User Forum 2009 - Session Agenda

Development and Research

Is Your Organization Ready for Milestone 2 and Milestone 4?

Melinda Carmack, VP of Development, Earthjustice
Vanessa Andrews, Director Donor Relations, National Parks Conservation Association
Mark Grimley, Consultant, National Parks Conservation Association

First, learn how our first Milestone 2 client, United States Holocaust Memorial Museum, is implementing their solution, six months after going live. Then, learn how to best position your organization for a successful Milestone 2 or a Milestone 4 migration. What business practices should you have in place, and which ones should you be prepared to change? What are some organizational and strategic planning tips? Milestone 2 and Milestone 4 clients will discuss what precautions should be taken to effectively determine your organization's readiness to migrate.

Executive Dashboards and Key Performance Indicators in Blackbaud Enterprise CRM

Gregory Heath, Practice Manager, Blackbaud, Inc.

Learn about Blackbaud Enterprise CRM's Key Performance Indicators (KPI) and how they can be used to track organizational metrics and team fundraising progress. We'll show you examples of metrics from different organizations and how they were used to track progress over the fiscal year. We will also demonstrate the KPI and dashboard features in BBEC and show you some examples of dashboards valuable to front-line fundraisers as well as organizations' senior leadership.

Using Team Approach for Events and Volunteer Management

Jennifer Walker, Process Improvement Manager, Target Software, Inc.
Becky Mullins, Manager, Fundraising Strategic Services, International Fund for Animal Welfare
Tamara Carnes, Development Data Manager, UNC-TV

Do you have upcoming events you would like to track in Team Approach? Learn best practices in configuring your Events module, setting up your event, and tracking your event volunteers for your 2009 events and beyond.

Getting Your Constituents to Say "I Do"

Craig Zeltsar, Vice President, Client Services, Thompson Habib & Denison

Attend this session to explore the different elements of fostering a relationship with your constituents. Learn how the information you have about your constituents can help you recognize what stage of the relationship you are in and gain insight into how they may become more deeply involved in your organization. The session will also show examples of donors at various stages of their relationship, the tools to find them and program ideas to communicate with them.

Brother, Can You Spare a Million Dollars? Prospect Research in a Down Economy

David Lamb, Consultant, Target Analytics
Valerie Anastasio, Senior Consultant, The Helen Brown Group LLC

When the stock market is up and the economy is booming, nonprofits prosper with the rest of society. But when the economy turns sour and unemployment goes up, nonprofits may become concerned about how this will affect giving. Historical trends give us confidence that giving will remain strong over the long term. In the short term, there are some things that nonprofits can do to help weather the economic storm. This session will explore the prospect research and fundraising strategies that will help your nonprofit stay strong in economic hard times.

"Wonder Women":   Lasso the Power of Women's Philanthropic Giving

Katherine Swank, Consultant, Target Analytics

Generous donations from women are increasingly impacting fundraising efforts in the United States. As a group, they exhibit measurable trends and focus their philanthropy on specific objectives: key among them is making a difference on our planet.   These 'world ambassadors' seek to create new solutions, want more control over the use of their gifts and ask to be kept informed of the results from their giving. Many also seek social networks within the organizations that interest them. While it's easy to find women within your constituency, it's not as simple to identify the "Wonder Women" capable of making major and planned gifts. Targeted segmentation of your prospect pool and gender-slanted communications should be among your strategies. Armed with the information from this session you'll learn how to access and benefit from the generosity of these super heroines.

Direct Marketing

Advanced Segmentation: Getting the Most out of Your Testing Dollars

Chris Law, Senior Director, Marketing Analysis, Thompson Habib & Denison
Craig Finstad, Assistant Vice President, Direct Response Operations, American Lung Association

You have an impressive amount of data on your constituents, but how do you use this information to build a meaningful relationship? Come discover the depths to which we can dig into that data in order to advance those constituents from casual contacts to advocates. Some organizations are utilizing multivariate techniques and testing up to 16 variables at a time. Attend this session to explore the benefits of testing several communication strategies.

