prices by selecting prime customer groups and marketing directly to them. Goodwin succeeded in driving down operating costs and passed on the savings to policyholders up front as discounts. GEICO continues to find ways to manage its business costs in order to offer savings to all drivers today.

**Customer Base**
- 8.5 million auto policyholders and growing
- GEICO insures more than 14.4 million vehicles
- Size and Scope
- GEICO is the third-largest private passenger auto insurer in the United States based on the latest 12 months written premium
- GEICO is the fastest-growing major auto insurer in the U.S., with policies-in-force growth of 8.8 percent in 2007
- 23,000 associates
- 12 major offices around the country
- Provides 24-hour service, 7 days a week, 365 days a year
- Four affiliated companies meet insurance needs of drivers

**Graham-Pelton Consulting, Inc.**
Summit, New Jersey

**BOOTH 300**
Susan Stover, Senior Vice President
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www.graham-pelton.com

Graham-Pelton Consulting’s professional staff has helped to set the standard throughout the industry for creative and effective ways to respond to the evolving challenges our clients face. We strive with each client to elevate our work to an art form, and our clients—universities, schools, religious institutions, hospitals, and community/social service organizations—clearly benefit.

Graham-Pelton is successful because our staff is committed to your success. We believe in our professional abilities; we enjoy the challenge each new client presents, and we celebrate with our clients when our combined efforts achieve our goals.

We know this business. Our staff offers decades of experience in every aspect of development, for every type of organization. We are seasoned professionals with excellent track records as on-site campaign directors and veteran consultants who have traveled nationally to serve diverse clients and causes.

**Grenzebach Glier and Associates**
Chicago, Illinois

**BOOTH C11**
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Ron Skupien, Solutions Consultant
T: (312) 372-4040
www.grenzglier.com

Mission: To create a sustainable culture of philanthropy by advancing best practices in client environments.

Vision: Nonprofit institutions inspire sustainable, extraordinary philanthropy to advance their missions.

**Harris Connect**
Brewster, New York

**BOOTH C15**
Glenn Zimmerer, Vice President, Sales
Tyler Carey, Director of Sales
Joe Cavanagh, Director of Regional Accounts
T: (800) 326-6600
F: (845) 940-0895
www.harrisconnect.com

Times have changed since Bernard C. Harris formed our company 40 years ago. But the importance of maintaining connections remains the same.

At Harris Connect, we’ve worked with hundreds of organizations, helping them gather and maintain the data they need to build, reinforce and maintain bonds among their alumni and members. Today, we’re the market leader in strategic affinity solutions—providing integrated data research, directory and Internet solutions to educational institutions and other organizations.

From colleges to clubs, high schools to associations, we’re dedicated to making sure our clients are well connected.
Honorcraft Incorporated
Stoughton, Massachusetts
BOOTH 100

Randy Smith, Vice President
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www.honorcraft.com

We have been working to fabricate the most creative recognition awards, and only recognition awards, for over four decades. We excel at this, mostly because we enjoy helping our clients achieve their goals. Our founder has always said that no one needs to buy awards or recognition walls from us; we have to prove, every time, that we will not fail them, either in the quality of our product or in the sincerity of our service. Our mission is to live by these words, every day.

In over four decades of working with our clients, we have come not only to understand and fulfill their professional requirements, but also to build strong personal relationships that have survived all kinds of business and personal changes.

We tell you this because it is indicative of the way we choose to do business. If we work well together, designing or ordering an award is a pleasure, not a chore, and it is certainly a great way to do business.

Our goal, each and every day, is to provide our clients with the highest quality recognition products, and the ultimate in customer service.

We continue toward that goal by attracting personnel who share our vision and by investing in technology that will guide us into the future.

Our team approach to sales, service and manufacturing will enable us to innovate in order to better serve our clients needs. That, in combination with integrity, will enable us to become an indispensable partner to our clients.

iModules
Overland Park, Kansas
BOOTH 205

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Katie Hudson, Territory Manager
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iModules Software builds hosted, web-based solutions enabling member-based organizations to manage and grow private online communities which build connections between its members. Our nearly 600 clients engage over fifteen million members in more than 5,000 hosted communities. An established leader since 1999, iModules further raises the standard with Encompass, our latest release, specifically designed to provide integrated management of online communities, their constituents’ data and a full-featured content management system.

