

# Development Operations Symposium

## Ongoing Efforts, Outstanding Results

March 8, 2018

8:30 am to 4 pm

Southwestern Oklahoma State University

Timothy T. Day Business Enterprise Center  
1121 North 7th Street  
Weatherford, OK



### Speakers

**Melody McBeth**, founder of Highland Advancement Solutions, has more than 20 years of experience in a multitude of roles in the advancement field. As principal, she provides consulting and guidance to nonprofit management teams concerning operational challenges, data standardization, change management, and best practices.

**Roxanne Thurston**, who holds Blackbaud certification in the Raiser's Edge at the professional level (bCRE-Pro), is an advancement expert who specializes in constituent relationship management technology, strategy, and implementation.

**DeWayna Hogue Pittman**, with extensive experience in donor relations and operational management, is a talented advancement professional who directs comprehensive efforts to meet nonprofit needs and donor expectations.

The logo for Highland Advancement Solutions features the word "Highland" in a large, bold, black serif font. Below it, the words "Advancement Solutions" are written in a smaller, blue, sans-serif font. A green line graph with an upward trend is positioned behind the text.

**Highland**  
Advancement Solutions

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8:30 am	<b>Registration</b> <i>Light breakfast - coffee, assorted fruit, freshly-baked muffins</i>
9 am	<b>Welcome and Symposium Kick-off</b> <i>Garrett King, SWOSU Assistant to the President &amp; Director of Institutional Advancement</i> <i>Melody McBeth, Principal, Highland Advancement Solutions</i>
9:15 am	<b>Morning Breakout Sessions</b>  <b>Gift Acceptance and Processing</b> <i>Melody McBeth</i> <b>Donor Relations Done Right</b> <i>DeWayna Hogue Pittman</i> <b>Managing Events and Engagement</b> <i>Roxanne Thurston</i>
10:15 am	<b>Morning Break</b>
10:30 am	<b>What's Next?</b> <b>Gift Acknowledgements and Follow Up Actions</b> <i>Panel Discussion</i>
12 pm	<b>Brown Bag Lunch</b> <i>Enjoy a traditional sack lunch (6" sub, chips, fruit, cookie, beverage) while conversing with old friends and making new ones...</i>
12:30 pm	<b>Keynote Presentation</b> <b>Mack Trucks and Lottery Tickets: Succession Planning is for Everyone</b> <i>Melody McBeth</i>
1 pm	<b>Afternoon Breakout Sessions</b>  <b>Add-on Tech Aids</b> <i>Roxanne Thurston</i> <b>Fundraising Leadership</b> <i>Melody McBeth and DeWayna Hogue Pittman</i>
2:30 pm	<b>Afternoon Break</b> <i>Cookies and beverages</i>
3 pm	<b>Plenary Session</b> <b>Know and Tell – KPIs and Reporting</b>
4 pm	<b>Closing Remarks</b>
4:30 pm	<b>Social Hour</b>

## Session Details

### Gift Acceptance and Processing

Who gets the hard credit? Is this really a gift? QPQ, and Benevity, and DAFs (oh my). When should your institution say no? Frequently bothersome items in gift processing are discussed and explained to help you stay compliant.

### Donor Relations Done Right

Great relationships are built when leadership and donor relations staff work together. Thanking, recognizing, and stewarding donors is integral to fundraising success and to serving those who make our mission possible. Discuss best practices and find ways to enhance your program with ideas and approaches to inspire donors.

### Managing Events and Engagement

Running successful events that make donors feel they are connected to your cause can be as easy as a tea party, but without the right tools and strategies, it could turn into the Tea Party with the Mad Hatter!

From social media outreach and finding the perfect venue to the follow up survey and results analysis, discuss the many ways to engage with alumni and encourage support.

### What's Next?

#### Gift Acknowledgements and Follow Up Actions

Prompt, personal, and powerful gift acknowledgements are vital to effective fundraising. We must ensure that donors feel appreciated and recognized for their generosity, while we accurately track pledges and gifts for reporting purposes.

Many other actions follow a visit or a gift received; enjoy this lively panel discussion on the art of acknowledgements and the finesse of the follow up!

**Highland Advancement Solutions** assists nonprofit organizations with data standardization and operational needs to fulfill their missions and serve the greater good.

HAS helps assess, mitigate, and refine fundraising operations, specializing in *The Raiser's Edge*, *Raiser's Edge NXT*, *Advance*, *Salesforce*, *Little Green Light*, and *Bloomerang*.

HAS believes in customized solutions for your organization, and is dedicated to working with you to discover what is needed and to creating a plan that will work for you to fulfill your mission.



### Keynote Presentation

*Mack Trucks and Lottery Tickets:  
Succession Planning is for Everyone*

Melody McBeth shares personal anecdotes and case studies pertaining to the need for every individual having a succession plan. Don't fail to plan!

### Add-on Tech Aids

Today's technology makes it easier to engage more donors than ever before, but the sheer number of available tools is overwhelming.

Learn to identify which tools are right for your organization and your donors without feeling like Sheldon on *The Big Bang Theory*. Online giving, email marketing, peer to peer fundraising, and much more will be discussed.

### Fundraising Leadership

Leadership directly impacts fundraising results. Good leaders connect their teams to the mission, provide resources to complete quality work and engage and inspire donors, integrate work spaces, travel the trenches, and celebrate everyone's success!

Discuss transferable tenets of good leadership and steering an outstanding fundraising operation.

### Know and Tell: KPIs and Reporting

Do you know the impact of your work? Do your donors know the impact of their giving? Learn about key performance indicators, effective and inspiring endowment reporting, and the many ways to meet and exceed the expectations of your director, your board, and your donors.

Basic tenets of a standard suite of reports are explained with guidance provided on working within your database for results.

**Southwestern Oklahoma State University**, ranked a top university in Oklahoma and a top college in the U.S., is known for its quality academic programs and its friendly service to students, alumni, and friends.



Students take classes on campuses in Weatherford and Sayre, where they may complete associate, bachelor's, master's, and doctoral degrees while attending either traditional on-campus classes or distance-learning opportunities provided through state-of-the-art technology. SWOSU is home to four academic colleges, employs more than 200 faculty members, and offers over 1,000 classes.