

April 15, 2020



Virtual Resources for Advancement Professionals

Learning, Coaching, and Counsel Through This COVID-19 Crisis

www.grenzebachglier.com

Chicago Office

200 South Michigan Avenue
Suite 2100
Chicago, IL 60604

+1-312-372.4040

UK Office

180 Picadilly
London W1J 9HF
+44-(0)20.7917.1758

Overview

Virtual Resources for Advancement Professionals	2
Program Structure and Details	3
Program Fees.....	4

Virtual Workshop Series

A Selection of Current Offerings

Sustaining Your Fundraising Program Through the COVID-19 Crisis.....	5
Communicating Through the Crisis.....	6
Adapting Your Approach to Prospect Engagement	7
Crisis Response Strategic Planning.....	8
Fundraising in Academic Medicine During COVID-19.....	9
Strengthening Gift and Estate Planning in This Time of Crisis.....	10
Making Your Prospect Portfolios Actionable.....	11
Discovery During Downtown.....	12
Annual Giving and COVID-19: Keys to Continuity.....	13
Strengthening Corporate Fundraising.....	14
Using Benchmarking to Maximize Performance.....	15
Rethinking Alumni Engagement.....	16

Best Practice Coaching and Mentoring Sessions

Topical Sessions Grounded in Best Practices (1-hour sessions)	17
---	----

Thought Partnership for Advancement Leaders

Strategic Dialogue and Advice Based on Trusted Partnership (1-hour sessions)	18
--	----

GG+A Consultants

Areas of Expertise and Topics We're Prepared to Address	19
---	----

Virtual Resources for Advancement Professionals

An Unprecedented Challenge

As the COVID-19 health crisis unfolds, followed by equally daunting economic challenges, our nonprofit work will be more vital and necessary than ever before. While the philanthropic community struggles with how to proceed during this unprecedented time, GG+A is offering guidance, perspective, and proactive partnership. Drawing on 60 continuous years of philanthropic advisory leadership, our extraordinary team of colleagues is prepared to assist you in navigating this new terrain.

A New Way to Work Together

To support our nonprofit partners in the weeks and months ahead, GG+A is building a custom suite of learning and coaching packages for the remote work environment. We have designed these initiatives for a wide range of advancement professionals, including fundraising managers, gift officers, membership and alumni engagement staff, communications professionals, and advancement leaders—both to address the near-term anxieties of adapting to current circumstances and also to provide virtual opportunities for professional growth and leadership.

As detailed in the following course offerings, we have formulated an initial set of virtual workshops, designed for small groups, as well as a wide range of individual “best practice” coaching and mentoring sessions, which are designed to support advancement professionals in their day to day work. We are also offering one-on-one virtual “thought partnership” engagements specifically for Vice Presidents and AVPs. These sessions will be structured to help sustain the strength, resiliency, confidence, and capacity of your leadership during these uniquely trying times.

An Open Invitation

We are eager to partner with each of you and your institutions in all the ways we can, so we also invite you to propose specific topics to us that you do not yet see covered in this document. Our team has been hard at work building virtual session curricula, and we are prepared to tackle any challenge. We have a breadth of experience and skills across our consulting organization, and we are committed to making our expertise available to clients as this remote working environment evolves.

Three Ways of Engaging

1

Virtual Workshops for Teams

Designed for up to eight participants, these multi-part workshops address your team's most urgent challenges, with a focus on lessons learned from past challenges and novel strategies for the road ahead.

2

Individualized Coaching on Best-Practice Topics

Through tailored guidance and in-depth discussion, GG+A's one-on-one virtual coaching sessions are designed to strengthen and reinforce the professional knowledge, confidence, skills—and help raise the productivity—of staff and stakeholder partners throughout your organization.

3

Thought Partnership for Advancement Leaders

Designed specifically for senior advancement leaders, GG+A offers ongoing one-on-one virtual consulting sessions to provide feedback, ideas, direction, perspective, reassurance, navigation, and honest advice as trusted partners. We are determined to help you address the strategic, tactical, financial, operational, and personal dimensions of sustaining your advancement program amid unprecedented challenges.

Details of Our Virtual Work with Clients

- GG+A's remote engagements are structured in one-hour sessions conducted remotely by Zoom, Microsoft Teams, or other platforms that may be preferred by clients.
- We believe that our workshops are best suited for 4-8 participants; each workshop series includes pre- and post-participation surveys, which are shared with the leadership team.
- All of our workshops are designed to include one-on-one coaching for each participant, with a one-hour coaching session following each session of the workshop. We have found that such mentoring dramatically improves the impact of the group learning sessions.
- We are happy to customize any of the following sessions and series to meet your team's needs.
- Please note the comprehensive listing of our consulting professionals included in this document; some have indicated areas of particular knowledge and experience. Many of our senior-level team members provide counsel across the advancement field

Contact Us

We welcome the opportunity to work with you. Please contact us at counsel@grenzglier.com, call Lauren Haines Walerow, Assistant Vice President and Director of Business Development, at or 312.372.4040, or reach out to an individual consultant to learn more and to get started today.

Program Fees

GG+A's virtual workshops and individual coaching sessions are available in the following price ranges, which vary based on the seniority of our consulting professionals and their billing rates. Lauren Haines Walerow, Assistant Vice President and Director of Business Development, and her team will gladly work with you to build a tailored program of topics and hours to meet your needs. Reach us at counsel@grenzglier.com.

Virtual Workshop Series with One-on-One Coaching

Virtual Workshops with Individual Coaching	3-Part Workshop	4-Part Workshop	5-Part Workshop	6-Part Workshop
Cost for Workshop Sessions	\$2,100-\$3,300	\$2,500-\$4,000	\$2,900-\$4,700	\$3,300-\$5,400
Coaching for 8 Participants	\$9,600-\$16,800	\$12,800-\$22,400	\$16,000-\$28,000	\$19,200-\$33,600
Total Cost	\$11,700-\$20,100	\$15,300-\$26,400	\$18,900-\$32,700	\$22,500-\$39,000
Cost Per Participant (8)	\$1,500-\$2,500	\$2,000-\$3,300	\$2,400-\$4,100	\$2,800-\$4,900

GG+A recommends that each participant in a workshop series receive one hour of individual coaching following each workshop session. The costs shown above are based on 8 workshop participants, which is the maximum number we suggest. We will be glad to customize a coaching package for your team.

Thought Partnership and Best Practice Sessions

Individual Coaching and Counsel Sessions	One-Hour Sessions
Standard Rate for a One-Hour Session	\$400-\$700
Discounted Rate (25+ Hours)	\$380-\$665
Discounted Rate (50+ Hours)	\$360-\$630
Discounted Rate (100+ Hours)	\$340-\$595

Please note that we are pleased to offer discounted rates for contracts of 25 or more hours as illustrated above. Again, these rates vary depending on the experience and seniority of each GG+A consultant.