Kreo, Inc.
Victor, New York
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Kreo, Inc. is a leading creative promotional products company specializing in merchandise that delivers maximum impact. Our in-house experts create unique items using materials from fabric and plastic, to metals and paper. From creative concept through fulfillment, Kreo has the resources, experience, and integrated approach needed to produce brand-enhancing promotions.

Kreo was founded with the premise to help leading companies design, create and promote their brands through the use of merchandise. No culture or company is alike and our 100% custom products cater to your initiatives.

Decades of experience and entrepreneurial spirit combined with our strategic partners, worldwide product sourcing and in-house design have paid off. Kreo is a leader in the promotional products industry.

Lambert & Associates
Havertown, Pennsylvania
BOOTH T4

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Connie McCloskey, Vice President
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www.lambertassoc.com

Lambert & Associates, Inc. is an executive search firm focused on serving the needs of the nonprofit sector. Founded in 1996 and headquartered outside Philadelphia, PA, we assist the leadership of client organizations in identifying, contacting, screening and hiring exceptional professionals in all specialties of nonprofit management, including fund raising, public communications, marketing and constituent relations. We serve clients throughout the United States. Each professional at Lambert & Associates has extensive experience in the nonprofit arena. This hands-on knowledge of the marketplace we serve is essential to the firm’s high quality service.

Leapfrog Advancement Services
Erdenheim, Pennsylvania
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Nancy McDonald, Principal
Lauren DePino, Marketing Manager
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F: (215) 545-4218
www.leapfrog-as.com

We founded Leapfrog Advancement Services because, in our more than 30 years of combined experience writing, designing, and producing communications for the non-profit sector, we found that neither freelancers nor traditional communications firms fit the needs of many mission-based organizations. Because the majority of non-profits have either a very small or virtually non-existent staff, they are often left with only three options for producing the communications that support their advancement efforts:

- Design, write, or manage (or all of the above) the projects themselves, which often requires more time and/or expertise than is available;
- Find and manage freelance writers and designers, which can be difficult and nearly as time-consuming as doing it themselves; or
- Hire a communications agency, which costs much more than they can or should spend and doesn’t provide much-needed understanding of mission-based organizations.

None of those options was ideal, so we created Leapfrog, an advancement services company specializing in producing communications that inform, cultivate, solicit, and steward.
Magic Hour Communications
Waltham, Massachusetts

Booth C18
Louis Gudema, President and Creative Director
Roz Landman, Project Manager
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F: (781) 647-1601
www.magic-hour.com

Magic Hour Communications helps schools, colleges, and corporations dramatically improve the effectiveness of their communications through the Web and other media. We provide an integrated branding and communications solution focused around our hosted Web design and development offering. Magic Hour's MagicWand™ Web content management software is especially powerful, flexible, and easy-to-use.

Magic Hour goes beyond the narrow focus of "design" firms, or "technology" firms, to provide a complete communications solution that includes award-winning design and technology. We begin by looking at your communications challenges from a higher point of view, create a detailed strategy for the media being employed, and only then turn to creating distinctive designs that reflect your organization's unique brand. We create in-depth Web strategies, compelling designs, program the Web site, train your staff, and provide ongoing hosting and support.

In a few cases—such as the creation of a new visual identity or admissions viewbook—our solution may be technology-free. In other cases, such as porting an existing Web site to our hosted MagicWand content management system, our solution may include technology-centered. But in every case, our real focus is on helping you solve your communication challenges.

Our services include:
• Branding
• Organization Logo/Identity Design
• Web Site strategy and design
• MagicWand™ hosted Web Content Management System
• Database Integration
• Interactive virtual tours and profiles
• Videos
• Print collateral and viewbook writing and design

Marsh Alumni
Park Ridge, Illinois

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www.marshpm.com

For nearly four decades, Marsh Alumni Services has been a premier provider of insurance products and services for alumni associations. We offer a full range of insurance products (life, health, long term care, auto/home, pet & travel).

Marts & Lundy
Lyndhurst, New Jersey

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www.martsandlundy.com

Philanthropy is an art, a science, a business and a spiritual undertaking all in one.

That’s what we at Marts & Lundy have practiced for more than three-quarters of a century. We believe in philanthropy’s power to transform and enhance not only the institutions with which we work but, more importantly, the world in which we live.

