

The New Rules of Engagement
May 17, 2016
Houston, Texas (UT Health's Cooley Center)
10:30 am - 3:30 pm

AGENDA

Morning Sessions

State of the Union

10:30 – 11:10 am

- Introductions and outline for the day
- High-level trends impacting our work
- Changing preferences and motivations of Millennials and Generation X donors and volunteers

The New Rules of Engagement

11:10 – 12:30 pm

- Rule One: Make It Easy to Say Yes
- Rule Two: Meet Them Where They Are
- Rule Three: Broker Smarter Matches
- Rule Four: Embrace the “Me” Factor
- Rule Five: Cultivate Allies

Lunch

12:30 – 1:00 pm

Afternoon Sessions

Development, Advisory, and Volunteer Boards in 2020

1:10 – 3:10 pm

- Volunteer “strikeforce” concept
 - *Exercise: Build your own strikeforce*
 - University and health institution advisory boards
 - *Exercise: Streamline existing group*
- Implications for campaign volunteers and setting philanthropic expectations
 - *Exercise: Applying to your own institution*
 - Case studies of development strategies for boards

Closing Remarks

3:10 – 3:30 pm

- Brainstorming for the future: Boards in 2025
- Changing nature of board, alumni, and volunteer engagement