



Development Services Conference

11 - 12 March 2020

Renaissance Manchester Hotel, Manchester, UK

Section 2: Conference Programme

Track Guide

Gift Administration and Donor Care	Research and Analytics	Strategy and Planning	Systems & Information Management
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Tuesday 10th March 2020		
19:00 - 20:00	Development Services Conference Drinks Reception	Christie's Bistro University of Manchester, Oxford Rd, Manchester M13 9PL
Wednesday 11th March 2020		
08:30 - 09:15	<p>Newcomers Meet up Hosted by Tom Jirat, Head of Operations, University of Manchester and Chris Webber, Head of Advancement Operations, Royal Academy of Music</p> <p>Each year we're delighted to see more and more colleagues attending for the first time, and as you may already know networking is hugely important in our profession. This is an opportunity to meet each other and members of the Planning Committee before the programme kicks off. It's a great opportunity to network and aims to prepare you for and help you get the most out of what should be a stimulating and enjoyable - not to mention exhausting - two days.</p>	Michelangelo 1
08.15 - 09.15	Registration and Refreshments	Ballroom Lobby

09.30 - 09.40	<p>Welcome from CASE Europe and Welcome to Manchester</p> <p>Bruce Bernstein, Executive Director, CASE Europe</p>	Medici 2
09.40 - 09.50	<p>Suzie Thompson, Director of Development, Royal Northern College of Music</p>	Medici 2
09:50 - 10:00	<p>Welcome and Scene Setting from Conference Chairs and Planning Committee</p> <p>Charlotte Dewhurst, Associate Director of Development (Systems), University of Oxford</p> <p>Kate Brook, Director of Services, Development & Alumni, The University of Edinburgh</p>	Medici 2
10:00 - 10:45	<p>How to Innovate with Confidence</p> <p>Lucy Gower, Founder and Director, Lucidity</p> <p>A session on change, disruption and innovation. A mix of theory and practical exercises to inspire and energise delegates to innovate as well as get the most from their time at the rest of the conference including;</p> <ul style="list-style-type: none"> • What innovation and creativity mean and why they are important? • Why innovation is part of everyone's role • People make change happen and we're all change agents - if we choose to be • How to work with colleagues to influence and drive change • What stops you - tackling fear of change – this includes both fear of success and fear of failure • Stories and examples from across a range of sectors. • Simple and practical tools and tips to help shift attitudes and mindsets that can be put into practice straight away 	Medici 2
10:45 - 11:00	<i>Transit</i>	
11:00 - 11:45	Track Kick- Off Sessions	
	<p>Gift Administration and Donor Care</p> <p>Chair: Katherine Muller, Director of Operations & Donor Relations, Advancement, London Business School</p> <p>How the digital world is changing customer expectations around engagement, giving and stewarding. and how we can respond</p> <p>Speaker: Sarah Seedsman, Executive Director, Engagement, Insights and Consulting, Media Minds Global Ltd.</p>	

Research and Analytics	<p>Research and Analytics Track</p> <p>Chair: Sarah Gledhill, Head of Prospect Information and Analysis, University of Cambridge</p> <p>Speaker: Jennifer Shimp-Bowerman, Director of Advancement Services, University of Cambridge</p>	
Strategy and Planning	<p>Strategy and Planning</p> <p>Chair: Jude Aildred, Deputy Director, Development Services, University of Manchester</p> <p>What makes a great strategy and how do you make it happen?</p> <p>Speaker: Ruth Beckinsale, Director of Business Planning, London Business School</p> <p>How often do not-for-profit organisations truly reflect their strategy through their philanthropic proposition? And conversely, how often do executive leadership teams make strategic choices through the lens of the case for support? This session will look at the strategic planning process from organisational top to fundraising toe using London Business School as the case study.</p>	
Systems & Information Management	<p>Systems and Information Management Track</p> <p>Chair: Chris Webber, Head of Advancement (Divisional) Operations, Royal Academy of Music</p> <p>Technology to Reach our Audiences where they are (TBD)</p> <p>Speaker: Irfan Verjee, VP Business Value Group - Europe & Asia, Sprinklr</p>	
11.45 - 12.00	<i>Transit</i>	
12:00 – 12:45	Breakout Session 1	
Gift Administration and Donor Care	<p>Gift Administration and Donor Care</p> <p>Driving decision making and storytelling – Three case studies into the impact of financial reporting on your fundraising</p> <p>Speakers: Lisa Williams, Head of Operations - Global Advancement, University of Exeter</p> <p>Exeter Case Study: Historic endowment funds and cross-institutional working and awareness. Raising the awareness of Development without raising new money.</p>	