As a full-service consulting firm with an international client base, we have our fingers on the pulse of today’s nonprofits. We are a recognized leader in helping institutions of all sizes build a “culture of philanthropy.” Our mission is ambitious—to help our clients reach and sustain their philanthropic potential.

Please browse our website to learn more about our firm, our values, the clients we serve, our professional staff of senior consultants, and the services we provide. We invite you to become a registered user of our site to gain free access to research and reports, invitations to Marts & Lundy hosted events, our quarterly newsletter, Counsel, as well as our Annual Report on Philanthropy. If we can be of further assistance, or to have a Marts & Lundy consultant contact you directly go to the contact us page.

Meyer and Associates
Chatham, New Jersey

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Founded in 1973, Meyer and Associates designs, sells, and manages specialty insurance programs. Most programs are endorsed by collegiate alumni/ae associations exclusively for their members and families. While some products are available only through alumni/ae association sponsorship, others are available without such affiliation.

The founders of our company remain its managers:
• Edward C. Meyer, Jr., President
• Barbara G. Meyer, Vice President

Privacy: We don’t allow anyone else to have access to ANY information about you, except, of course, insurance companies and as may be required by law. That means you’ll never receive ANY mail, except through us, as a result of purchasing insurance from us. We will never sell your name to anyone. Please try us. We’re big enough to help you, and small enough to know you.

Mind Over Media
Pittsburgh, Pennsylvania

Booth C14
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Dana Maxson, Sales Representative
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www.momknows.com

Established: 1982

Business: Strategy and production services for the corporate sector
Specialty: Business to business and employee communications
Staff: 30 full time strategists; writers; brand specialists; producers; project managers; interactive architects; web developers; video editors; designers and client relation managers

Engagement: Completion of study; new analysis; determination of initiative; identification of need
Awards: ITVA, IABC, AMA, Telly, Emmy and CASE
Location: Warehouse district of Pittsburgh

Movad
Bensalem, Pennsylvania

**BOOTH 209**

Dennis McClaskey
T: (215) 638-2679
F: (215) 638-1720
www.movadcorp.com

Movad is the leading supplier of direct mailing services, offset and digital printing along the I-95 corridor from New York to Washington D.C. Movad enables clients to efficiently develop and execute highly customized direct mail campaigns resulting in not only high response but, cost effective strategies with impressively high ROI. The Movad model allows clients to focus on strategies while collaborating with designers, production efficiency experts and direct mail response consultants.

Since our opening in September of 1986, we have operated with the belief that a client is more important than an order. It is this philosophy that enabled us to serve over five hundred clients for more than ten years. Our relationship with our clients extends to our suppliers and team members. Many of them have been associated with this organization for over 15 years.

**Offset Impressions, Inc.**
Reading, Pennsylvania

**BOOTH C13**

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Jim Federico, Vice President
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www.offsetimpress.com

OI has unparalleled expertise in print, digital photography, finishing and customer service. Our operation includes prepress, sheetfed press and bindery departments on a three-shift schedule.

We work collaboratively with our customers through innovative solutions and personal communications. Doing this combines the knowledge, experience and vision of our people with the needs and concerns of our customers—fostering better quality results, faster.

Equipment list available on request.

**Paschal Murray Executive Search**

Indio, California

**BOOTH T2**

Colette Murray, CEO
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F: (760) 863-4513
www.paschalmurray.com

Paschal Murray, Inc. is a specialized executive search firm with corporate offices in Indio, California and regional offices in San Diego, Knoxville, Tennessee, Washington, D.C., Pinehurst, North Carolina, and Fort Myers, Florida. We assist management in identifying and hiring outstanding professionals in fundraising and public sector management positions. The firm has been in operation since 1978. Our clients are located throughout the United States, Canada, Europe, and Asia.

**PCI: the data company**

Dallas, Texas

**BOOTH 210**

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www.publishingconcepts.com

Who is PCI?
PCI creates and manages alumni web communities and publishes alumni directories for educational institutions. Our clients are more severely challenged to find ways to fund their missions than ever before. PCI’s products and services help them meet the challenge by driving alumni engagement and maximizing contributions through technology, expertise and best practices.

