

THE UNIVERSITY *of* TEXAS SYSTEM



FEBRUARY 23-25, 2014

AGENDA

SUNDAY - TUESDAY



SCHEDULE

At a Glance

Sunday, February 23

<i>Time</i>	<i>Event</i>	<i>Location</i>
3 – 7 P.M.	Registration Open	Lobby, Level 2
4 – 6 P.M.	Working Group Meetings	Level 1
4 – 6 P.M.	Newcomer's Program	Level 1
6 – 7:30 P.M.	Welcome Reception	Tejas Dining Room, Level 2

Monday, February 24

<i>Time</i>	<i>Event</i>	<i>Location</i>
7:30 A.M.	Registration Open	Registration Desk, Level 2
7:30 – 8:45 A.M.	Breakfast	Grand Ballroom, Level 3
7:30 – 8:45 A.M.	"Chiefs" Breakfast Meetings	Level 3
9 – 10 A.M.	Welcoming Remarks and Keynote Speaker	Grand Ballroom, Level 3
10 – 10:15 A.M.	Break	
10:15 – 11:30 A.M.	Breakout #1 – Concurrent Sessions	Levels 1, 2
11:45 – 1:15 p.m.	Chancellor's Awards Luncheon	Grand Ballroom, Level 3
1:15 – 1:30 P.M.	Break	
1:30 – 2:30 P.M.	Breakout #2 – Concurrent Sessions	Levels 1, 2
2:30 – 2:45 P.M.	Break	
2:45 – 3:45 P.M.	Breakout #3 - Concurrent Sessions	Levels 1, 2
3:45 – 4 P.M.	Break	
4 – 5 P.M.	Breakout #4 - Concurrent Sessions	Levels 1, 2
6 P.M.	Load shuttles for dinner	Whitis Street Entrance, Level 2
6:30 P.M.	Dinner on the Town	219 West (Downtown)
8:00 P.M.	First shuttle returns	

Tuesday, February 25

<i>Time</i>	<i>Event</i>	<i>Location</i>
7:30 – 8:45 A.M.	Breakfast and Roundtable Discussions	Grand Ballroom, Level 3
7:30 – 8:45 A.M.	Working Group Meetings	Level 3
8:00 A.M.	Registration Open	Registration Desk, Level 2
9:00 – 10:15 A.M.	Breakout #5 - Concurrent Sessions	Levels 1, 3
10:15 – 10:45 A.M.	Break	
10:45 – 11:45 A.M.	Breakout #6 - Concurrent Sessions	Levels 1, 3



AREA MAP

Monday Night Dinner

219 West

612 West Sixth St. | (512) 474-2194

ON THE CORNER OF 6TH ST. AND NUECES ST.



Directions to 219 West

Monday, February 24 | 6:30 – 8:00 pm

- 1) South on Guadalupe Street
- 2) Right on 6th Street
- 3) Between Nueces Street and Rio Grande Street (on Right)