	<p>Speaker: Christian Propper, Head of Development - Marketing and Insights, University of Oxford Oxford Case Study: Discovery and sharing the impact of funds from Oxford £3.3B campaign. Demonstrating the value of this impact reporting.</p> <p>Speaker: Chris Webber, Head of Advancement Operations, Royal Academy of Music Academy Case Study: Guiding the fundraising ship through influencing & enabling decision makers by building financial reporting and data streaming frontline work to manage performance/ROI. How they enable us to work with finance, fundraisers and governing body.</p>	
Research and Analytics	<p>Research and Analytics Track A Tale of Transformation in the Research Function (TBD)</p>	
Strategy and Planning	<p>Strategy and Planning Being a Data Influencer: Getting a Seat at the Top Table to Drive Strategic Change Speaker: Martyn Clay, Senior Business Intelligence Analyst, Development and Alumni Relations, University of Cambridge</p> <p>In this session you will hear a case study about how the development of a 5-year business plan elevated the importance of data analytics in the organisation to become a leading partner for business planning and strategy.</p> <p>This presentation will take you through an example of a real-world business planning process, from initial scope and understanding past performance, through to the creation of a forecasting model and final delivery of the plan. You will see how at each stage having an analyst at the top table added value, reduced risk and helped embed a cultural change in the organisation. We will finish by giving examples of how the analytics team is now positioned as a key advisor at the centre of business planning and how embracing data can bring advantages to your organisation's strategic planning.</p>	
Systems & Information Management	<p>Systems and Information Management Track Digital Transformation Demystified: Reach, Engage and Retain Audiences Speaker: TBC, Salesforce</p> <p>Digital transformation is a buzzword, but what does it mean for Higher Education? Learn about how to best transform your institution, including aspects of change management</p>	

	<p>and looking both inside and outside the industry for best practises.</p> <p>Session breakdown:</p> <ol style="list-style-type: none"> 1. Define, describe and develop what does digital transformation mean for the corporate world and higher education (--> what do we mean by digital transformation and how has a product such as Salesforce encouraged digital transformation) 2. Digital transformation and technology: how does it impact: <ol style="list-style-type: none"> a) acquisition and retention b) the student journey c) the advancement office 3. What can the advancement office learn from corporates doing digital transformation <ol style="list-style-type: none"> a) positive alumni engagement requires positive student experience b) collaborate to affect change and become part of the change. c) supporting student, alumni through to lifelong learner 	
12.45 – 13.30	Lunch	Medici 1
13.30 – 14.15	Breakout Session 2	
<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center;"> Gift Administration and Donor Care </div>	<p>Gift Administration and Donor Care</p> <p>International Fundraising – We all have to do it – let’s do it as effectively as possible!</p> <p>Speaker: Nancy Bikson, Managing Director, Chapel & York International</p> <p>International Fundraising is on everyone’s radar. Yet it can drain time, energy and money. We will touch strategies which deal with tax, legal, stewardship, and culture. With lots of time for questions. The learning outcome: International Fundraising which is effective and profitable with an ROI you can be proud of.</p>	
<div style="background-color: #7099C0; color: white; padding: 5px; text-align: center;"> Research and Analytics </div>	<p>Research and Analytics Track</p> <p>Due Diligence and Gift Acceptance Panel</p> <p>Charles Kingston, Head of Prospect Research, University of Oxford</p> <p>Oliver Taylor, Development Research Manager, University of Manchester University of Manchester</p> <p>Jasmina Novak, Head of Prospect Development at London Business School</p>	

	Sarah Charlesworth , Manager, Philanthropic Due Diligence University of Cambridge	
Strategy and Planning	Strategy and Planning A Campaign Planning Case Study Speaker: Jennifer Macchia , Advancement Projects Officer, Royal Academy of Music and Cally Brown - Campaign Manager, Kew Foundation, Royal Botanic Gardens, Kew	
Systems & Information Management	Systems and Information Management Track Using data to inform marketing campaigns Speaker: Dan Keyworth , Head of Analytics and Data, University of Southampton	
14.15 - 14.30	Transit	
14.30 - 15.15	Breakout Session 3	
Gift Administration and Donor Care	Gift Administration and Donor Care Mid-Level Stewardship Programmes Speaker: Jen Waldron , Individual Giving Manager National Trust, Constance Greenfield , Philanthropy Manager, NSPCC	
Research and Analytics	Research and Analytics Track Prospecting Insights to Build Expertise Speaker: Charles Kingston , Head of Prospect Research, University of Oxford We are often encouraged to move from being seen as service providers to being seen as experts, but how do we go about achieving that? This session looks in particular at three strands of information and insights – from wealth and income populations; the profile of major donors; and the psychology of income – that we can use to build and share our expertise as advisers in prospect identification and strategy. Learning aims: <ul style="list-style-type: none"> • Reflect on our expertise and how we can bring it into action • Gain insights to use when developing prospecting strategies 	