What does PCI offer?
PCI offers two types of customized products and expert services:
1. PCI publishes printed alumni directories
2. PCI offers SPARK®, featuring a combination of best-in-class online community software and online marketing/management services.

How long has PCI been in business?
PCI traces our roots back over 85 years to the Rockwell F. Clancy Company, the nation’s first publisher of alumni directories. We have been incorporated under the PCI (Publishing Concepts) name since 1982 and are a privately-held, family-run business.

What market(s) is PCI focused on?
PCI works with alumni and development offices of universities, colleges, professional schools, independent schools, alumni associations, fraternities and sororities.

Who are some of the PCI clients?
PCI partners with 17 of the top 25 universities as rated by US News and World Report including Princeton, Harvard and Georgetown.

Where is PCI located?
PCI is located in Dallas, TX.

**Peapod Design**

New Canaan, Connecticut

**BOOTH C3**

Jim Healey, Owner
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www.peapoddesign.com

Peapod Design has working relationships with several top-name colleges and secondary schools for whom we have produced viewbooks, brochures, annual reports, magazines, and Web sites that achieve results.

While our team of professionals adheres to expecting standards of creative design, administration, scheduling, and budgeting, we remain at heart a boutique operation. We are selective in our clientele and we work hard to maintain the highest level of excellence in both service and design quality.

We take pride in designing and creating: Alumni Magazines
Annual Reports
Brand Identity
Capital Campaigns
Case Statements
Invitations
Newsletters
Publications
Recruitment Brochures
Viewbooks
Websites
Today Penn State is one of four “state-related” universities (along with the University of Pittsburgh, Temple University, and Lincoln University), institutions that are not state-owned and -operated but that have the character of public universities and receive substantial state appropriations. With its administrative and research hub at the University Park campus, Penn State has 23 additional locations across Pennsylvania. While some of these locations, such as the Penn State Milton S. Hershey Medical Center, have specialized academic roles, they all adhere to a common overall mission and set of core values and strategic goals.

Peterson Ray & Company
Dallas, Texas

Kristi Cooper, Vice President for Business Development
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www.peterson.com

Founded in 1985 by Bryan L. Peterson, our firm now employs eight staff members; five designers, one web developer, one business developer and one administrative and business manager. Each designer is a gifted conceptualist, able to produce, develop, and execute unique ideas that effectively communicate your marketing or information-driven messages.

We are a full-service design studio that enthusiastically welcomes each opportunity to provide innovative solutions to today’s marketing and communication challenges. We combine a high degree of experience with a strong emphasis on client relationships.

Our diverse client base includes industries such as telecommunications, education, construction, health care, energy, food service, manufacturing, transportation, and the arts.

Peterson Ray & Company’s project capabilities include annual reports, publications, capability and marketing brochures, and identity systems. Additionally, Peterson Ray & Company has been designing multimedia interactive projects and web design since 1995.

PlannedLegacy
Winnipeg, Manitoba

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www.plannedlegacy.com

Interactive Multimedia is the new standard of excellence for dynamic donor recognition, capital campaign promotion, non-profit marketing and fundraising communication.

PlannedLegacy helps non-profit organizations stay at the fundraising forefront with innovative designs and intuitive technology that keeps current and prospective contributors involved, committed and in touch.

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PlannedLegacy’s substantial investment in research and development has produced a technology platform that blends video, text, graphics, photographs, animation, and audio into a single powerful medium—one that delivers features and benefits that were never before available—and certainly not from a static donor wall.

Our industry-leading use of advanced technologies coupled with our imaginative approach to donor wall design has made us a leader in recognition displays, enabling you to attract, excite, motivate and increase awareness as never before. Our design team considers the practical implications of environment, space, and fabrication, and blends colors, materials and finishes to create displays that highlight your brand, enhance your message, and tastefully and distinctively honor your contributors.

PlannedLegacy can handle every aspect of your recognition or interpretive project—from concept to design, from donor wall blueprints to full fabrication, from installation to ongoing support—our team becomes your team.

PlannedLegacy specializes in all aspects of interactive recognition and interpretive displays. Our experience and knowledge enables us to be effective partners for our clients, and this is reflected in the functional and flexible solutions we create.
There is a satisfaction that comes with client relationships and making a difference everyday. Pursuant engages and supports organizations that are making a difference everyday.