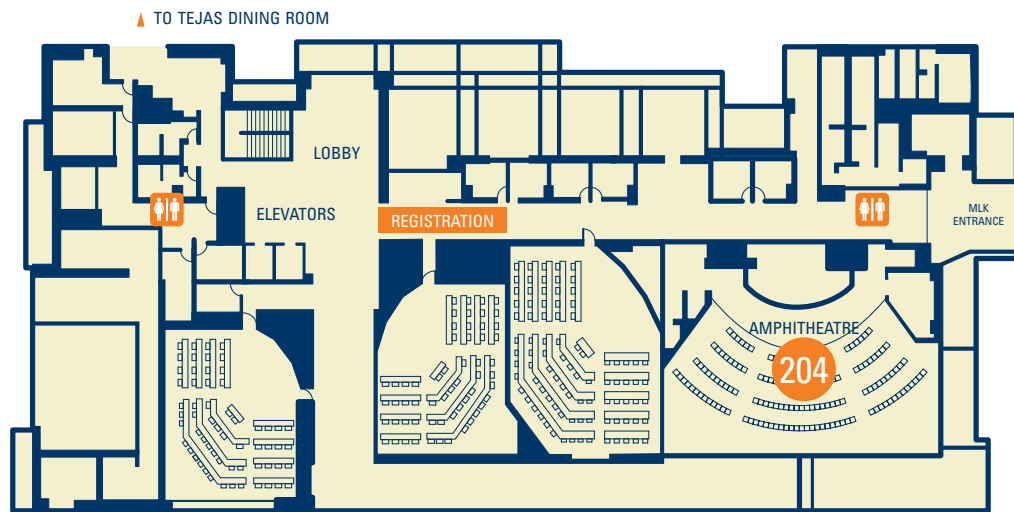
MAP

AT&T Executive Education and Conference Center

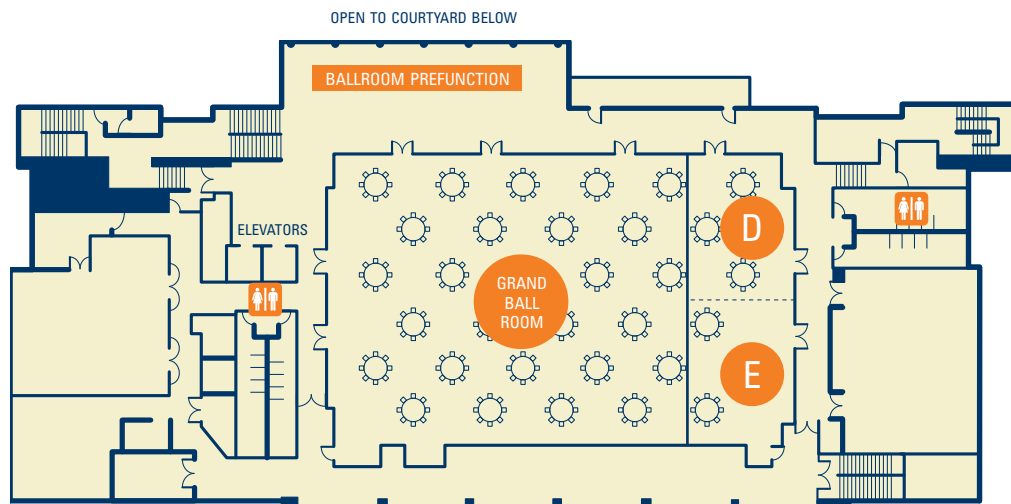
Level 1



Level 2



Level 3



SUNDAY FEBRUARY 23, 2014

3 – 7 P.M.

Registration Open | Lobby, Level 2

4 – 6 P.M.

Working Group Meetings**Endowment Compliance** | Classroom 107**Planned Giving** | Classroom 104

4 – 6 P.M.

Newcomer's Program | Classroom 103

Audience: Those new to the profession or the UT System

Consider this interactive session a prerequisite for System Seminar and your career within the UT System. Designed to introduce new professionals to the many facets of external relations (alumni relations, development, communications, advancement services, special events, etc.), as well as UT System resources available to you.

6 – 7:30 P.M.

Welcome Reception | Tejas Dining Room, Level 2

Meet up with colleagues and go to dinner together. A list of suggested restaurants will be available onsite (light refreshments served, cash bar).

MONDAY FEBRUARY 24, 2014

7:30 A.M.

Registration Open | Registration Desk, Level 2

7:30 – 8:45 A.M.

Breakfast | Grand Ballroom, Level 3

7:30 – 8:45 A.M.

"Chiefs" Breakfast Meetings**Chief Development Officers** | Salon D**Chief Public Affairs Officers** | Salon E

9 – 10 A.M.

Welcome Remarks and Keynote Speaker | Grand Ballroom, Level 3

RANDA S. SAFADY

Vice Chancellor for External Relations, UT System

Higher Ed Next: Innovations that Will Change the Face of Public Higher Ed by 2015

STEVEN MINTZ

Executive Director, Institute for Transformational Learning, UT System

Public higher education is on the verge of far-reaching transformations, which will occur more quickly than most anticipate. At a time when public attention fixates on MOOCs, the truly transformational changes will occur in program design, pedagogy, delivery methods, certification models, assessment strategies and business models. Catch a glimpse of the transformations that will fundamentally alter public higher education over the next 24 months.