Five-Part Series

Sustaining Your Fundraising Program Through the COVID-19 Crisis

During this crisis, preserving the momentum and morale of your advancement team takes discipline, compassion, teamwork, and creativity. This series of workshops is designed to support development managers and frontline staff with the immediate challenges of pipeline management, financial projections, open solicitations, and prospect engagement. Facilitated by a GG+A senior consultant, each session offers a chance for your team to tackle specific aspects of the fundraising process.

Session 1 Managing Your Pipeline, Your Team, and Yourself	Disciplined management of a prospect portfolio is the foundation of successful major gift work. Even in a dramatically disrupted environment, we can continue to engage our donors—and our colleagues—with empathy, confidence, and authenticity as we work through every stage of the gift cycle.
Session 2 Staying Connected with Donors Remotely	The rapid shift to a homebound existence has made many of our routine donor engagement practices impossible. Without travel, events, and face-to-face visits, our teams have to rely on creative and alternative ways to engage individual donors, volunteer leaders, and constituencies at large.
Session 3 Qualification and Cultivation Strategies	The fundamental work of identifying a donor's capacity, values, affinity, and inclination—and aligning these with our institutional priorities—can and should continue as we engage with our constituents through this crisis. The insights we gain today will strengthen our relationships and our gift propositions tomorrow.
Session 4 Continuing Current Gift Conversations	Although times are uncertain, we need to be prepared to continue existing gift conversations with our donors. By staying in close communication, being sensitive to personal circumstances, and ensuring that our prospects are equal partners in every step of the process, we will continue to secure essential and transformative gifts.
Session 5 Donor Stewardship and Life After the Crisis	Demonstrating the tangible impact of donor support is more crucial than ever. To ensure that our donor communities stand with us through the crisis and remain committed in the future, our teams must deliver powerful, personal stewardship that speaks to all levels of supporters.

Five-Part Series

Communicating Through the Crisis

With remote-working days stretching into weeks, Advancement teams must adjust their tactics to engage stakeholders and advance the mission of their organizations through philanthropy. Donors, alumni, grateful patients, members, and friends all need to know that you care and that they matter. The desire to engage and to give has not changed; it's our approach that must adapt. Join GG+A's seasoned communications consultants for a short course on "back-to-basics" fundamentals, with insight into lessons learned from past crises and novel strategies for today's environment.

Session 1 Best Practices and Current Strategies in Crisis Communications	Crises hit every organization; it's how you respond that matters. Examples from a range of nonprofits will frame our discussion of lessons learned and how to apply them today.
Session 2 Sharpening Your Messaging	Times of crisis call for large and small changes to messaging. In this session, we will discuss how the current challenges call for honing your message and elevating your storytelling to help maximize fundraising success.
Session 3 Defining and Describing Your Impact	Donors want to know the impact of their giving, but defining impact is not always easy. We'll look at examples of compelling impact stories and statements and share a framework for how to demonstrate philanthropic impact in this crisis and beyond.
Session 4 Leaning into Annual Giving	Now is not the time to slow, or stop, your annual appeals and leadership annual giving programs. If anything, it's time to double down. We'll discuss timely, sensitive, and creative strategies for continuing—and even strengthening—your annual giving program.
Session 5 Developing Concept Papers and Gift Propositions	During both challenging times and blue-sky days, one key to inspiring giving is a proposition that is clear, compelling, and tied to an institution's vision and strategic imperatives. We'll discuss key elements of gift propositions and how concept papers can be used to clarify our thinking—and inspire our donors.

Five-Part Series

Adapting Your Approach to Prospect Engagement

In such uncertain times, experienced fundraisers need to strengthen their core capacities and prepare for their return to the field stronger than ever. Ongoing dialogue with prospects is essential; yet today's messages need to comfort, offer perspective and direction, and help make some sense of this moment. In this series, expert consultants help fundraisers become more intentional about defining their outreach plan by diving into their prospects' giving histories and honing their individual donor strategies.

Session 1

Assessing Active Prospects

With travel restrictions in place, fundraisers have a unique opportunity to thoughtfully analyze each of their assigned prospects' engagement and giving histories. Armed with this refreshed data, gift officers need to develop individual donor strategies, identifying monthly substantive interactions for each prospect over the next six to nine months.

Session 2

Employing Stewardship as Cultivation

This is an ideal time to focus on stewardship, but development officers and donor relations teams should also be positioning donors for their next gift. Staff needs to ensure that previous gifts are fulfilling the donor's intention by demonstrating the tangible and meaningful impact of philanthropic support.

Session 3

Deploying Programmatic and Volunteer Leadership

Times of uncertainty can spark rebirth, repositioning, and growth. In this session, we look at strategically redesigning engagement strategies and relationship building exercises that give programmatic and volunteer leaders meaningful roles. Learn how to help the organization weather the storm and come through the current crisis even stronger.

Session 4

Developing Mission-Driven and Relevant Gift Propositions

Gift propositions that attract major philanthropy must tell a story while articulating the specific opportunity that we want our prospects to invest in. Right now, it is crucial to review current gift opportunities, evaluate whether they need to be altered while staying true to your institution's core mission, and anticipate how these changes will impact your outreach.

Session 5

Continuing Gift Discussions in a Time of Uncertainty

Donors will continue to make gifts at the six- and seven-figure levels, though they may adjust the level and schedule of their giving. Rather than postpone solicitation conversations, we can ask donors for permission to discuss their philanthropy during this period of uncertainty. This session will arm you with a set of techniques and questions to guide these discussions.

Four-Part Series

Crisis-Response Strategic Planning

Amid the current crisis, nonprofit organizations will need to reassess their strategic planning priorities in response to a new set of competitive realities. The dynamics of the competitive market are already changing dramatically, especially as smaller community nonprofits respond to the existential threat of the pandemic by seeking “survival” philanthropic support from the same donor base. Some donors will be influenced by institutional competencies that rise to the level of COVID-19 solutions. Some donors will be influenced by non-traditional gift propositions that break through the clutter of claims of “extraordinary” needs. How can your organization address these new competitive realities—in the current moment and into the future?

Session 1

A situation analysis to identify COVID-19 influenced emerging issues

This fact-based, strategic planning tool provides client leadership with a disciplined approach to identify the myriad of ways this crisis is impacting your organization’s strategic drivers and, in turn, how these drivers are reshaping institutional priorities.

Session 2

A facilitated discussion to realign resource needs with strategic priorities

As strategic priorities are modified to respond to COVID-19, resource needs will change and so will gift propositions to support those needs. Informed by the situation analysis, institutional and advancement leadership responsible for fashioning the organization’s strategic plans will participate in a virtual group discussion to conceptualize compelling, new gift propositions.

Session 3

A facilitated discussion to identify non-traditional fundraising strategies

One emerging outcome of COVID-19 is that many nonprofits that previously viewed each other as philanthropic competitors are turning to collaborative ventures such as community-wide “Giving Days” to make public appeals. Community-based foundations are making similar appeals. Are there new strategic opportunities for clients to consider in formulating community outreach strategies?

Session 4

A facilitated discussion to address “post COVID-19” planning challenges

Unprecedented new demands impacting our client institutions will require corresponding strategic planning responses on many levels, both internally and how they interact with external stakeholders. It is not too soon to engage in discussions to frame these issues and begin modifying strategic plans to address these challenges.

