



RNL
AIS
2022
Virtual

AGENDA

September 14-15, 2022

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Note: Times on this agenda are in Central Time. However, in the virtual environment, times displayed appear in your time zone (the time zone you have your computer set to).

Wednesday, September 14

10:00-11:00 a.m. CT

Morning Wake-Up Sessions: The Wheel of Fundraising *LIVE*

With the RNL Team and Special Guests

Join us for this informal session where RNL experts join you to discuss key donor engagement topics, technology, and strategy as we “spin the wheel.” Wondering how to use texting? How can you enhance your giving day? What’s the best way to coordinate email and direct mail? This and many more topics in this morning’s kickoff session.

11:00 a.m.-12:00 p.m. CT

Event Welcome

Sumit Nijhawan—CEO, RNL

Opening Keynote: The Future of Donor Participation *LIVE*

Louis Diez—Founder, The Donor Participation Project

While mega-gifts make the news, overall participation in formal philanthropy is declining nationally. This is a challenge to our deep-rooted philanthropic culture. And because we know that major givers are much more likely to give after years of engagement, could impact us down the road as we seek big gifts. Join Louis Diez, who launched the Donor Participation Project in 2020 to connect fundraisers who want to transform donor engagement and reverse this trend. It’s time to take action and engage an inclusive, action-oriented and purposeful donor base.

12:00-12:15 p.m. CT

Break and Innovation Lounge Sessions

Head over to the RNL Innovation Lounge to view blogs, podcasts and videos that offer insights on key donor engagement trends, new technology and insights from RNL partners to kickstart your creativity and transform your donor engagement plan.

12:15-1:15 p.m. CT

Fundraising Leaders Panel: Donor Engagement in the New Normal

Howard Heevner—Executive Director of Annual Programs, University of California, Berkeley
Amy Wylie—Senior Director of Alumni Engagement and Annual Giving, Northern Kentucky University
Maggie Linn Addison—Assistant Vice President, Alumni Engagement and Annual Giving, Regis University
Sarah Kleeberger—Senior Consultant, RNL

The last few years have brought transformative change to the way we engage donors. Join this panel of senior fundraising leaders as we discuss the pivots we've made, what we'll keep for the future, and what's next as we engage donors in the new normal. Topics will include the future of campaigns, major and annual giving collaboration, the talent landscape, and how to engage key constituencies like affinity groups, students, and volunteers.

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

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

Special Event From RNL

Look for details on September 6.

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

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2:30-3:00 p.m. CT

Breakout Sessions

Major and Planned Giving Pipeline Amplification for FY23

Greta Daniels—Senior Vice President, RNL
Brian Gawor—Vice President for Research, RNL
And Special Guests

It's all about big gifts. That's the reality today as mega-donors drive transformation in our organizations. But, major gifts have to start somewhere. Join this strategy-packed session as we talk about how to amplify your major gift pipeline through coordinated donor engagement, while maximizing ROI. We'll share key tactics, new technology, and success stories of how consistent donor engagement can lead to big gifts faster, on budget, and with a better donor experience.

The Future of Giving Days

Maile Juranits—AVP, Digital Product Management, RNL

Theresa Jubert—Senior Client Solutions Consultant, RNL

Doug Patmore—Associate Director for Leadership Giving, Colorado State University

Giving days have transformed our annual donor engagement. Now we're asking: how do you keep your special day fresh and interesting, when we're all expected to "do it again next year, but with more." We'll share key tactics in challenges, matches and competitions, along with volunteer engagement strategies, and new ways to coordinate outreach to keep your giving day exciting.

Students as Ambassadors: Success with Digital Engagement Centers

Sarah Patterson—Vice President, Software, RNL

Michael Rath—Senior Consultant, RNL

Hayley Harris—Director of Annual Giving, University of North Carolina at Chapel Hill

Travis Hundley—Engagement Center Manager, RNL

For decades, student ambassadors have reached out to donors with high ROI. Things have changed, and what were once phone programs are now digital engagement centers, combining calling, texting and video to maximize ROI and the donor experience. Join this session to hear how to have the biggest success recruiting and retaining student ambassadors. And learn about key technology to stay connected and engaged, even in a remote/hybrid environment. Learn from experts about the best ways to organize your outreach to maximize results, and make giving easy for donors after a quality, personal conversation.