10:00 – 10:15 A.M.

BREAK

10:15 – 11:30 A.M.

BREAKOUT #1 - CONCURRENT SESSIONS | Levels 1, 2

The Basic Principles for Fundraising Success | Classroom 102 | [DEV](#)

JERRI LYNN SCHOOLEY

Associate Vice President for Development, UT Arlington

This session explores the basic principles of fundraising as well as the characteristics and skills needed to be a successful development officer. In addition to competency, development officers must have an understanding of the basic principles for identifying, cultivating, soliciting and stewarding prospective donors. These principles never change and are valid regardless the size of the institution. This program covers the role of development utilizing the Pyramid of Giving: annual, major and deferred giving. Learn the purpose for each level of giving and how it relates to the Donors Cultivation Lifecycle: identification, information, interest, involvement and investment.

Creating a Pipeline for Testamentary Gifts | Classroom 103 | [DEV](#)

LAURA HANSEN DEAN

Executive Director of Gift Planning, UT Austin

KENT HAMILTON

Senior Director, Planned Giving & Gift Administration, UT Health Science Center - San Antonio

Creating a pipeline of testamentary gifts that eventually produces regular distributions requires strategic and consistent efforts. This session will discuss the elements of such plans based on recent research about testamentary donors.

Measuring Philanthropy: Are We All Counting the Same Way? | Classroom 106 | [ADV](#)

ANN KAPLAN

Director, Voluntary Support of Education Survey (VSE), Council for Aid to Education (CAE)

Attend this session to better understand VSE and CASE reporting standards. Why measure? What is the importance of uniform standards? What do you need to know about using the VSE? This is your opportunity to hear directly from Ann Kaplan and raise your questions.

Ding Dong the Press Release is Dead: The Evolved Story Pitch | Amphitheatre 204 | [COM/PUB](#)

JOSH HINKLE

Political Reporter, KXAN News

REEVE HAMILTON

Reporter, The Texas Tribune

KATHERINE MANGAN

Senior Reporter, The Chronicle of Higher Education

Step out of the dark ages and into the light! Traditional press releases alone aren't sufficient as the sole method for organizational story pitching. Attend this panel discussion of expert journalists as they discuss how they decide what to cover and what universities can do to improve and expand their coverage.

Leadership is (Still) Not Management | Classroom 101 | [GEN](#)

SUSAN FRANZEN

Director of Shared Services Innovations, UT System

Someone once said, "I completed a 360 review and was told I have no leadership skills. That must be wrong, because I've been managing for over 30 years!" Leadership and management are not the same. The distinction between the two may be simple, but its application may not be. In this session you'll learn about the skill sets that are required for each role, and how to assess your management and leadership skills.

11:45 – 1:15 P.M.

Chancellor's Excellence Awards Luncheon | Grand Ballroom, Level 3

RANDA S. SAFADY

Vice Chancellor for External Relations, The University of Texas System

FRANCISCO G. CIGARROA, M.D.

Chancellor, The University of Texas System

Awards Presentation

1:15 – 1:30 P.M.

BREAK

1:30 – 2:30 P.M.

BREAKOUT #2 - CONCURRENT SESSIONS | Levels 1, 2

Donor-Centered Fundraising | Amphitheater 204 | DEV/ADV

PENELOPE BURK

President, Cygnus Applied Research, Inc.

Many fundraising practices and beliefs were developed at a time when donors were less demanding, competition was not as fierce and fundraisers could rely on an unlimited pool of people willing to give. But today's donors are increasingly harder to reach and fundraisers need to know what donors want and how to provide it. Donor-Centered Fundraising is Penelope's breakthrough strategy that sustains donor loyalty and raises more generous gifts by bringing fundraising in line with donors' modern-day requirements.