Three-Part Series

Philanthropy on the Front Lines: Fundraising in Academic Medicine During COVID-19

This series supports development managers and frontline staff with the immediate challenges of fundraising for urgent COVID-19 research and patient care needs at their institution and in their communities. Facilitated by GG+A's senior consultants, each session offers a chance for your team to develop a philanthropy action plan in response to the current pandemic, with a special focus on connecting with donors who are positioned to make a substantive difference and on supporting research and healthcare heroes on the front lines.

Session 1

What does my institution need in the fight against COVID-19?

We'll identify your institution's urgent needs in research, patient care, and material support related to COVID-19 and will build a menu of tiered support opportunities from those needs. Participants will leave this session with tools for asking both donors and institutional leaders to help their community move forward. We know that donors are asking how they can help. We need to be ready to answer that question. We also need to be ready to tackle internal institutional challenges to redirecting fundraising efforts.

Session 2

How do I solicit gifts for the fight against COVID-19?

We'll discuss strategies and best practices for connecting with donors and prospects during this uncertain time. Over-the-transom opportunities for game-changing support are out there and have the potential to make a lasting difference: how do we navigate institutional barriers and other challenges to help bring in support that might be coming from unexpected directions? This is the time for gift officers to be at their best—empathic, candid, and ready to engage donors and prospects for the sake of their communities.

Session 3

How do I support my faculty/physicians during this crisis?

We'll review best stewardship practices that apply to gift officers' work with faculty/physicians during the present crisis. We'll generate specific ideas for how gift officers can provide practical and moral support to healthcare workers on the front lines at our respective institutions. This is an opportunity for gift officers to strengthen their relationships with faculty by thinking ahead. The insights we gain today will strengthen our relationships with these key leaders tomorrow.

Four-Part Series

Strengthening Gift and Estate Planning in This Time of Crisis

Planned Giving is one of the most powerful tools donors can use to make a lasting impact on the mission driving organizations they support and cherish. And yet, gift officers can be reluctant to initiate planned giving conversations due to a lack of knowledge around giving vehicles, fear of offending prospects, or appearing tone deaf to larger crises happening in the world. In this four-part series, our planned giving experts with decades of experience lead timely, virtual workshops focused on sharpening gift officers' planned giving skills in ways that honor and respect donors and advance these important relationship-building conversations.

Session 1 **Initiating Legacy** **Conversations**

Planned giving conversations often do not occur in the course of major gifts conversations, and most often it is because a major gift officer does not know how to broach the conversation and make an ask. In this session, we provide a framework for initiating planned giving discussions and the cues and clues you can look for to see if the time to have that conversation is now.

Session 2 **Planned Giving** **Vehicles**

Charitable gift plans come in many forms and vehicles, some that can provide a life income, and it is important to know the landscape of these gifts both for the health of your organization and the financial health and benefit of donors. In this session, we'll discuss the mechanics of the different charitable gift plans and how you can remove the mystery for donors by exploring tax-wise strategies that accommodate personal and family priorities.

Session 3 **Following a Prospect's** **Lead in Planned Giving** **Conversations**

Planned and legacy giving conversations require the utmost empathy and sensitivity on the part of the gift officer. Although a time of crisis may not seem like the time to ask about a planned gift, following the lead of your prospect at any time is the best approach to planned and legacy giving conversations. In this session, we'll discuss in real time how to initiate, sustain, and solicit planned gifts during a crisis and emerging from one as well.

Session 4 **Fundamentals** **of Building** **Complex Gifts**

This session addresses the use of multiple types of assets and structures to fund large-scale gift propositions. How can we introduce this topic with donors? What assets should be considered for such an approach? Where can donors find tax benefits? And crucially, how do we ensure that these complex gifts align with both our institutional needs and the donor's intended impact?

Five-Part Series

Making Your Prospect Portfolios Actionable

Major gift programs are based on managing a well-curated portfolio of prospects who have capacity and affinity for their organization. Today's fundraisers have a deluge of qualitative and quantitative data to use in creating the best portfolios. With travel and face-to-face meetings on hold for the near future, we all have an opportunity to reevaluate and improve upon our portfolio management and strategic planning. The purpose of these sessions is to help major gift programs best understand how to use what they have to maximize major gift time to work with those prospects who have the most potential.

Session 1

Data Governance: Understanding What and How to Evaluate

In order to manage major gift portfolios, Advancement offices must collect and evaluate data in the same way across the entire major gift program. This session will explore how to quantify qualitative data and use it to manage and balance major gift portfolios.

Session 2

Prospect Research vs. Prospect Management Defined

Major giving programs typically rely on prospect research to validate, segment, and vet prospects for personalized management. Today, prospect research has evolved into one of the main components under the prospect management umbrella. This session will define the differences between the two programs and clarify how each of them is essential in creating individual major gift portfolios and balancing the output across the program.

Session 3

Measuring Moves Management across Multiple Portfolios

In this session, our goal is to identify the standard metrics used to manage portfolios across multiple major gift officers and multiple portfolio types. Does your organization measure success based on time, capacity, cultivation statistics, or a combination of all three?

Session 4

Major Gift Officer Role in Portfolio Optimization

Major gift officers are at the heart of donor engagement, with responsibility for developing qualitative and quantitative cultivation plans and strategies. This session will explore the input major gift officers have into the evaluation of their portfolios and how to keep them optimized (for example, qualification and disqualification metrics, determining annual fund vs. transformational giving, etc.).

Session 5

Year in Review and Lessons Learned

Major gift officer portfolio planning does not typically include a review of the past year when strategizing for the next. This session will provide best industry practices for year-end portfolio evaluation, goal setting, and a review of what techniques and engagement strategies worked and did not work in closing gifts.

Three-Part Series

Discovery During Downtime

With our lives temporarily on pause and many solicitations on hold, there couldn't be a better time to focus on discovery work. Fundraisers aren't the only ones tethered to their home offices and laptops; many high-wealth, elusive discovery prospects in our portfolios also have time on their hands and may be more inclined to pick up a phone or respond to an email. Similarly, colleagues in prospect management and research likely have fewer immediate assignments. This may be an ideal time to bolster those internal relationships by brainstorming ways to warm up cold leads, or work with your supervisor to develop prospect strategy on disconnected or even disgruntled donors. This series explores creative and unique ways to research, reach out and meaningfully connect to new prospects.

Session 1

Proactive Research

Even with the benefit of a prospect research team, frontline fundraisers can accelerate the discovery process by understanding key research tools and strategies. Learn how build up your investigative skills, and how to find and verify important information on your prospects using your database, the web, and your own solid instincts. This is especially valuable for gift officers in programs without assigned researchers.

Session 2

Leveraging Networks

A cold call to CEO's assistant may get you nowhere. But if he uses the same accountant as your campaign chair, you might make some progress. From mastering geo-mapping to connecting the dots at the country club, this session will show you how to leverage your own network—and the networks of your volunteers, leaders, and colleagues—to help you give you an edge at getting in the door.

