



**RNL ADVANCEMENT
INNOVATION**
VIRTUAL SUMMIT
SEPT. 17-18, 2020

Virtual Conference Agenda

Registration is FREE. There is no cost to attend the RNL Advancement Innovation Summit, but pre-registration is required at RuffaloNL.com/AIS.

To join the presentation in progress, consult your registration email sent each day or the [RNL Advancement Innovation Summit Event webpage](#). Find the latest updates, instant login, and day-of information viewing links at RuffaloNL.com/AIS.

Thursday, September 17

Morning consultation time with RNL consultants

10:00-10:15 a.m. CST

RNL Welcome from Dr. Sumit Nijhawan



Dr. Sumit Nijhawan—President and CEO, RNL

We can't be next to donors. Our budgets are tight. But our fundraising goals haven't decreased. Business as usual won't cut it this year. RNL's CEO kicks off our two-day event and shares why it's important for us to embrace innovation in this challenging time.

10:15-11:15 a.m. CST

Opening Conference Keynote: Six Questions to Challenge the Norm in Donor Engagement



Vu Le—Founder of NWB Consulting, NonProfit AF, and Co-Founder, Community-Centric Fundraising

One of his funders asked him to start a blog, and he ended up saying things that challenge the norm in fundraising. The provocative creator of Nonprofit AF joins us to answer six tough questions about donor engagement in this challenging time, and encourages us to think critically about how we work with donors—and each other. Vu's also the co-founder of Community-Centric Fundraising, and he'll share how this people of color-led movement seeks to channel philanthropy through inclusive and socially just practices.

11:15-11:30 a.m. CST

Break

11:30 a.m.-12:00 p.m. CST

Innovation in Action Case Study: The University at Buffalo



Geoff Bartlett—Assistant Vice President, Annual Giving, The University at Buffalo

The University at Buffalo has employed the newest donor engagement strategies, from actionable use of AI and prescriptive analytics, to remote and omnichannel engagement to help meet goals with high ROI. Geoff will share how it's worked, and what's next for transforming donor engagement.

12:05-1:15 p.m. CST

Advancement Leaders Panel: Beyond Business as Usual



Hosted by: Renée Vaillancourt, Executive Vice President of Client Success, RNL; and Sarah Kleeberger, Senior Vice President, Fundraising Consulting, RNL

Panelists:



Edward Chiu—Senior Vice President for Advancement, Babson College



O'Neil Outar—Vice President for Institutional Engagement, Rhode Island School of Design



Megan Morey—Vice President for College Relations, Williams College



Scott Roberts—CEO and President, University of Connecticut Foundation

Change is hard. How do we surprise and delight donors—and meet our goals in this difficult time? Join our panel of experts to hear how they are challenging the norm in donor engagement, and get tips on how you can lead change in fundraising.

1:15-1:30 p.m. CST

Break

1:30-2:15 p.m. CST

The FY2021 RNL Innovation Roadmap



Josh Robertson—Senior Vice President for Product Strategy, RNL

RNL is leading change, and helping our partners adapt and excel in this challenging time. Remote ambassador engagement, prescriptive analytics, artificial intelligence, and new digital engagement tactics are changing fundraising. Hear from RNL's chief innovator what we're doing next to transform donor engagement and results from early adopters.

2:15-2:30 p.m. CST

Break

2:30-3:30 p.m. CST

Key Issues in Advancement Fishbowl Discussions

Participate in an online discussion with fellow leaders in small groups organized around key innovation issues, including:

Digital Engagement Centers

Hosted by: *Miranda Fagley, Associate Director of Annual Giving, Carnegie Mellon University; Chad Warren, Vice President and Senior Consultant, RNL; and Kadisha White, Engagement Center Manager, RNL*

Budget and Resource Strategy

Hosted by: *Chris Sorenson, Vice President, HIYA (RNL Partner); and Chris Bingley, Senior Vice President, RNL*

Student Philanthropy Engagement (with and without students on campus)

Hosted by: *Audrey Leland, Student and Young Alumni Philanthropy Officer, Tufts University; and Dayna Carpenter, Vice President and Senior Consultant, RNL*

Donor Acquisition on a Budget

Hosted by: *Barbie Terry, Assistant Vice President for Development, University of North Alabama; Heather Kopec, Director of Annual Giving, Virginia Tech; and Jay Finney, Vice President, Fundraising, RNL*