The Alumni Participation Quandary | Classroom 103 | DEV

KEVIN FOYLE

Vice President for Development, UT Health

DIXIE MULLINS

Assistant Vice President for Alumni Relations, UTMB Galveston

Within educational fundraising programs, whether to allocate staff time and financial resources to increase alumni participation rates is a challenging question to answer. Leadership is often hesitant to redirect attention away from more immediately fruitful major and principal gifts to chase smaller participation gifts. In this session, we will discuss the ongoing need to create innovative pilot programs to expand your reach into new alumni populations.

Be Your Own Newsroom | Classroom 104 | COMPUB

TRACY HAMILTON

Project Manager and Chief Blogging Officer, CPS Energy

ROBERT RIVARD

Founder, The Rivard Report

LISA MARIE BAROCAS

Founder, LMG Communications

Take control of your organization's message and tell your own story. Attend this panel session to discover tools and strategies to create your own virtual newsroom.

Creating an Engaging Website and Uncovering the Heart of Your Brand | Classroom 106 | [COM/PUB](#)

BRAD LAWTON
Founder, BradfordLawton Branding

ANDREW LEVERENZ
Director of Online Communications, UT Arlington

TOM CUTHBERT
Managing Director, BradfordLawton Branding

NOELLE HEINZE
Online Communications Editor, UT System

Creating and maintaining an engaging website presents a unique set of challenges and opportunities. UT Arlington's Director of Online Communications Andrew Leverenz will discuss content strategy and management, developing a dynamic homepage and how to tell your story. Bradford Lawton and Tom Cuthbert of award-winning San Antonio firm BradfordLawton Branding will discuss overall branding strategy using a process called Connective Thinking™ to carefully define a brand and its intent to ensure that every form of communication is done in an accurate, consistent and cohesive manner and is carried through every touch point of an organization, company, product or service. The panel will be moderated by UT System Online Communications Editor Noelle Heinze.

Business and Tech Etiquette | Classroom 101 | [GEN/EVENTS](#)

SHARON SCHWEITZER
Founder, Protocol & Etiquette Worldwide, LLC.

Wondering how to respond to an awkward hug? Whether you are interacting in the boardroom, at the table or online, research shows that your success depends more heavily on “soft skills” rather than on technical knowledge. During this fun, interactive and informative session, etiquette and protocol expert Sharon Schweitzer will help you navigate through some of today's most challenging situations.

2:30 – 2:45 P.M.

BREAK

2:45 – 3:45 P.M.

BREAKOUT #3 - CONCURRENT SESSIONS | Levels 1,2

Donor-Centered Leadership: How to Build a High Performance Fundraising Team | Amphitheater 204 | [DEV/ADV](#)

PENELOPE BURK
President, Cygnus Applied Research, Inc.

In this session, Penelope tackles one of the most frustrating and costly problems – the high turnover rate of fundraisers. Backed by four years of research with more than 16,000 professional fundraisers, CEOs, board members and donors, Donor-Centered Leadership offers surprising statistical evidence about why good fundraisers – both professional and volunteer – move on prematurely and what it will take to keep them on the job longer and working productively. In plain language, Penelope shows employers how they can easily measure the real cost of premature staff turnover and the financial benefits of bringing this pressing problem under control.

Unlocking the “Perfect Gift”: Planned Giving’s Role in Major Giving Success | Classroom 102 | [DEV](#)

KELSEY EVANS

Assistant Dean for Development, College of Natural Sciences, UT Austin

KEVIN PICKETT

Executive Director for Development, MD Anderson

This session will discuss donor-centered gift planning strategies for both current and deferred major gifts. How to initiate gift planning conversations, overcome donor objections and review most commonly used strategies and when best to use them will be covered.

Crowdfunding in Higher Education | Classroom 104 | [DEV/ADV](#)

SHAD HANSELMAN

Senior Director of Annual Giving, Arizona State University

Crowdfunding has become an exciting new topic in the fundraising field and can be a powerful tool for engagement, education and philanthropy when incorporated into an advancement program. This session will review key facts about crowdfunding and discuss how Arizona State University implemented a comprehensive program in 2013.