Session 3

Reaching Out

So now you have the home number for a top prospect. What are the first words out of your mouth to keep her on the line? If she doesn't answer, how can you craft that initial email for a good shot at getting a response? What if your colleagues have tried many times or, worse yet, you know she isn't happy with your institution? This session will help you increase your chances getting the discussion going and warming up a cold contact to secure a first-time meeting.

Three-Part Series

Using Benchmarking to Maximize Performance

Is your organization investing time and budget to participate in ongoing benchmarking such as the Voluntary Support of Education (VSE), Association of American Medical Colleges (AAMC), National Association of Cancer Center Development Officers (NACCCDO), or Woodmark Group surveys? What return are you seeing on that investment? In this series, a GG+A consultant will help your team to learn from the data already available to you through these surveys, and think about how to apply those insights to improve productivity and impact across your team.

Session 1

Selecting Meaningful Cohorts

What makes an organization a relevant peer or “aspirant peer” to yours? Fundraising success? Institutional profile or budget? Memberships in the same associations or conferences? In this session we will collaborate to use publicly available data such as Forms 990, IPEDS, or NIH Funding data to identify the institutions with fundraising programs that can serve as models to understand your own, and its opportunities for growth.

Session 2

Accessing and Normalizing Data

In our second session, we will work with the tools already available to your organization to access data from VSE, AAMC, NACCCDO, Woodmark, or other surveys. We will review the fields and periods available, determine the availability of current, historical, or “trend” data; learn how to move data from the source database into a working environment, and discuss approaches to mitigate outlier data points.

Session 3

Presenting and Interpreting Data

In our final session, we will consider different approaches to manipulating and displaying data to highlight the distinctive aspects of your program, relative to its peers and/or aspirant peers. These comparisons will reveal areas of both current high performance and future growth opportunity, turning raw data in true insights. We will discuss approaches to presenting these data to staff, leadership, and volunteer audiences to build credibility and inform strategic decision-making.

Five-Part Series

Annual Giving and COVID-19: Keys to Continuity

In good and bad economic times, annual giving forms the bedrock of successful, high-performing fundraising programs. It drives broad engagement in the mission of the institution, educates the broadest community of prospects and donors, and forms a critical pipeline into future major gifts. In this five-part series led by GG+A experts on annual giving, participants will address best practices in annual giving and how to adapt them to the evolving context of the coronavirus pandemic.

Session 1

Annual Giving in Unprecedented Times

Now is the time to reevaluate your annual giving program. This session offers the opportunity to look at what you have accomplished in your current fiscal year; evaluate programs you may need to postpone; and brainstorm new and innovative ways to close out the year.

Session 2

Annual Giving Benchmarks

Learn how your program compares to other annual giving programs nationally and internationally. Our benchmarking experts will guide you through identifying your strengths and weaknesses and how to get you to that next level of efficacy and success in your fundraising program.

Session 3

Annual Giving Strategic Planning

The most successful annual giving programs have responsive and flexible strategies that align with your organization's mission and goals while also being responsive to prospects and donors. In this session, we'll discuss best practices in strategic planning and what to watch out for throughout the year in order to remain agile in achieving your goals.

Session 4

Driving Donor Attention and Loyalty in Annual Giving

Annual giving is a crowded field with many institutions vying for our donors' attention. In this session, we'll define best practices in systematically gaining attention and ensuring donor loyalty; and provide you with concrete steps on getting more donors and keeping them.

Session 5

Annual Giving and the Digital Frontier

Annual giving involves many platforms, but by far the fastest growing form is in the online space. In this session, you will learn about the various platforms and social listening tools driving online giving, the key metrics that matter, and how you can harness them to maximize your donor support.

Five-Part Series

Strengthening Corporate Fundraising

In nonprofit advancement programs, strength in individual fundraising seldom translates directly into strength in corporate fundraising. While related, individual and corporate fundraising are distinct business and operational disciplines requiring different skillsets, metrics, and focuses. In this series, we dig into best practices related to corporate fundraising and work with participants to realign and accelerate their programs to be more effective and efficient in securing corporate philanthropic support.

Session 1

Understanding the Needs and Values of Corporate Donors

Corporations are accountable to three constituencies: their shareholders, their employees, and the public. Understanding how these three groups help shape the values, needs, and interests of corporations is instrumental in working effectively as a corporate fundraiser. In this session, participants will be able to define the needs of these three groups and begin to construct philanthropic value propositions that appeal to each constituency.

Session 2

Identifying the Right Corporate Partners

Like individuals, corporations come in many shapes, sizes, missions, and interests. An effective corporate partner for one institution might be very wrong for another. In this session, we'll present a framework for finding good partners for your institution based on mutual values, aims and mission that you'll be able to use as you look for potential philanthropic corporations.

Session 3

Building Consensus within Your Organization and

Unlike individuals, corporations are a collection of people that must come together to make decisions. Often times, there is no one decision maker, rather decisions are made by gaining influence and building consensus. In this session, participants will learn the mechanics of consensus building both within their organizations and in their corporate partners.

Session 4

Mobilizing Partners and Making Good Deals

Getting to a corporate gift agreement is one thing, getting that agreement finalized and signed is another. Much like individual fundraising, attention to detail, structure and process is key to corporate gift solicitation. In this session, participants will discuss the structure of best practice gift agreements and how to avoid pitfalls that can derail a corporate fundraising agreement.

Session 5

Impact, ROI, and Corporate Stewardship

Stewarding corporate gifts is a nuanced process that often requires careful attention an eye to publicity and messaging and a clear focus on return on investment. In this session, participants will discuss and identify the key elements needed to steward corporate gifts and setting the appropriate conditions for obtaining subsequent gifts

Five-Part Series

Rethinking Alumni Engagement

Many alumni programs are steeped in tradition and rely on routine sets of annual programs. The 2020 pandemic crisis may just be the “black swan” event that prompts change in the alumni engagement world for the better, forcing us to create community and develop affinity without the kind of human interaction we’ve relied on in the past. This is an opportunity for us to reexamine how we do business, rethink how we maximize alumni outreach, and increase the value that our alumni organizations provide the institution.

Session 1

Right Here, Right Now

As we adjust to the new normal, are we focused on the right things? What do alumni need from us during the crisis? How can we aid our institutions as they move to remote learning? How will we support the Class of 2020? This session helps alumni leaders reflect on the current moment to determine if they are making the most of the situation, including ideas for deploying staff and resources most effectively.

Session 2

Reflection, Opportunity, and Planning

How might we use this period of uncertainty to not only plan for the short and medium terms but also consider the long term? What have we learned about our work during the pandemic and how might alumni engagement fundamentally change? This session will help alumni leaders consider developing or adjusting strategic plans, alumni engagement campaigns, and metrics for the future.

Session 3

Professionalizing Webinars and LiveStreaming

As engagement goes online, many alumni organizations are scrambling to salvage programs by transitioning to livestreaming and webinars—and encountering new challenges along the way. How do we get streamed events to be as professional and successful as in-person gatherings? How do we maximize the technology to our benefit? This session looks at best practices for remote programming.