Blackbaud Direct Marketing Roadmap

Ellyn Ferrante, Product Line Manager, Target Software, Inc.
Gregory Heath, Senior Solutions Engineer, Blackbaud, Inc.

Blackbaud Direct Marketing (BBDM) is an integral component of the Team Approach to BBEC migration for any organization currently segmenting their constituent base. Come see what this great application can do, how easy it is to use, and how well it integrates your multi-channel fundraising efforts.

Successful Campaigns with Blackbaud Direct Marketing

Michael Sola, Director, Information Technology, Chesapeake Bay Foundation
Amelia Koch, Director of Membership, Chesapeake Bay Foundation

Come see how Blackbaud Direct Marketing (BBDM) is working for organizations like yours. Direct Marketers will show BBDM in action at organizations using Blackbaud Enterprise CRM. Stop by this session to witness the power and benefit this new tool has given direct marketers at leading organizations.

Navigating the Multi-Channel Challenge: A Donor's Perspective

Beth Isikoff, Senior Director, Business Development, Merkle, Inc.

Come hear Beth Isikoff's personal experience as a donor to six different large nonprofit organizations. Ever wonder what it feels like to be on the receiving end of what many professional marketers consider to be a well-thought out marketing strategy? Attend this session to gain a different perspective. When are organizations attempting to move someone from an online gift to an offline gift? Is treatment different based on how and with what channel I was acquired? At what point in the relationship did marketers cross channels and begin to communicate with me in a different fashion? Becoming aware of how you are perceived by others is invaluable as you plan your upcoming retention and recruitment efforts. Be a part of this interactive session, where we will share what strategies are working, and which ones aren't, in this multi-channel world.

How to Launch and Grow Successful Sustainer Programs

Steve Froehlich, Director of Development Analytics, ASPCA
Tom Gaffny, Principal, Tom Gaffny Consulting

Starting a monthly giving program may be challenging, but it can also provide your organization with a steady and reliable revenue stream, even in difficult economic times. You need to design the creative message, offer, and address all the fulfillment and operational issues. Segmentation is another important variable - inviting new prospects or converting existing donors is something every organization with a sustainer program evaluates. In this session on monthly giving, you will hear from two industry veterans who have contributed to successful sustainer programs. Join us to hear how ASPCA expanded their regular giving program and learn all the necessary aspects to consider in launching and building your own program.

Analyze- Action- Accolades

Chad Lucier, Vice President, Fundraising, LW Robbins Associates
Dana Weinstein, Director of Membership, United States Holocaust Memorial Museum

Learn how other organizations have utilized the **donor**Centrics Explorer tool to analyze their data, take action on what they've discovered, and the accolades that followed.

Executive Leadership

Donor Information: Your Most Valuable Asset

Chuck Longfield, Blackbaud Chief Scientist

Donors are your organization's most valuable asset. Without loyal supporters, your mission will be compromised at best, or unachievable at worst. One surefire way to diminish the value of this asset is to treat donors like ATM machines by taking their money for granted without making efforts to show you care about who they are. You have the means to aim higher. Donors reveal something about themselves every time they interact with you. Are you showing that you're paying attention and hearing what they are saying? Take the time to know how they should be addressed, how they want to be contacted, and what they care about. This session will help you measure the value of information; teach you to recognize and capture precious data you've overlooked, and how to maximize the value of donor information to support your mission.

What successful organizations will require from their CRM systems five years from now; and what you need to do today to start getting ready

Doug Barker, CEO, Barker & Scott
Frank Hoose, Senior Vice President, Information Technology, American Diabetes Association
Dennis Fuze, VP, Humanitarian and Corporate IT, American Red Cross

What are the key trends and technological advances that are raising the bar on what organizations expect and increasingly need from their constituent management systems to enable them to succeed? What investments are nonprofit organizations making today to prepare themselves for the next generation of CRM systems? This strategic and interactive session will leverage the experiences of leading organizations and provide attendees with valuable action items to bring back to their own organizations for consideration.