Social Media Playbook | Classroom 103 | [COM/PUB/GEN](#)

DEBI PFITZENMAIER

Founder and Strategist, PfitzPR

In football, a playbook contains the descriptions and diagrams of the plays the team may run during a game. It’s defined, tactical, and puts everybody on the same page. In social media, a playbook can accomplish the same thing, whether you’re a team of two or 20. In this session, we’ll define what a playbook is; what goes into creating one; what you need to consider for internal and external processes; as well as discussing the who, what and why of conversations.

Prepare and Present an Effective Presentation | Classroom 101 | [GEN](#)

JOE SERIO

Keynote Speaker, Trainer, Joe Serio Enterprises

Presentations can make or break your work regardless of subject matter. Join Joe as he walks you through preparing for and presenting an engaging presentation.

3:45 – 4 P.M.

BREAK

4 – 5 P.M.

BREAKOUT #4 - CONCURRENT SESSIONS | Levels 1, 2

A Holistic Approach to Corporate Relations | Classroom 104 | DEV/COM

STELLA T. WIXOM

Executive Director, Business Engagement Center, University of Michigan

Discover a proven one-stop shopping model for corporate America and your institution. Learn the University of Michigan's innovative strategy that enables corporations to easily engage the many facets of a leading research university. What did the university do internally to make this happen? Fundraising and communications professionals won't want to miss this presentation.

"Friendraiser" to Fundraiser: Harness the Passion (and Power) of Your Constituents | Classroom 102 | DEV

JEFF MELTON

Executive Director of Development, McCombs School of Business, UT Austin

KEARY KINCH

Alumni Director, McCombs School of Business, UT Austin

Peer-to-peer (P2P) fundraising has become the gold standard in charity fundraising for donor acquisition. Recent studies have shown P2P-acquired donors have a higher retention rate than traditionally-acquired donors and give more over time. Learn how the UT Austin McCombs School of Business applied some of these practices, drastically increasing both alumni participation and annual giving revenue. Get practical tips to increase engagement and support from your own constituents.

Cornucopia of Advancement Services Challenges | Classroom 106 | ADV

STAN LEDBETTER

Assistant Vice President, Development Services,
UTMB Galveston

CHANDRA McTYRE

Senior Development Specialist - Gift Acceptance,
UT System

BRIAN WILLEY

Assistant Director Of Development, UT Austin

LAURIE OSMAN

Business Analyst, UT System

JAN HOPSON

Director of Gift Planning Services, UT System

Join our panel of seasoned advancement services professionals for a conversation on complex gift administration scenarios. Topics will include, but will not be limited to, a discussion of acceptable endowment restrictions, primer on naming policy, how to accept and enter gifts not conforming to policy and what's the buzz about crowdfunding. Feel free to bring your own questions and try and stump the panel.

Producing Engaging In-House Videos: A “How to” Guide | Classroom 101 | COM/GEN

CHARLIE PALAFOX
Video Production Coordinator, UT System

SPENCER PEOPLES
Director of Photography/Editor, Media, TX

Attend this beginner’s guide to shooting and editing engaging video content. Take a step forward into the often uncharted waters of video production for dummies.

Simple Strategies for Better Event Marketing | Classroom 103 | COM/EVENTS

DEBI PFITZENMAIER
Founder and Strategist, PfitzPR

Are events at the heart of your university or department? Do you regularly bring your students, alumni or donors together for events? Are you looking for some simple strategies that you can use to run a successful event? If so, this session is for you. In it, we’ll review the basics and some time-tested insights that will help you make the most of your next event.

6 P.M.

Load Shuttles for Dinner | Whitis Street Entrance, Level 2

6:30 P.M.

Dinner on the Town | 219 West (Downtown)

8 P.M.

First Shuttle Returns to AT&T Executive Education and Conference Center

7:30 – 8:45 A.M.

Breakfast and Roundtable Discussions by Topic | Grand Ballroom, Level 3

Those not attending a breakfast working group meeting can join us in the Ballroom for roundtable topics by subject and profession.

7:30 – 8:45 A.M.