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Sarah Winkler, Account Manager
T: (410) 727-5575
F: (443) 451-8439
www.pwfeats.com
Since 1985, P.W. Feats’ integrated team of creative strategists and production professionals have been creating extraordinary experiences that deliver targeted results for higher-education institutions, including Johns Hopkins University, Cornell University, the University of Pennsylvania School of Medicine, the University of Connecticut, the University of Maryland, and St. Joseph’s University. A full-service event design and management company, P.W. Feats specializes in capital campaign celebrations, alumni events, commencement ceremonies, groundbreakings, and building dedications.

RuffaloCODY
Cedar Rapids, Iowa
Booth 202
Cynthia Brown, Vice President & Consultant, Strategic Fundraising Services
Jim Drawbridge, Vice President & Consultant, Strategic Fundraising
Jeanne Snyder, Vice President, Software Division
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RuffaloCODY is the recognized leader in providing strategic fundraising and enrollment management services. Fundraising services include: management of student phonathons, off-campus calling programs, CAMPUSCALL software for phonathons, phonathon training and consulting services and planned giving identification programs. Enrollment management services includes: search, qualification and a full complement of direct marketing services and tools. Delivering proven results since 1991, RuffaloCODY is one of America’s fastest growing private companies with more than 3,000 employees in 85 locations.

Our mission is to provide our clients with the highest quality marketing services and software products designed to meet their specific needs, while promoting a positive atmosphere for our employees.

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• History of developing long term client relationships and repeat business
• Company principals extensively experienced in all aspects of philanthropy and non-profit management

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• We help you discover what works and help maximize its impact.
• We listen; we understand; we care.
• We have a fail-safe approach* to capital campaigns.
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Our Philosophy Just as every school is unique in its educational philosophy, Silverpoint approaches every project as a unique puzzle to be solved. Silverpoint believes that, done properly, the school website is a transparent window that accurately displays the character of the school. We study all of the existing materials at the school, from the admissions viewbook to the letterhead to the kind of brick or stone used in campus structures to the soccer uniforms. We spend time on campus and conduct interviews with key members of the school community. We get to know you and the
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State College, Pennsylvania

**Booth C1**

Naketa Dobbins, Director of Business Development

Christopher Snavely, Account Manager

T: (814) 234-3672
F: (814) 234-3786

ww.snavelyassociates.com

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Snavely Associates is both responsive and experienced; we have spent over a quarter of a century gaining expertise and building a list of clients with whom we have had positive working relationships. We pride ourselves on putting into practice the power of collaboration. Together with our clients, we develop meaningful and effective print, interactive, and video solutions unique to each organization and specific to its needs.

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**SunGard Higher Education**
Malvern, Pennsylvania

**Booth 206**

T: (610) 578-5168
F: (610) 578-3368

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Like most of the institutions we serve, SunGard Higher Education has an official mission statement to guide our business: To promote individual achievement, enhance institutional performance, and foster education communities worldwide.

We fulfill this mission through the technologies and services we offer. Success comes when we help our higher education clients excel in the achievement of their institutional missions, which also operate at these different levels:

- At the individual level, we help institutions serve learners as they achieve their educational goals, and we help administrators, staff members, and other campus personnel excel at their responsibilities.
- At the institutional level, we provide a wide array of systems and services that help colleges and universities improve their accountability and effectiveness as organizations, employers, and places of learning.
- At the community level, our technologies support communication, collaboration, and other community needs. Our company’s active involvement in higher education professional associations, standards boards, and other organizations reflects our commitment to help sustain vibrant, education-focused communities throughout the world.

**Swim Design Consultants**
Kensington, Maryland

**Booth C6**

Laurie Swindull, Principal
Andrew Iskowitz, Principal

T: (301) 565-1627

www.swimdesign.com

What can we say that will make you want to find out more about Swim Design? Maybe that we’ve created exciting graphic solutions for many years. What if we told you we love what we do? Or, how about the fact that we treat each client and project, from Corporate Identity to Websites, as unique opportunities to learn something new and challenge our creativity?

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Since 1986, Telecomp has provided client-specific, telephone outreach programs for leading colleges, hospitals, and other nonprofit organizations—from Ivy League schools and regional, private colleges to leading hospitals and cultural institutions—generating millions in annual and capital campaign funds.

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