3:00 p.m. CT

End of Day One

Your donors love personal attention. We'd like to give you some, too.

Join a free consult session with RNL experts, on topics like:

- *Benchmarking Analysis: How your core metrics compare to peers*
- *The Fundraising Forecast: and fundraising in a challenging economy*
- *FY23 and Forward Planning: key strategies to meet your goals this year*

Grab your free consult time at RNL.com/AISConsult

Thursday, September 15

10:00-11:00 a.m. CT

Morning Wake-Up Session: Five Tough Fundraising Questions LIVE

The RNL Team and Special Guests

Grab a cup of coffee and join us as we discuss key topics in donor engagement and the advancement world. Be ready with your opinions on these tough questions:

- Is engagement important?
- Does alumni participation matter?
- Is unrestricted giving over?
- How do I get resources now for giving efforts that have long-term rewards?
- What should I try next?

11:00 a.m.-12:00 p.m. CT

Keynote: How to Change Anyone's Mind LIVE

Jonah Berger—Professor of Marketing at the Wharton School at the University of Pennsylvania and author of the bestselling books Contagious, Invisible Influence, and The Catalyst

Everyone has something they want to change. Fundraisers want to increase donations and leaders want to change organizations. Employees want to change their boss' mind and non-profits want to change the world. But change is hard. We push and push, but often nothing happens. Could there be a better way? This session introduces a revolutionary approach to change. Successful change isn't about pushing harder or exerting more energy. It's about removing barriers. Overcoming resistance by reducing friction and lowering the hurdles to action. Discover the five hidden factors that impede change, and how by mitigating them, you can change anything.

12:00-12:15 p.m. CT

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12:15-12:45 p.m. CT

Breakout Sessions

Fundraising in a Tough Economy

Chad Warren, DPP—Vice President and Consultant, RNL

Laura MacDonald—Chair of Giving USA 2020-2022 and Founder and Principal, Benefactor Group

Will a recession kill our fundraising? No, but we'll need to adapt as we engage donors in a challenging time. Join experts who have "been through this before" as we share key trend data over the past five decades to inform our strategy about donor engagement during periods of economic stress. Spoiler alert: it's about engagement, and what you do during a recession greatly impacts your results when things improve.

Crowdfunding Success for FY23

Maile Juranits—AVP, Digital Product Management, RNL

Theresa Jubert—Senior Client Solutions Consultant, RNL

Johnyelle Lee—Senior Director of Advancement Services, Elizabeth City State University

Crowdfunding is a key way to involve stakeholders across your organization, and launch campaigns of all sizes that demonstrate impact and amplify urgency. We'll talk about key trends in crowdfunding, and how using the Evergreen Online Giving Page can help transform your annual giving strategy for FY23.

Using Texting to Amplify Engagement and Fundraising Success

Autumn Horton—Senior Consultant, RNL

Sarah Winter Robinson—Associate Director, Integrated Marketing, Cornell University

Jon Gregory—Associate Director, Donor Participation & College and Unit Partnerships, Cornell University

Texting has become a key method to drive giving, and engage your supporters at scale. Join this session to hear about key tactics for integrating texting into your outreach strategy, and combining with other channels to maximize the donor experience. We'll share real examples of text exchanges with donors that show getting on the texting bandwagon can make a big difference for your engagement.

How to Use CASE Data, the VSE and Alumni Engagement Metrics to Inform Your Strategy

Jenny Cooke Smith—Senior Director, CASE AMAtlas Services

Ann Kaplan—Senior Director, Voluntary Support of Education (VSE), CASE

Brian Gawor—Vice President for Research, RNL

There's a ton of data available to benchmark your program with peers, and for higher education fundraisers, CASE is the nexus. Join us for this concise rundown of key CASE data sources that you can utilize for insights, along with key tips on submitting your data in a time that we're all challenged with limited staff resources. And, hear how the CASE Alumni Engagement Metrics (AEM) are changing how we look at engagement, and how you can access and use these key data sources to inform your success.