<p>Strategy and Planning</p>	<p>Strategy and Planning Flexible Working – it's time for change Speaker: Gemma Dale, Wellbeing and Engagement Manager, University of Manchester</p> <p>Flexible working is becoming an important issue for all organisations as employee demand increases. Flexible working has the potential to address many of our current workplace challenges. This session will explore why it is time to radically rethink the way that we work and will provide practical insights for both individuals and organisations in how to achieve greater flexibility in where, when and how we work.</p>	
<p>Systems & Information Management</p>	<p>Systems and Information Management Track Microsoft Dynamics [Session Title TBD] Speakers: Jenny Wills, Associate Director of Supporter Operations, King's College London Sarah Howes, Associate Director of Development, University of Southampton, and Andrea Crowley, Deputy Director of Development (Strategy & Operations), University of Warwick</p>	
<p>15.15 – 15.45</p>	<p>Refreshment Break</p>	<p>Medici 1</p>
<p>15.45 – 16.30</p>	<p>Breakout Session 4</p>	
<p>Gift Administration and Donor Care</p>	<p>Gift Administration and Donor Care The new global edition of the CASE Reporting Standards - hear what's new and have your say about the UK chapter Speaker: 🍏 Jennie Moule, Founder, Alveo Consulting</p>	
<p>Research and Analytics</p>	<p>Research and Analytics Track Estimating Giving Capacity: Why Formulas (Usually) Don't Work – And What You Should Be Doing Instead Speakers: Oliver Taylor, Development Research Manager, University of Manchester and Toby Savin, Development Research Manager, University of Leeds</p> <p>2% of net worth? 5% of total liquid assets? Average annual donation x 5 – or x10? And do you need a number anyway? In this session, experienced prospect researchers Oliver Taylor and Toby Savin will examine the pitfalls of “accepted” formulas for establishing prospect giving capacity and suggest alternative methodologies that offer reliability and flexibility while leaving room for a much-undervalued ingredient – researcher intuition! We'll use practical examples to show where formulas can go wrong, look at the other clues which can help you get it right and give you the confidence to</p>	

	<p>explain to fundraisers why getting to a precise number is often a red herring anyway. You'll leave informed but, just as importantly, reassured.</p>	
<p>Strategy and Planning</p>	<p>Strategy and Planning Our Future: Crystal Balls, Jigsaws and Alumni 2.0 Speaker: Tom Jirat, Head of Operations, Development and Alumni Relations</p> <p>The 2010s saw growth in alumni populations, our profession and the impact it has. This growth shows little signs of slowing as we enter the 2020s. In this session we will gaze into a crystal ball – or rather, try and connect the pieces of an incomplete jigsaw – to examine what the future might hold for our profession. Inspired by work around the University of Manchester’s new strategic plan, ‘Our Future’, launched in January 2020, we will look at developments across population demographics, technology and regulation that may affect engagement with and fundraising from alumni in the future. In light of these developments we need to consider what we do, how we do it and why in order to position ourselves to take advantage of future opportunities and tackle potential threats. There are - perhaps inevitably - more questions than answers, but this session should give you some ideas about what we may need to be considering and inspire you to think about what we can do now (where we can!) to try to ensure we have the best chance of short, medium and long term success... and are ready for what may be ‘Alumni 2.0’.</p>	
<p>Systems & Information Management</p>	<p>Systems and Information Management Track The Connected Office: How interoperability can advance your institution without jeopardising your fundraising</p> <p>Speakers: Dan Keyworth, Director of Customer Success, International Markets and Jonathan Argent, Customer Success Manager, Blackbaud</p> <p>In our connected world, integration now more than ever has become a key topic of discussion. Whether it’s connecting multiple systems or consolidating fragmented data to help maintain a 360-degree view of your supporters, alumni and other stakeholders. In this session we will delve deeper into the integration space and explore how institutions successfully connect advancement into the wider ecosystem, with survey results and case studies from multiple institutions.</p>	