Working Group Meetings

Advancement Services Working Group | Salon E

UT Systemwide Database Working Group | Salon D

8 A.M.

Registration Open | Registration Desk, Level 2

9 – 10:15 A.M.

BREAKOUT #5 - CONCURRENT SESSIONS | Levels 1,3

Tips and Tricks: Taking Raiser's Edge to the Next Level | Salon D | [ADV](#)

TIFFANY CRUMPTON

Director of Solution Management and Business Strategy, Blackbaud

The Raiser's Edge (RE) is a very powerful tool to help organizations manage constituent relationships, increase fundraising effectiveness and provide all of the donor management and fundraising capabilities you need to connect with constituents and raise money anytime, anywhere. In this session, Tiffany will take you through how to utilize best practices and proven tips and tricks to help you take your use of The RE to the next level. From recommendations on how to best navigate RE to how to best harness the power of Query, Tiffany guarantees there is something for everyone to learn in this session.

Driving High Performance: The Factors Affecting Gift Officer Productivity | Classroom 105 | [DEV](#)

JOSH KENISTON

Data Solutions Manager, Eduventures, Inc.

Drawing on past research and a forthcoming study on the topic, Eduventures will explore what it really takes to ensure high-performance for gift officers. We will review the most recent benchmarks emerging from a study that reveals the metrics, goals and targets that drive major gifts success. From there, we will reveal the goal-setting and management practices that help foster this success.

Planned Giving: Who Needs to Know? | Classroom 103 | [DEV](#)

LAURA HANSEN DEAN
Executive Director of Gift Planning, UT Austin

LUCY GARCIA
Director of Gift Planning, UT El Paso

JEFFREY STEED
Senior Director of Gift Planning, UT Arlington

SHELLEY ROBSON
Senior Director of Gift Planning, MD Anderson

Planned Giving has become an important gift strategy. How do I best market my planned giving program? You are invited to a panel discussion that explores helpful ways to advance planned giving.

Roadmapping Communications: Creating and Implementing a Strategic Communications Plan

Classroom 104 | [COMPUB](#)

LISA MARIE BAROCAS
Founder, LMG Communications

JENNIFER HARRIS
Owner, JWH Communications

Developing a strategic communications plan can be a daunting task. Join communications gurus Lisa Marie Barocas and Jennifer Harris as they discuss the ins and outs of developing and implementing a strategy for your communications.

Innovative Approaches to Career Path Planning | Classroom 106 | [GEN](#)

JEAN GROVE
Director of Employee Services, UT System

BETSY CLARDY
Vice President and Chief Development Officer, UTMB Galveston

In the past, people selected a focus area for their career and they usually remained in that area of work for their entire career. Today the average person changes jobs about 11 times spanning multiple careers over their working years. This session will look at using creative thinking to identify good candidates. People can truly re-invent themselves for a new career.

10:15 – 10:45 A.M.

BREAK

10:45 – 11:45 A.M.

BREAKOUT #6 - CONCURRENT SESSIONS | Levels 1,3

Make Your Move: Building a Relationship Management Program from the Ground Up | Classroom 103 | ADV

KELLEY ATWOOD
Development Applications Administrator
UT Southwestern

KRISHNA KELLEY
Associate Director of Prospect Research and Management
UT Southwestern

AMANDA BILLINGS
Interim Vice President for Development
UT Southwestern

CAREN MCGRATTY
Director of Leadership Giving
UT Southwestern

MARY GULLEDGE
Director of Annual Giving
UT Southwestern

LAURIE OSMAN
Business Analyst
UT System

What makes an effective relationship manager? For our team at UT Southwestern, the answer lies in something familiar to our department: collaboration. Through meetings, feedback, reports, more feedback and a donor-centric approach to fundraising, we have designed a relationship management program and tracking system to meet our needs. Whether you are just starting out or looking for ideas to refresh your existing program, join us for an interactive presentation and discussion about using teamwork to build a system from the ground up. You'll also learn how The Raiser's Edge can make your relationship management program more efficient by segmenting your database, tracking your research findings and staff activity and monitoring success.