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

Breakout Sessions

Using AI to Personalize the Donor Experience

Solomon Grey—Senior Project Manager, RNL

L.B. Lyons—Director of Alumni Relations, Grand View University

Carrie Sponheim—Director of Annual Giving, Grand View University

Providing a personalized experience at scale is key to engaging donors, and it matches what key brands are doing for us every day. Join this session for an update on the technology that lets you send unique messages to each donor, based on their actual observed interest. And hear how organizations have used AI as way to enhance personal outreach, and truly listen to what donors care about.

The Power of Personalized Video for Donor Engagement

Becca Widmer—Senior Consultant, RNL

Dara Goldhagen—Assistant Director, Direct Marketing, University of Pittsburgh

Using video to engage your supporters, whether it's personal messages or sending key updates at scale, is a crucial tactic for success with today's donors. Join this session to learn where you can use video messages (Including with platforms like ThankView and Gratavid) to drive giving and boost engagement. And learn how AI-personalized videos can help you thank and engage donors with a message unique to their interests and giving history.

The Future of Advancement Analytics

Josh Robertson—Senior Vice President, Product Strategy, RNL

Brian Gawor, Vice President, Research, RNL

Geoffrey Bartlett—Assistant Vice President for Strategic Initiatives, University at Buffalo

Keeping track of your activity, results, and donor engagement is crucial. But how do you visualize, share and keep data top of mind as you make key decisions? Join this session to hear about enhancements to actionable data sources and systems to help drive your success. We'll include results monitoring, the use of predictive modelling to target the best prospects, and key omnichannel engagement monitoring strategies.

The Future of Donor Engagement: Young Alumni

Shay Galto—Director of Strategy, The Mom Complex

Dayna Carpenter—Senior Consultant, RNL

Amy Burke, Senior Director of Annual Giving Programs, Wellesley College

From 2019 to 2021 RNL partnered with the Schuler Education Foundation to conduct the largest ever millennial alumni philanthropic research and strategy project. While 2021 feels like the far distant past, the applied learnings from are continuing to move the needle on young alumni engagement. As the most generous cohort to date, young alumni, especially those who identify as female, are making changes to the sectors they care about the most: the environment, social just, women-focused initiatives, and K-12 education. Join this session to learn how to provide a meaningful giving experience to this key constituency. If you're looking for ideas to engage your millennial donors, you'll leave with an actionable strategy.

1:30-1:45 p.m. CT

Break and Innovation Lounge Sessions

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1:45-2:15 p.m. CT

Breakout Sessions

The Future of Donor Engagement: The RNL Innovation Roadmap

*Josh Robertson—Senior Vice President, Product Strategy, RNL
And the RNL Innovation Team*

RNL has been investing in the next generation of donor technology. With key integrations across channels, and actionable insights from the massive store of data we have on donors, we're changing the game in donor engagement. Join this session to hear about key updates for RNL platforms, including RNL Engage, Digital Engagement Centers, ScaleFunder Giving Days/ Crowdfunding, and RNL QuadWrangle AI engagement.

The Future of Donor Engagement: Integrated Omnichannel Outreach

*Meg Weber—Vice President, Fundraising, RNL
Sarah Myksin—Vice President and Senior Consultant, RNL
Christian Wargo—Director of Annual Giving Programs, Direct Marketing & Participation,
Washington University in St. Louis*

The more channels you use to engage donors, the better your results. It's a truism in fundraising, and the technology to make your strategy "omnichannel" has never been easier or more cost-effective. Join this session with experts who have made all the channels work together to provide the best donor experience. Direct mail, phone, texting, video, and digital engagement can blend to make a big difference in your giving outreach.

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

Summit Wrap-Up

*Greta Daniels—Senior Vice President, RNL
Brian Gawor—Vice President for Research, RNL*

2:30 p.m. CT

Adjournment

Innovation Lounge and all recorded sessions will remain available through 12:00 p.m. CT on September 16. All attendees will receive a post-conference email with full access to recorded sessions for one year.