16.45 - 17.30	Digital Transformation (use of technology) (TBC) Speaker: Salesforce	Medici 2
17.30	Closing remarks	Medici 2
18.15 – 19.00	Drinks Reception	Ballroom Lobby
19.00	Dinner and Disco	Medici Ballroom

Thursday 12th March 2020		
08.30 - 09.15	Birds of a feather Networking and coffee	
09.30 - 10.30	<p>Analytics + Storytelling = Influence Speaker: Sam Knowles, Founder and MD, Insight Agents</p> <ul style="list-style-type: none"> • Increased confidence and competence in using data to build persuasive narratives • A clear understanding that data storytelling is fundamentally an act of empathy, not statistical skills 	Medici 2
10.30 - 11.00	Refreshment Break	
11.00 - 11.45	Breakout Session 5	
<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center;"> Gift Administration and Donor Care </div>	<p>Gift Administration and Donor Care Giving Days - What / Why / How? Speakers: Marie-Rose Delazun, Account Manager, Hubbub ... and Matt Ingram, Student and Young Alumni Officer, University of York</p> <p>Giving days are becoming an increasingly popular way to acquire new donors and to refresh regular giving strategies - but what are they and how do they work? Come to this session to find out more about this new way of fundraising globally that your colleagues may be considering. You'll hear an overview of what different institutions in the sector are doing, who needs to be involved, and why data and stewardship play a central role. The University of York were one of the first non-oxbridge institutions to try a giving day in November 2019 and smashed their target with over 450 donors! Matt Ingram will share some insights on lessons learned, and how it felt from inside their team!</p>	
<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center;"> Research and Analytics </div>	<p>Research and Analytics Track No one Wants a Michael Fish Moment: Creating Data-Informed KPIs for Major Gifts Fundraising Speakers: Joanna Carr, Head of Prospect Research, King's College London and King's Health Partners and Matthew Gorman, Director of Development, King's College London and King's Health Partners</p> <p>Have you worked with your Major Gifts teams to establish data informed KPIs? For the academic year 2019/20 King's College London set major gift KPIs which were based on a pipeline forecast and the prospect research team played a central role in forming and implementing these. The project demonstrated how fundraising and research teams can</p>	

	<p>collaborate to connect data analytics with the planning process, making a vital contribution to setting a realistic strategic direction.</p> <p>This session will take you through the knotty world of forecasting major gifts and look at how this project was managed at King’s from the point of view of both the research and fundraising teams. From agreeing targets to establishing how these are monitored, this candid discussion will provide a view of the many lessons learned along the way. In this session you will:</p> <ul style="list-style-type: none"> • Learn about the frameworks used for forecasting pipeline income for more mature and colder/ nascent pipelines, and the benefits and pitfalls of these frameworks • See examples of how to monitor KPIs through Power BI dashboards • Hear lessons learnt in how to (and how not to!) best collaborate with fundraising teams to create targets 	
<p>Strategy and Planning</p>	<p>Strategy and Planning</p> <p>TriOps: Greater than the sum of its parts - An interlinked approach to strategy and work practice</p> <p>Speakers: Fiona Newell, Gift Accounting Manager; Claire Hoath, and Heather Owen, Research and Strategy Partner, University of Birmingham</p> <p>Silo working is a strategic risk. This session will explore the collaborative approach Birmingham has taken, drawing on the knowledge and expertise of key areas such as Gift Accounting, Data, and Prospect Research, to minimise this risk. Let us showcase how our collaborative approach can benefit you and your teams.</p>	
<p>Systems & Information Management</p>	<p>Systems and Information Management Track</p> <p>Eliminate your backlog, motivate your team and improve your productivity</p> <p>Speaker: Aggie Osina, Head of Gift and Data Management, University of Cambridge</p> <p>“Let’s park it for now.” “Another rainy day project.” “Let’s try to tackle it next year.” “It feels like we are constantly chasing our tail.” “It doesn’t feel like we are getting anywhere.” “As soon as the Campaign is over, we will be able to do this.”</p> <p>Sounds familiar?</p> <p>Then come and join me as I share a few quick tips on how to eliminate your backlog, motivate your team and improve their overall productivity at the same time. I will be very honest and share lessons we recently learnt at Cambridge. Find out more</p>	