Session 4

The Board and Beyond: Engaging Volunteers

Even in normal times—with volunteers spread around the globe, urban traffic presenting travel obstacles, and limitations on our time and budgets—engaging volunteers remotely has advantages. What can we learn from the current crisis to inform what we should change for the long term? How might we increase the numbers of volunteers who are helping to advance the institution? This session focuses leaders and staff on new ways of thinking about volunteer engagement.

Session 5

Maximizing Involvement of Faculty and Staff

Alumni organizations everywhere struggle with their relevancy on campus, particularly to administrative and academic leaders. How might we use this moment to rethink our role on campus and the relationships and collaborations we have with others at our institution? This session assists alumni leaders in considering how they can elevate the value proposition of the alumni organization on campus.

One-on-One Best Practice Coaching Sessions

Through tailored guidance and in-depth discussion, GG+A's one-on-one coaching/mentoring sessions are designed to strengthen the professional knowledge, skills, and productivity of individual staff members throughout your advancement organization. We will gladly work with you to design single-focused sessions or multipart program structures—with accompanying curriculum and readings—that are right for your staff.

Best Practice Topics for Individual Coaching

- Understanding and Embracing Philanthropy
- Building Principal Gift Strategies
- Organizing Philanthropic Priorities Around Institutional Strategic Planning
- Working with Institutional Leadership
- ROI and Making the Case for Advancement Resources
- Advancement and Campaign Budgets
- Major Gift Pipeline and Portfolio Management
- Conducting Discovery During Downtime
- Your Top Three Prospects: Strengthening Strategies
- Donor Qualification and Readiness
- Compelling Cases for Support
- Communication Strategies During and After the Crisis
- Skillful Solicitation
- Structuring Complex Gifts
- Stewardship in These Challenging Times
- Designing and Implementing Virtual Events
- Sustaining and Amplifying Volunteer Engagement
- Formulating Compelling Gift Opportunities with Programmatic Partners
- Leadership Annual Giving by Zoom, Phone, Email, and Social Media
- Online Giving Tools and Techniques
- Building Grateful Patient Programs with Clinician/Scientist Partners
- Screening, HIPAA, and Database Management in Academic Medicine
- Parent and Family Member Fundraising
- Advancement Services Structures and Strategies
- Optimizing Database Management
- Integrating Services and Systems Across Advancement
- Prospect Management Metrics in the New Virtual Reality
- Developing Advancement Systems Requirements
- International Philanthropy
- Taxation and Compliance Issues
- Building Stronger Corporate Philanthropy Initiatives Across Our Campuses
- Foundation and Trust Fundraising
- Donor Advised Funds
- Strategies and Guidelines for Formulating Naming Gifts
- Strategic Alumni Outreach and Engagement: Virtual Tactics
- Donor Due Diligence and Compliance
- Managing Fundraising Boards and Volunteer Leadership Committees
- We are in the Middle of a Campaign—Now What?

Virtual Discussions: Thought Partnership for Advancement Leaders

Specifically designed for senior advancement leaders—including Vice Presidents, Assistant and Associate Vice Presidents, Alumni Directors, Communications Leaders, and Chief Development Officers—GG+A offers ongoing one-on-one counsel to provide dialogue and advice as a trusted partner. Drawing on decades of firsthand experience and wide-ranging expertise across the philanthropic sector, our consultants will help you address the strategic, tactical, financial, operational, and personal dimensions of sustaining your advancement program amid unprecedented challenges.

GG+A's thought partnership engagements are designed as one-hour sessions, which we suggest take place on a weekly, biweekly, or monthly basis with individual members of your leadership team. Please contact us to learn more about how we can support you and your organization through this evolving initiative of virtual counsel.

GG+A Consultants and Areas of Expertise

Andrew Allred

Andrew Allred, Senior Vice President, joined GG+A in 2012 bringing more than 25 years of professional experience in **development, fundraising, and management within higher education, medical, and cultural institutions.**

Andrew leads GG+A's Asia Pacific focus area which brings all of the resources of the firm to **Australia, New Zealand, and parts of Asia** as part of GG+A's heightened commitment to global practice. In addition, he also has an expansive work history in the **United States and Canada** working with his clients to build long-term fundraising success in ongoing development efforts and campaigns through consulting, coaching, and interim management positions. By specializing in a team approach, Andrew has worked with clients to create new staffing models, which in turn help them achieve greater fundraising success. He has extensive experience in the evaluation of current fundraising programs; identification of fundraising opportunities and strategies; organization of fundraising priorities; guidance of planning and execution of major campaigns; and management of all facets of a development program, including planned, principal, major, annual giving and stewardship, advancement services, and donor relations.

Andrew's wealth of experience working with complex universities and healthcare systems, as well as cultural institutions, allows him to understand each client's distinct culture of philanthropy, helping them build accelerated, sustainable fundraising programs.

Andrew has been a leader at GG+A in its **virtual practice** having delivered **gift officer trainings, one to one gift officer and management coaching, and report deliveries** over video feeds since 2016.

Before joining GG+A, Andrew was Vice President for Advancement at **Christian Brothers University (CBU)**. There, he was responsible for leading the advancement and alumni departments to establish a culture of continuous process improvement, increased engagement among constituents, and generated strategic five-year plans for the University's annual and capital campaigns. He also solicited and secured the five largest gifts in University history and led his team to a 97% increase in overall giving.

Prior to this role, Andrew served as Director of Development, **Colleges of Medicine, Nursing, and Allied Health Sciences at The University of Tennessee Health Science Center**. Andrew also held a vice president role with the American Heart Association and was a Patient Campaign Director with the National Foundation for Transplants.

Andrew is a graduate of the Executive Class and Fasttrack Classes of Leadership Memphis. He is a current member of the Association of Fundraising Professionals and the Council for Advancement and Support of Education. In addition, Andrew is a graduate of the FBI Citizens Academy. He is also an alumnus of the Memphis Business Journal's Top 40 under 40 community award.

Andrew received a Bachelor of Arts in sociology from the University of Memphis.

Areas of Expertise

Principal Gift Strategy

Major Gift Pipeline Management

Philanthropic Priorities and Institutional Alignment

Working with Leadership

Donor Readiness

Complex Gifts

Gift Solicitation

High-Impact Stewardship

Leadership and Annual Giving Program

International Philanthropy

Client List

- American Cancer Society
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Australian Antarctica Department
- Antarctic Science Foundation
- California Polytechnic State University, Pomona
- California State University Channel Islands
- Carnegie Mellon University
- Carthage College
- Case Western Reserve University
- Citrus Valley Health Partners
- Colgate University
- Drexel University
- Emanate Healthcare
- Emory University
- Harvard University Chan School of Public Health
- Hong Kong Baptist College
- Knox College
- Kutztown University Foundation
- Macquarie University
- McGill University
- Mount St. Joseph University
- Murdoch University
- New Mexico State University
- Penn Medicine Lancaster General Health
- Pennsylvania State University Milton S. Hershey Medical Center
- Pennsylvania State University
- Scripps College
- Seton Hall University
- Southeast Missouri State University
- St. Mary's College of Maryland
- Texas Children's Hospital
- The City University of New York
- The University of British Columbia
- The University of Melbourne
- The University of Mississippi
- The University of North Carolina at Chapel Hill
- The University of Queensland
- The University of Scranton
- The University of Toledo
- The University of Vermont
- University of Auckland
- University of Calgary
- University of California, San Francisco
- University of Colorado Boulder
- University of Colorado Denver
- University of Illinois at Chicago
- University of Illinois at Urbana-Champaign
- University of Minnesota
- University of Pittsburgh
- University of Toronto
- Victoria University of Wellington
- Western University
- Wichita State University Foundation

Bob Alsobrook

Bob Alsobrook, Senior Executive Vice President and Managing Director, has more than 40 years of experience leading fundraising programs and consulting with major **educational** and **medical institutions**.