Donor First: Building Constituent Loyalty and Engagement

Jann Schultz, Director of Donor Relations, Operation Smile

Donor retention is critical for maintaining fundraising programs in the current economic downturn. Discover how Operation Smile has implemented "Donor First" strategies to effectively nurture and efficiently build long lasting relationships with constituents who financially support, volunteer and advocate for the organization. Benefits of this session include: how to develop a "Donor First" culture in your organization, learn strategies for building and training a team focused on the donor, and develop processes and procedures for enhancing donor engagement. Don't miss this chance to discuss and share methods for implementing "Donor First" at your organization!

Groundswell: Keynote session follow up

Josh Bernoff of Forrester, co-author of Groundswell

Question and Answer session with the conference Key Note Speaker, Josh Bernoff.

Online Benchmarking Lessons Learned and Raising Awareness and Revenue Through Multi-Channel Marketing

Carol Rhine, Senior Research Analyst, Target Analytics
Ettoré Rossetti, Associate Director, Internet Communications and Marketing, Save the Children

Carol Rhine will walk us through the lessons learned from Target's Online Benchmarking meetings. Ettore Rosetti will introduce us to how integrated, multi-channel marketing efforts allow non-online channels such as TV, print and radio to drive traffic to the Web for conversion: a true synergy where the whole is greater than the sum of its parts.

Internet Solutions

Managing Event Data across Chapters

Mark Davis, Vice President, Technical Sales and Support, Blackbaud, Inc.
Sarah Hall, Online Giving Specialist, Canadian Cancer Society

Does your organization have multiple chapters running annual walks, runs, or the like that are supported from the National? Do you wish that there was a more efficient way to leverage organization-wide data to get a better understanding of participant and donor behavior? There is a way! This session will explore new ways national organizations can better manage data across multiple chapters, featuring a case study from the Canadian Cancer Society British Columbia and Yukon Division.

The All-important and Ever-Changing Web site

Troy Walker, Senior Director, Technical Product Specialists, Blackbaud, Inc.
Betty Otter-Nickerson, Chief Operating Officer, Lance Armstrong Foundation

Research shows that a large majority of potential donors visit an organization's Web site before deciding to give. What does your Web site say about your organization? Is your web site helping or hindering your ability to gather online donations? Are you conveying the right message? How does your web site encourage action? This session will discuss aspects nonprofits need to consider to ensure that their web site supports the organization's strategic goals.

Online Advocacy and Fundraising: Are You Doing Everything You Can?

Cassandra Koenen, Director, Online Campaigns and Marketing, IFAW
Mark Davis, Vice President, Technical Sales and Support, Blackbaud, Inc.

For many organizations, advocacy continues to be a primary component of their overall mission. In today's technology-driven, "wired" world, advocacy and fundraising efforts are primarily practiced online. With recent advancements in hi-tech tools such as Blackberry's and iPhone's, and the extensive use of social networking by constituents, online advocacy and online fundraising can work hand-in-hand. This session will discuss ways organizations can integrate their online advocacy and online fundraising efforts with results that enhance the organization's success and further its mission.

Sphere for Public Broadcasting: A Masterful Combination

Troy Walker, Senior Director, Technical Product Specialists, Blackbaud, Inc.

While stations are great at using television and radio to drive pledges and donations online, how do you use the Internet to accomplish these goals? Luckily, there is a tool that stations can use to manage and encourage online giving – Sphere! Sphere offers one of the most robust eMarketing solutions that include enhanced web site features such as secure membership portals, e-commerce, and e-mail features to help drive online donation. Come learn how to you can use Blackbaud Sphere to enhance your online fundraising, handle pledges and premiums, and build member communities that foster loyalty and encourage participation. With the combination of Team Approach and Sphere, the possibilities are endless.

The Five New Rules for Fundraising in a Recession and Recovery

Dick McPherson, President, McPherson Associates, Inc.