	<p>about juggling 'business as usual' with overcoming significant gift and data backlogs without needing extra resources or time. From sprints to marathons, tracking tools to process mapping – I promise to share simple, easy-fit and quick solutions to tackle the most persistent of backlogs and workloads (whilst remaining sane and motivated).</p>	
11:45 - 12:30	Unconference Session(s)	
12.30 - 13.30	Networking Lunch	
13.30 – 14.20	<p>Donors as Agents of Change Panellists: Paul Ramsbottom, Chief Executive, Wolfson Foundation and John Burgess, Governor, Royal Academy of Music Hosted by: 🍷 Kirsty MacDonald, Deputy Principal, Advancement, Royal Academy of Music</p>	
14.20 - 14.35	Transit	
14.35 – 15.20	Breakout Session 6	
<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center;"> Gift Administration and Donor Care </div>	<p>Gift Administration and Donor Care Building Effective Working Relationships with Internal Partners Speakers: Andrea Crowley, Deputy Director of Development (Strategy & Operations), University of Warwick, Kirsty Macdonald, Deputy Principal, Advancement, Royal Academy of Music, and Aggie Osina, Head of Gift and Data Management, University of Cambridge</p>	
<div style="background-color: #0070C0; color: white; padding: 5px; text-align: center;"> Research and Analytics </div>	<p>Research and Analytics Track The Alumni Engagement Pyramid Speaker: Stuart Thompson, Deputy Director, Advancement Services, Durham University</p> <p>When Stuart started at Durham we had very little in way of engagement data models, when looking to segment out alumni community for mailings and such we were producing individual queries on various data points but nothing in a systemic way, as a result we decided to look at an alumni engagement model.</p> <p>Working with the Alumni team we looked at various levels of engagement and tried to apply some data points to various levels, this was then developed into a system that would allow us to assign a level to each alumnus. We then used this for communication segments and a way to drive activity</p>	

	<p>in both the central DARO office and across our colleges programme.</p> <p>You should (will?) leave the session with a data model you can implement when back in your office, or at least a starting point for thinking about your own data and what might work for you.</p> <p><i>Areas covered – data cleaning, reporting, data analysis, data segmentation, RE data processing, data modelling.</i></p>	
Strategy and Planning	<p>Strategy and Planning</p> <p>Project and Change Management</p> <p>Speakers: Jude Alldred, Deputy Director (Development Services, University of Manchester and Veena Baggley, Change Management Consultant, Ignite</p>	
Systems & Information Management	<p>Systems and Information Management Track</p> <p>Business Change Management: A practical framework with examples (TBD)</p> <p>Speaker: Matt Dunne, Customer Engagement Lead, University of Oxford</p>	
15.20 – 15.30	Transit	
15.30 – 16.15	Breakout Session 7	
	<p>Mindfulness: incl. what is mindfulness, how it can help you, mindfulness at work, change resilience plus practical examples</p> <p>Speaker: Veena Bagley, Change Management Consultant, Ignite</p> <p>An interactive session exploring how we as human beings are conditioned to deal with change and what impact that has on our minds and bodies. We will look at different ways in which you can increase your personal resilience, with a focus on mindfulness and the positive effects it can bring. Through increased self-awareness of our thoughts, feelings and actions, especially in times of stress (which we often experience during change) we can cultivate a healthier response. There will be a range of experiential practices to try, including tips on how to incorporate them into daily life, which we hope you take-away and try for yourself at home and work!</p>	

	<p>Sage Advice A discussion on Development Services management skills & career progression Host: Jason Briggs, Director of Development, Cavendish Cancer Care Participants: Dev Services Leaders (TBD)</p> <p>We are fortunate that the Development Services world is full of practical lessons on databases, technology, reporting, prospect research and prospect management systems but discussion around career development and managing Development Services operations is not always covered on conference programmes.</p> <p>This session draws on the experience of seasoned Development Service leaders who will share tips and tricks on how to manage successfully, their highs and lows, tough lessons and explore role development and career progression.</p> <ul style="list-style-type: none"> • How do you get the best out of your team whatever the focus of their role? • How do you ensure you get the resources you need from your Director? • How do you move up the ladder? • Where can your role or career go? <p>All these questions and more will be explored with a broad and light-hearted panel discussion, with set questions and an opportunity for questions from the floor.</p> <p>Learning Points</p> <ol style="list-style-type: none"> 1. Tips on managing Development Services effectively 2. How to navigate the career ladder 3. General lessons from skills of seasoned leaders 	
16.15 – 16.45	<p>Conference Closing Remarks Conference Planning Committee</p>	