Effective Messaging in Your Stewardship: Why Your Marketing Team Should be Fundraisers (or Learn to Think Like Them) Classroom 104 | DEV/COM

AARON CONLEY
Vice President for Development and Alumni Relations, UT Dallas

SARA MANCUSO
Director of Development Communications, UT Dallas

UT Dallas is nearing completion of the first campaign in its history, achieving a \$200 million goal nearly a year ahead of schedule. New stewardship tools developed for the campaign have helped UT Dallas acknowledge donors and have been used to inspire others to give. This session examines how to develop award-winning print and web-based campaign communication tools.

Trends in Young Alumni Engagement and Philanthropy | Classroom 105 | DEV

JOSH KENISTON
Data Solutions Manager, Eduventures, Inc.

Using their survey of over 90,000 alumni nationwide, Eduventures will highlight the trends affecting higher education philanthropy today with a special focus on how younger alumni compare to older generations.

The Shades of Philanthropy: Engaging Diverse Communities | Classroom 106 | [DEV/ADV](#)

JACKIE PIERCE

Major Gift Officer for Diverse Constituencies, The University of North Carolina at Chapel Hill

ROBIAUN CHARLES

Executive Director of Development, Division of Diversity and Community Engagement, UT Austin

PRISCILLA CORTEZ

Director of Development, Center for Enhancing Philanthropy, UT System

Texas has experienced rapid population growth with significant increases in ethnically and racially diverse communities, a trend that will continue for the foreseeable future. The impact of this trend can be seen in higher education, as the UT System now serves a majority-minority student population. Naturally, as the student population becomes more diverse, so too will the alumni base. Learning how to use diversity as a strategic opportunity to better engage and cultivate alumni of color will be critical to an institution's philanthropic success. Panelists will share practices of philanthropy within diverse communities and share specific outreach, marketing, and professional recruitment activities that can be implemented at your campuses.

Social Media: Building Your Brand and Attracting Fans | Salons DE | [COMPUB/GEN](#)

MEGAN MAISEL

Director of Integrated Media Communications, MD Anderson

When it comes to creating a successful social media campaign, a consistent brand is key. Without a distinct brand and clear voice, you become just another face in the crowd. Success in the social realm doesn't happen overnight though. Check out this session to see how MD Anderson has applied social media tools to grow and engage their following.



FEATURED SPEAKERS



STEVEN MINTZ, PH.D.

Steven Mintz is Executive Director of the University of Texas System's Institute for Transformational Learning, which is charged with improving student learning outcomes and fostering innovation across the System's nine universities and six health institutions. A former fellow at the Center for Advanced Study in the Behavioral Sciences and the author and editor of 13 books, Dr. Mintz came to the University of Texas System from Columbia University, where he was a professor of history and director of the Graduate School of Arts & Sciences Teaching Center. A pioneer in the application of new technologies to teaching and research, he created the Digital History website and served as president of H-Net: Humanities and Social Sciences Online. He is also past president of the Society for the History of Children and Youth and past chair of the Council on Contemporary Families.



FRANCISCO G. CIGARROA, M.D.

Chancellor Francisco Cigarroa leads one of the nation's largest systems of higher education, with nine academic institutions and six health institutions that educate more than 213,000 students and employ 87,000 faculty and staff. Dr. Cigarroa is a nationally-renowned leader in higher education as well as a highly-respected transplant surgeon. Prior to becoming chancellor, he served as president of the UT Health Science Center in San Antonio. A native of Laredo, Dr. Cigarroa became the first Hispanic chancellor of the UT System when he was appointed by the Board of Regents in 2009. President Barack Obama appointed Dr. Cigarroa to serve as commissioner on the White House initiative on Educational Excellence for Hispanic Americans, and in 2013, Dr. Cigarroa received the Chair's Award, one of the highest honors by the Congressional Hispanic Caucus. As chancellor, Dr. Cigarroa has championed student access and success and has been a leader in the establishment of two UT medical schools and the University of Texas Rio Grande Valley.



SPEAKER ROSTER

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Major Gift Officer for Diverse Constituencies
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