Through his work, Bob has developed extensive skills in managing and directing the **development and alumni programs** of institutions while working closely with **executive cabinets, President's councils, budget and planning teams**, and **marketing teams**. Bob's professional responsibilities have included management in all areas of development as well as directing **alumni affairs** and **public relations programs**. He has also developed and executed **long-term operating plans** and **fundraising campaigns** for a wide-range of **higher education** and **healthcare institutions**.

Bob served as Senior Vice President for Institutional Advancement at **Union University in Jackson, Tennessee**, and, as Director of the university's Building a Future Campaign, significantly exceeded its goal more than one year ahead of schedule. Previously, he was Vice President for Medical Center Development and Alumni Affairs at **Tulane University** in New Orleans, where he managed medical center fundraising programs for support from all sectors and coordinated fundraising, public relations, and alumni programs for the School of Medicine, the University Hospital and Clinic, and the School of Public Health and Tropical Medicine. Prior to serving as Tulane's Vice President, he was the University's Director of Medical Center Development and Director of the Medical Center campaign.

Before joining Tulane, Bob served at the **University of Chicago** as Director of Medical Center Alumni Development and as Associate Director of Medical Center Development. In these capacities, he played a significant role in the achievement of the Medical Center's Renewal campaign. Bob has also served at the **University of Memphis** (formerly Memphis State University) in the School of Law as Assistant Dean for Administration and Assistant to the Dean, and in the office of the Vice President for Business and Finance.

He has held membership in and maintains professional associations with several national organizations concerned with fundraising, including the Association of American Medical Colleges, the National Association of Cancer Center Development Officers, and the Council for the Advancement of and Support of Education.

Bob holds a master's degree in educational administration, supervision, and economics and a bachelor's degree in economics from the University of Memphis. He completed all doctoral degree coursework and examination requirements in higher education administration and finance at the University of Memphis.

Areas of Expertise

Higher Education
Academic Medicine
Health Care
Alumni Relations
Major Gifts
Operating Plans

Client List

- AltaMed Health Services
- Ball State University
- American Cancer Society (National)
- Beth Israel Deaconess Medical Center
- The University of Arizona Foundation
- Brigham Young University
- Association of American Medical Colleges
- Bucknell University
- Buena Vista University
- The George Washington University
- California State University, San Bernardino
- Georgetown University
- University of California, Davis
- Georgetown University Medical Center
- University of California, Irvine
- Georgia Institute of Technology
- University of California, San Francisco
- The University of Georgia, Terry College of Business
- Carnegie Mellon University
- Grinnell College
- Center for Strategic and International Studies
- Hawaii Pacific University
- Chaminade-Julienne High School
- Hoag Hospital Foundation
- The University of Chicago Booth School of Business
- Howard Hospital Foundation (of Johns Hopkins Medicine)
- Children's Hospital of Philadelphia Foundation
- University of Houston Law Center
- Children's Medical Center, Dallas
- Indiana University Foundation
- Clarkson University
- University of Iowa Foundation
- Colorado School of Mines
- Iowa State University Foundation
- Columbia University Mailman School of Public Health
- Kansas City University of Medicine and Biosciences
- University of Connecticut Foundation
- Kansas State University Foundation
- Cornell University
- Keck School of Medicine of the University of Southern California
- Eastern Illinois University
- University of Kentucky
- Florida Atlantic University
- LDS Philanthropies
- University of Florida Foundation
- Louisiana State University Foundation
- University of Florida College of Pharmacy
- Loyola Marymount University
- University of Florida Health Sciences Center
- Loyola University New Orleans
- Fordham University
- Macalester College
- Fort Sanders Medical Foundation
- Mary Bird Perkins Cancer Center
- Marymount University
- Province of St. Thomas of Villanova
- McLaren Northern Michigan Foundation
- Pulmonary Fibrosis Foundation
- Michigan 4-H Foundation
- Regional One Health Foundation
- Michigan State University
- Ricks College
- University of Minnesota Institute of Technology
- Rockhurst University
- Minnesota Medical Foundation
- Rosalind Franklin University of Medicine and Science
- University of Minnesota

- Saint Thomas Health Services
- The University of Mississippi
- University of Scranton
- The University of Mississippi Foundation
- Smithsonian National Air and Space Museum
- University of Mississippi Medical Center
- University of South Carolina
- University of Missouri
- University of Southern California
- University of Missouri-Rolla
- University of Southern California, Hillel House
- National Center for Healthcare Leadership
- University of Southern California, Shoah Foundation
- University of North Carolina, Charlotte
- Southern Illinois University at Carbondale
- University of North Florida
- Southern Illinois University at Edwardsville
- North Shore-Long Island Jewish Health System Foundation
- St. Cloud State University
- University of Northern Colorado
- St. Luke's Hospital & Health Network
- Northern Illinois University
- Stephens College
- University of Northern Iowa
- Temple University
- Oregon Health and Science University
- Temple University Health System
- Oregon State University
- University of Tennessee Foundation
- Our Lady of the Lake Health Foundation
- University of Tennessee Health Science Center
- Pennington Biomedical Research Center
- The University of Texas MD Anderson Cancer Center
- University of Texas Southwestern Medical Center
- Villanova University School of Law
- Thomas Jefferson University
- Weber State University
- United States Naval Academy Foundation
- Weill Cornell Medical College
- University at Buffalo, SUNY
- World Methodist Council
- Vanderbilt University
- Wright State University
- Vanderbilt University Medical Center
- Yale University School of Medicine
- University of Vermont
- Yale-New Haven Hospital
- Villanova University

Debbie Anglin

Debbie Anglin, Consulting Vice President, joined GG+A in 2004, and brings to the firm **more than 36 years of professional experience** in information technology, systems development, and advancement services administration.

Debbie is a successful team leader, leading cross functional teams in the development of practical and sustainable information technology solutions to support all aspects of fundraising programs and operations. Debbie's work with our clients includes evaluation of advancement operations, systems, and reporting solutions. During system implementations, Debbie has worked with clients to **develop data structures and data capture solutions** that allow our clients to monitor key metrics on how their programs are performing. Having an IT background gives Debbie the **ability to work with information technology professionals** translating the business requirements into technical specifications. With Debbie's guidance, clients have **experienced great gains in staff efficiency and better staff utilization** from the automation of intensive manual processes.