Engaging Major Donors in Times of Crisis

Hosted by: *Aaron Escobar, Vice President for Development, Oregon State University Athletics and Senior Associate Athletic Director, Oregon State University; and Justin Marquart, Vice President, Fundraising, RNL*

Leadership Annual Giving and Mid-Level Donor Strategy

Hosted by: *Sarah Myksin, Director of Annual Giving, DePaul University; and Greta Daniels, Vice President, Fundraising, RNL*

Managing Staff Remotely

Hosted by: *David Jones, Executive Director for Annual Giving and Constituent Development, University of Georgia; Sylvia Vandever, Director, Operations, RNL; and Katie Coats, Engagement Center Manager, RNL*

Building Analytics Capacity

Hosted by: *Jennifer MacCormack, Senior Director, Annual Philanthropy & Advancement Analytics, University of Washington; and Josh Robertson, Senior Vice President, Product Strategy, RNL*

Young Alumni Engagement

Hosted by: *Rebecca Trump, Associate Vice President, Annual Giving, Rutgers University; Montrell Cartwright, Engagement Center Support Specialist, RNL; and Chad Friedlein, Vice President, Client Success, RNL*

Social Networks and Lifetime Learning

Hosted by: *Brooks Hull, Vice President for University Advancement, Louisiana Tech; and Stephanie Soscia, Senior Vice President, Account Management, RNL*

3:30 p.m. CST

Afternoon consult time with RNL consultants

Friday, September 18

Morning consultation time with RNL consultants

10:00-10:45 a.m. CST

Amplify Lifetime Engagement with LinkedIn



Jarrod Butler—Account Executive, Enterprise Education, LinkedIn

Chantal St.Louis Augustin—Lead, Education Vertical Marketing, LinkedIn



LinkedIn is where your alumni and top supporters gather to connect with peers, seek information, and build their careers. It is also where your institution can engage its network with lifelong opportunities to continue education, spotlight what's new on campus, and give back to their alma mater.

New platform engagement tools are making it easier than ever to reach your student network with these updates and opportunities at the right moments of their personal and professional lives. Join LinkedIn experts as we unpack what this powerful networking tool can do to amplify your alumni and supporter engagement.

10:45-11:00 a.m. CST

Break

11:00-11:30 p.m. CST

Challenging the Norm in Donor Relations



Lynne Wester—Donor Relations Guru

What are the emerging trends in our field? What are top shops focusing on? And what are the challenges that face our field? Join us to learn where we're headed in the future and to explore the unique challenges facing the field.

Armed with information from three "pulse of donor relations" surveys spanning multiple years, we will examine the changing landscape of donor relations, our future partnerships in fundraising, and what type of talent we need to drive our profession forward.

11:30-11:45 a.m. CST

Break

11:45 a.m.-12:30 p.m. CST

Advancement Leaders Panel: the FY21 Outlook



Hosted by: Chris Bingley, Senior Vice President, RNL; and Meg Weber, Vice President, RNL

Panelists:



Karl Miller Lugo—Vice President for Advancement, University of Texas at San Antonio

Lori Redfearn—Assistant Vice Chancellor of Systemwide Advancement, California State University



Josh Harraman—Vice President for Alumni Engagement, Annual Giving, and Advancement Communications, Rutgers University



Colleen Fitzpatrick—Vice President for Advancement, Middlebury College

12:30-1:00 p.m. CST

Key Innovation Download—choice of three concurrent sessions

Join RNL's innovators and special guests as we explore key strategies for utilizing these next-generation donor engagement tools. Bring your “to do” list, because you’ll get a download of actionable strategy on how to utilize these tactics to meet your goals!

Integrated P2P Texting



Hosted by: Shad Hanselman, Associate Vice President, Annual Giving, RNL

Special Guests:



Deidra Miles—Director of Annual Giving, University of Massachusetts, Lowell

Sarah Kathryn Hickman—Assistant Vice President, Alumni Engagement and Annual Giving, Baylor University

Your engagement with donors can get a massive boost from P2P texting technology operated at scale. Boost appeals, special campaigns, crowdfunding, giving days and events with this tested and popular technology that lets you interact with donors in real time.

Personalized Video



Hosted by: Eric Billings, Associate Vice President, Digital Product Management

Special Guest:

JD Beebe—Co-Founder and CEO, ThankView

There's nothing like a personal message from a real person, and you can use video messages to engage supporters in many ways. Learn from ThankView's founder and the RNL team how this technology can be integrated into all your campaigns, including annual giving, major gifts, and phone programs.