When the economy gets better, things will be different. Explore strategies and techniques for using the Internet to meet your organization's short and long-term financial needs. Attend this session to discuss topics such as: the single most important change in how people use e-mail, ways of using your website to draw in big donors, important online fundraising clues that may be hidden in your data, the future of new donor acquisition, and surprising lessons from the legendary Obama fundraising machine - including their plans for that huge database.

Blackbaud Enterprise CRM and the Internet: A Look at the Future

Steve MacLaughlin, Director of Internet Solutions, Blackbaud Inc.
Ryan Frere, Product Manager, Blackbaud, Inc.

This session will showcase how Blackbaud Enterprise CRM's native Internet capabilities will provide an integrated approach for online content management, email management, online fundraising and events, community building, and leveraging social media. Current Team Approach customers will walk away with an understanding of the tools and capabilities available to them during their migration to BBEC.

Best Practices for Integrated Online Communication

Michal Heiplik, Director of Membership, Houston PBS
Vinay Bhagat, Founder and CEO, Convio, Inc.

Studies have shown that a personalized online experience coupled with traditional offline communication methods have a greater impact than when used separately. And, in this increasingly difficult economic environment, it is more important than ever to be fully integrated in your marketing efforts — but what does that mean and how is it done well? This session will provide best practices for integrating your online communications with TV, mail, phone and face-to-face efforts, along with ways to effectively staff and leverage technology to support your initiatives.

Fundraising with Social Networking Sites

Steve MacLaughlin, Director of Internet Solutions, Blackbaud Inc.

What happens when fundraising meets social networking? Which methods are most effective and why? In this session, explore exciting new opportunities for your organization to succeed with insights from Steve McLaughlin, Director of Internet Solutions at Blackbaud.

Sphere & Team Approach: Under One Roof

Ian Gruber, Blackbaud Internet Solutions
Dana Weinstein, Director of Membership, US Holocaust Memorial Museum

Here's your chance to see the progress we've made in online and offline integration since Kintera became part of the Blackbaud family. With Phase I of Blackbaud's three-phase roadmap complete (and Phase II well under way), hear how clients are successfully integrating their on-line and off-line fundraising systems, and how you can soon benefit from this new partnership too!

Team Approach Best Practices

Preparing Your Team Approach Database for Blackbaud Enterprise CRM Migration

Mark Zawistowski, Director, Business Process Improvement, Target Software

Are you excited about the coming migration to Blackbaud Enterprise CRM (BBEC)? Wondering how you can prepare your database for that migration? Interested in what others have learned from the client Milestone migrations to date? Our first clients will share some helpful tips to get you ready, and Target staff will offer initial takeaways from their early experiences.
Sustainer Maintenance and Marketing: the Next Level

Mark Zawistowski, Director, Business Process Improvement, Target Software
Jodi Scheib, Vice President of Fundraising, DMW Worldwide LLC

Sustainers are a great way to produce guaranteed revenue, cut-down on mail costs and create long-term relationships with donors. However, sustainer programs are not maintenance-free. In this session, hear a brief overview of TA sustainer functionality and learn two key ingredients for a successful sustainer program; excellent maintenance and a well thought out marketing plan. See positive results of a stepped-up QC program for maintaining the sustainers you already have and learn how moving your sustainers to an annual renewal program can help you stay on top of your program and reduce overall time spent. You'll also see an example of how a successful marketing strategy/business plan for growing your sustainer program combined with good maintenance to produce great results.

PCI Compliance…Why Do I Care?

Mark Zawistowski, Director, Business Process Improvement, Target Software
Tim McCleary, Manager, Technical Solutions, Blackbaud, Inc.

Confused by the alphabet soup of PCI DSS and PA DSS? Attend this session and learn why these compliance standards are important to you, your database, and your donors' information. Also hear about Team Approach's compliance status and efforts on the horizon that will impact your organization's database upgrades.