Debbie retired from her position as the **Executive Director of Central Development Services at the University of California, San Francisco**. There, she led the Development Services teams, which included Prospect Development, Annual and Special Giving, Information Systems, and Technology and Gift Administration.

Previously, Debbie served as **Director of Information Strategy for the Office of Development at the University of California, Santa Barbara**. In this role, she led a large-scale client/server system implementation and managed the development of system specifications, quality assurance testing, system deployment, system support, and documentation. Using DonorScape wealth screening data, Debbie **designed data mining processes** to uncover new high value prospect to build the campaign pipeline. She also provided strategic analysis on campaign and fundraising progress toward goals.

Debbie is a member of the **Council for Advancement and Support of Education and the Association of Professional Researchers for Advancement**. She has presented on best practices in Advancement Services at both CASE and the Association of Advancement Services Professionals.

Client List

- American University
- California Institute of the Arts
- California Polytechnic State University, Pomona
- Case Western Reserve University
- Children's Hospital of Philadelphia
- City of Hope National Medical Center
- Duke Health
- Emory University
- Free Library of Philadelphia
- Georgetown University
- Indiana University

- Indianapolis Museum of Art
- James Madison University
- Kansas State University Foundation
- Lehigh University
- Mercersburg Academy
- Oregon Health and Science University Foundation
- Oregon State University Foundation
- Pitzer College
- Rensselaer Polytechnic Institute
- St. Cloud State University
- Stanford University
- The University of Texas Southwestern Medical Center
- The University of Queensland
- University of California, Los Angeles
- University of California, San Francisco
- University of Nebraska
- University of Notre Dame
- University of Oregon
- University of Southern California
- University of Toronto
- Vanderbilt University
- Vanderbilt University Medical Center
- Western Michigan University
- Yale University

Richard Banks

Richard Banks, Consulting Vice President, brings to the firm **nearly 30 years of senior management experience in advancement**, with specialized expertise in strategic planning at the organizational level.

Rick's collaborative approach to strategic planning is grounded in an understanding of effective methods for partnerships among universities' executive and academic leadership. Through his distinguished career, he has developed an **expansive knowledge of all disciplines of advancement services** and operations, including process design, policy and procedures, and system decisions and implementation projects, as well as donor relations and events management.

His background further includes resource planning, organizational design, financing approaches, and change management. His breadth of knowledge of business intelligence functions has led to expertise in developing robust reporting strategies and improved digital approaches for alumni engagement. Rick retired in September 2016 from his position as the Associate Vice President, Alumni Affairs and Development Administration, for **Cornell University**.

As a principle organizer and planner of strategic direction for Cornell for over 20 years, he was responsible for directing and executing administrative operations and strategic and campaign planning in support of the University's fundraising and alumni engagement programs, including the **successful \$6.3 billion Cornell Now campaign**. His role also included serving as the senior finance officer and senior administrative officer for the division, wherein he was responsible for managing human resources, advancement services, budget, planning, finance, information technologies, and business intelligence programs.

Rick previously served as Director of Alumni Affairs and Development Services and Deputy Director of University Development at Cornell. He also held the position of Director of Business Operations for Cornell's Division of Public Affairs. Prior to joining Alumni Affairs and Development, he worked for eleven years in the Cornell University Controller's Office, including serving as University Bursar. Additionally, Rick was part of the team that provided design specifications to PeopleSoft for the development of the Contributor Relations product, and he was the Project Director for the implementation of Contributor Relations at Cornell from 2002 to 2003.

Rick's volunteer service includes serving as a member of the Cornell Class of 1972 Class Council and, since January 2012, as a board member for the Community Foundation of Tompkins County, New York. In August 2016, he was elected to the Board of Directors of the Beta Theta Pi Foundation.

Areas of Expertise

- Advancement Function Integration
- Advancement Services Administration
- Assessment of Campaign Readiness and Feasibility
- Campaign Planning
- Client Service
- Human Resources Management
- Information Technology and Reporting
- Strategic Planning

Client List

- American Associates of Ben Gurion University of the Negev
- Brown University
- University of Colorado
- Johns Hopkins University
- Smithsonian Institution
- University of South Florida
- Council for Advancement and Support of Education (CASE)

Chris Begley

Chris Begley, Senior Vice President, has spent her career advancing prestigious arts institutions, including **The Metropolitan Museum of Art** and the **American Academy in Rome**. Chris joined GG+A to bring her deep museum experience to a wide variety of arts and culture clients.

She enjoys collaborating with clients to find solutions to their biggest challenges and brings particular expertise in **program analysis, strategic positioning, identifying opportunities and strategies for growth, and program creation**. Chris also works with a range of clients to develop communications that position them for success with donors. Her work with clients includes **institutional visioning and strategic priority setting; developing white papers, proposals, and gift propositions; and crafting inspirational messaging for case statements and annual appeals**.

Before joining GG+A, Chris spent three years as the Vice President of Development at the American Academy in Rome, where she oversaw all aspects of fundraising in the United States and in Italy. Prior to joining the American Academy in Rome, Chris enjoyed a seventeen-year career at **The Metropolitan Museum of Art**, at which she occupied a full range of positions. Throughout her career there, Chris was responsible for writing materials on diverse issues for the Museum, including four case statements and public responses to critical events. As Senior Deputy Chief Development Officer for Government and Foundation Giving, she provided strategic vision, leadership, and coordination for all fundraising efforts, and managed over \$20 million in grants annually. Prior to this role, she served as **Senior Development Officer for Individual Giving and Departmental Communications**, managing prospects and Major Gifts staff, while developing all campaign fundraising materials for the museum's \$900 million capital campaign.

While at the Metropolitan, Chris developed new fundraising initiatives; collaborated with staff throughout the Museum on the analysis of education, conservation, and technology programs; and created the framework for such major initiatives as the **Global Museum Leaders Colloquium** and the **Leonard A. Lauder Research Center for Modern Art**. Chris holds a Master of Arts in Art History from Syracuse University, where she studied Italian Renaissance Art. She earned a Bachelor of Arts in Art History from the University of Texas at Austin with an additional year of independent study at the University of Rome. In 2003, Chris provided research assistance to curator Carmen C. Bambach for the Metropolitan Museum exhibition "Leonardo da Vinci, Master Draftsman."