Maximizing Phone Impact



Hosted by: Brian Cass, Vice President for Client Success, RNL

How do you call the right people at the right time, with the right message? How do you break through spam blockers, and get your outreach answered with high impact? We'll show the latest technology in Visual Caller ID, reputation management, and predictive analytics to help maximize contacts with real, live donors.

1:00-1:30 p.m. CST

Key Innovation Download—choice of three concurrent sessions

Join RNL's innovators and special guests as we explore key strategies for utilizing these next generation donor engagement tools. Bring your "to do" list, because you'll get a download of actionable strategy on how to utilize these tactics to meet your goals!

AI-Driven Personalization



Hosted by: Peter Caron, Vice President, Software Products, RNL

Special Guest: Mark Sanders, Director of Information Systems, Georgia Tech

You can now use the power of artificial intelligence to connect your donors to what they care about most. The key: listen to what your supporters do, and then serve them content that matches. Learn how to boost engagement, event attendance and giving through this easy-to-implement technology.

The Remote Digital Engagement Center



Hosted by: Shad Hanselman, Associate Vice President, Annual Giving, RNL

Special Guests:

Pamela Chan—Senior Director of Direct Response, University of California, Berkeley

Howard Heevner—Executive Director of Annual Programs, University of California, Berkeley



That thing we used to call phonathon has evolved, and it's now operating remotely when we can't be in a room together. The modern digital engagement center isn't a place; it's a strategy. And enabling student engagement ambassadors to contact supporters across phone, email, text, and video in an integrated way can massively amplify results.

Crowdfunding and Giving Days



Hosted by: Kristin DeMarco Carroll, Senior Client Solutions Consultant, RNL

Special Guests:

Ryan Lawrence—Associate Director of Digital Philanthropy, University of California, Berkeley

Phillip James—Associate Director, Annual Giving, The University of Cincinnati Foundation



Crowdfunding and Giving Days are now in use by over 90 percent of institutions, and the technology is constantly evolving to help us better engage donors. Find out what's new, and learn best practices in encouraging donors to give socially and right now from experts who are running top-notch campaigns.

1:30-2:00 p.m. CST

Innovation in Action Case Study: Southern Methodist University



Alexandra Stoops—Director of Direct Marketing, Southern Methodist University

Southern Methodist University has harnessed the power of omnichannel engagement to create a powerful donor experience with high ROI. Join us to hear how they've embraced new ways to connect with donors, and meet goals with high ROI.

2:00-2:15 p.m. CST

Break

2:15-3:00 p.m. CST

Key Issues in Advancement Fishbowl Discussions

Participate in an online discussion with fellow leaders in small groups organized around key innovation issues, including:

Micro-Campaigns and Affinity Engagement

Hosted by: Sean Devendorf, Senior Director of Annual Giving, Tufts University; and Karen LaMalva, Vice President and Senior Consultant, RNL

Working with Volunteers

Hosted by: Nicole Schroeder, Director of the Alumni Annual Fund, Carleton College; Dayna Carpenter, Vice President and Senior Consultant, RNL; and Samantha Stowell, Engagement Center Manager, RNL

Donor Engagement, Fundraising, and Acquisition During an Election Year

Hosted by: Becca Widmer, Director, Annual Giving, University Advancement, Drake University; and Jared Glass, Director, Operations, RNL

Working with Fewer Staff and Resources

Hosted by: David Jones, Executive Director for Annual Giving and Constituent Development, University of Georgia; and Autumn Horton, Vice President, Client Services and Call Operations, RNL

Crafting and Remaining Agile With Your FY21 Plan

Hosted by: Maggie Linn-Addison, Assistant Vice President, Alumni Engagement and Annual Giving, Regis University; and Meg Weber, Vice President, Fundraising, RNL

Re-Engaging Crisis Donors to Renew

Hosted by: Christina Sebastian, Senior Executive Director, Donor Relations and Broad-based Marketing at Columbia University in the City of New York; and Emily Richman, Director, Operations, RNL

Parent Fundraising

Hosted by: Molly Taylor, Senior Director of Annual Giving Programs, Direct Marketing and Participation, Washington University in St. Louis; and Chad Friedlein, Vice President, Client Partnerships, RNL

3:00 p.m. CST

Conference Close and Key Takeaways

Hosted by: Chris Bingley and Renee Vaillancourt

3:30 p.m. CST

Adjournment