Automated Processes for Healthier Donor Files

Cidar Mendizabal, Project Manager, Systems, WGBH Educational Foundation
Gretchen Jerva, Senior Production Analyst, Target Software
Lisa Eggers, Consultant, Barker & Scott

Are your messages getting to the intended constituents? Are they getting them at all? Learn how proper data management can help you analyze and use your data to build your organization's programs and raise money. Acquire data hygiene strategies for management of contact addresses, telephone numbers, email addresses and more. Wondering how to get all this work done with fewer resources? Knowing what to script, and when, can help lower production costs, speed processes to completion, decrease errors, and standardize communication.

Basic Reporting 101

Jennifer Walker, Process Improvement Manager, Target Software

You have an ocean of data and reporting options in Team Approach. Where do you start and do you have the right equipment? This session will give you the tools you need to run any report that is available from the Main Menu and some tips on the best reports to start using right away. Process Improvement Manager Jennifer Walker will demonstrate key concepts to running any report, while covering account-based and revenue-based reports such as Account Profile, Account Statistics, Major Gifts, Interaction Statistics, Income Comparison and Revenue Statistics.

New Team Approach Features for Public Broadcasting

Michal Heiplik, Director of Membership, Houston PBS
Kathy Papienski, Director of Fundraising Information Systems, WETA
Joanne Shay, Director of Data Management, Membership, WMHT

Learn about some of the exciting recent enhancements that will help you and your station better manage benefits and premiums. The latest project collaboration between TASC, PBS, and Target will make pledge reporting a snap, and we'll also share insights that will save you time, money, or both.

Source Coding for the Digital Age

Michael Sharp, Director, Membership & Donor Relations, WFYI
Van Thai, System Manager, WNET

Digital TV is here now, and viewers have more viewing options than ever before. How will this affect on-air pledge tracking? Will fundraising occur on more than one channel? How are others tracking and reporting on-air activity on multiple channels? In this interactive session, we explore these questions and more as we work together to examine the best options for managing our programs in the digital age.

Team Approach Technical Topics

Emerging Infinity Platform Technology

Shaun Sullivan, Vice President, Chief Technology Officer, Blackbaud, Inc.

What is on the Horizon for Blackbaud? Interested in the state of the Infinity platform today? Want a peek at Blackbaud's technology roadmap? Join Blackbaud CTO for an inside view into the future of Infinity.

Data Security and Privacy

Marie Phelps, Database Manager, Georgia Public Broadcasting
Jake Marcinko, Manager, Information Security & Monitoring, Blackbaud

Legislative security requirements are accumulating rapidly - are you keeping up? In this session we'll explore regulatory implications on non-profit organizations, what it means to implement an information security program, and what one organization has done to prepare for compliance. Head back to work with some specific steps your organization can take toward safeguarding your donor information and achieving compliance!

Custom Integration: Expanding the Reach of Team Approach

Cindy Sinnott, Director, Data Operations, U.S. Chamber of Commerce
Dean Hill, Senior Technology Architect, The Nature Conservancy

While we have done our best to make sure Team Approach has met overall client business needs, we realize the many of you have more specific objectives. Attend this session to discover what many of your colleagues have done to extend the reach of Team Approach to meet their own specific business requirements.

Maximizing Team Approach until the Big Move

Target Software DBA Team

Although migration to Blackbaud Enterprise CRM is on the horizon, don't forget that you still need to manage Team Approach. In this session, we will discuss technical aspects to consider in helping to keep your Team Approach database running smoothly.

Milestone 2: A Technical Overview

Todd Yellin, Senior Software Developer, Target Software, Inc.
Come hear the technical details regarding the data sync to support Milestone 2 (M2) of the Team Approach roadmap. M2 leverages Blackbaud Enterprise CRM for Major Donor functionality, yet keeps Team Approach as the database of record.

Will Blackbaud Enterprise CRM be industrial strength?

Will Stansbury, VP of Technology, Target Software, Inc.
Shaun Sullivan, Chief Technology Officer, Blackbaud, Inc.

Does wondering if Blackbaud Enterprise CRM will be able to handle your upload volumes, NCOA or run duplicate detection keep you up at night, then stop by this session. We will review performance benchmarks and real time numbers for a newly implemented enterprise client. Stop by for a lively discussion.