Chris remains active in the museum field and recently authored the updated guidelines on fundraising for the Association of Art Museum Curators Handbook and is a member of the **American Alliance of Museums**. She is a member of the Teaneck Garden Club and a volunteer for Pony Power Therapies in Mahwah, NJ, an organization dedicated to providing special needs and under-served children and adults a unique opportunity to ride, care for, and interact with horses. She served on the board from 2011-2014

Areas of Expertise

Arts and Culture
Strategic Communications
Case for Support
Development Program Review, Campaign Assessment
Program Analysis
Strategic Positioning
Program Creation

Client List

- California Academy of Sciences
- Da Vinci Science Center
- Emory University
- Englewood Health
- ESADE
- IE University
- IESE
- Fourth Presbyterian Church
- J. Paul Getty Trust
- Lyric Opera of Chicago
- MAG America
- Milwaukee Art Museum
- Mount Allison University
- New York Botanical Gardens Oakland Museum of California
- Stone Barns Center for Food and Agriculture
- Tate
- WAMU American University Radio
- Westtown School
- Yeshiva University

Carey Bloomfield

Carey Bloomfield, Senior Consulting Vice President, brings to the firm more than 25 years of professional experience in development and fundraising with **higher education, independent schools, and cultural institutions.**

Carey works with clients to build fundraising success in **campaigns** and in ongoing development efforts. She has extensive experience in evaluating current advancement programs; identifying **opportunities and strategies for growth**; organizing **fundraising priorities**; guiding the **planning and execution of major campaigns**; and managing all facets of advancement programs, including **principal and major gifts, planned giving, annual giving, alumni relations, and donor relations.** Her extensive fundraising and consulting experience make her particularly qualified to understand the distinct culture and opportunities at a wide range of institutions, from complex **public university systems to private colleges**, independent schools, and cultural institutions.

Before joining GG+A, Carey served as Director of Development for the **Boston Symphony Orchestra** (BSO), where she helped complete a comprehensive campaign in 2000 with a total of \$150 million in contributions, surpassing the campaign goal by \$20 million. Prior to this role, Carey served as Chief Advancement Officer at **Smith College**, growing gift receipts from \$26.8 million to \$46 million between 1995 and 1998.

She also has more than 10 years of development experience at **Harvard University**, serving as Assistant Dean, Chief of External Relations for **Harvard Business School**, and previously as the Business School's Director of External Relations. Previously, Carey also served as Associate Director for the **World Affairs Council of Boston** and as Assistant Director of the American Issues Forum Project with the **World Affairs Council of Northern California.**

Carey is a member of the Association of Fundraising Professionals (AFP), the Council for Advancement and Support of Education (CASE), Women in Development, and The Friday Forum. She was President of Group I Directors of Development, League of American Orchestras, and is a Trustee of the Dana Hall School and President of the Board of Trustees of the Episcopal Chaplaincy at Harvard. Carey received her bachelor's degree in French literature, studying at Brown University and graduating Phi Beta Kappa from the University of Rochester. She also studied French literature in the master's program at the University of California, Berkeley.

Areas of Expertise

- Higher Education
- Independent Schools
- Cultural Institutions
- Strategies for Growth
- Planning and Execution of Major Campaigns
- Principal and Major Gifts
- Planned Giving
- Annual Giving
- Alumni Relations
- Donor Relations

Client List

- University of Alberta
- Center for Strategic and International Studies
- Albright College
- University of Chicago
- American Committee for Weizmann Institute of Science
- University of Chicago Medical Center
- American Enterprise Institute
- Children's Hospital of Philadelphia
- The Asia Society
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Atlanta Ballet
- Children's Museum of Indianapolis
- The Blake School
- Christ School
- Boys & Girls Clubs of Boston
- The City University of New York
- University of British Columbia
- Columbia University Medical Center
- University of British Columbia, Sauder School of Business
- Concordia University
- Bryant University
- Dalhousie University
- Bryn Mawr College
- Dana Hall School
- Bryn Mawr School
- Eisenhower Fellowships
- Buckingham Browne & Nichols School
- Elon University
- Bucknell University
- Emerson College
- Cambridge School of Weston
- Emory University
- Carnegie Museums of Pittsburgh
- Emory University School of Law
- Carthage College
- The Explorer's Club
- Case Western Reserve University
- Florida West Coast Symphony
- Catholic Charities of the Archdiocese of New York
- Fordham University
- Celebrity Series of Boston
- Free Library of Philadelphia
- The George Washington University
- University of Minnesota Foundation
- Georgetown University Georgia State University
- Missouri Botanical Garden
- University of Georgia Terry College of Business
- Missouri State University
- University of Georgia School of Law
- Mount St. Joseph University
- Global Fund for Women
- National Arts Centre of Canada
- Goucher College
- National Public Radio
- Greenwich Country Day School
- National Trust for Scotland
- Haverford College
- New World Symphony
- Horace Mann School
- New York Philharmonic
- The Hotchkiss School
- New York University Stern School of Business
- The Jackson Laboratory
- Newton Country Day School
- Kenyon College
- Orchard House
- Kingswood-Oxford School
- The Pennsylvania State University Smeal College of Business
- La Salle University
- University of Pennsylvania

- Louisiana State University Ourso College of Business
- Philadelphia Orchestra
- Louisiana State University Foundation
- Providence College
- Lyric Opera of Chicago
- Rensselaer Polytechnic Institute
- St. Mary's College of Maryland
- The Richard Ivey School of Business
- Massachusetts Audubon Society
- The Richard Stockton College of New Jersey
- University of Massachusetts, Amherst
- Rockport Music
- Massachusetts Institute of Technology
- St. Paul's School (Maryland)
- Mercersburg Academy
- The Salk Institute for Biological Studies
- Miami University
- San Francisco Symphony
- Sarasota Orchestra
- University of Vermont
- Seton Hall University
- Villanova University
- Shepherd University
- University of Virginia Darden School Foundation
- Shipley School
- Wheaton College (Norton, Mass.)
- Stratford Shakespeare Festival
- William Penn Charter School
- Sterling and Francine Clark Art Institute
- Whitney Museum of American Art
- The Summit Country Day School
- The Winsor School
- Tufts Medical Center
- The World Federation of United Nations Association
- United Way of Greater Cincinnati
- United Way of Miami-Dade

Keith Brant

Keith E. Brant, Consulting Vice President, has led advancement teams at distinguished higher education institutions for more than 30 years in all areas of advancement including **development, alumni engagement, marketing, advocacy, special events, and advancement services**. He has created strategy for major ambitious **campaigns** that have exceeded goals, directed programs through **transitions**, and led efforts to enhance the **technology and systems of advancement programs**.

As the **Vice Chancellor, University Relations** at the **University of California, Santa Cruz**, he directed a team of 110 professionals across all areas of advancement and executed programs including the completion of the University's first Campaign for UC Santa Cruz, which exceeded its \$300 million goal by \$35 million. Under his leadership, the Campaign engaged more than 63,000 donors, doubling both the number of endowed faculty chairs and the size of the campus endowment.

At **Saint Mary's College of California**, he served as the Vice President, Development, where he oversaw a team of 35 alumni, development and advancement professionals and served as a member of the President's cabinet. He elevated the University's fundraising and initiated new volunteer and alumni engagement opportunities.

Keith served as the Vice Chancellor for external relations for the **University of California, San Diego**, where he headed the offices of development, communications and marketing, alumni relations, advocacy, information technology, finance and special events. In this role, he oversaw fundraising during the final phase of a **\$1 billion comprehensive campaign**, and launched a **comprehensive review of the alumni relations program**, resulting in a plan to expand and decentralize alumni engagement throughout the campus.

As Executive Director of the **UCLA** Alumni Association, Keith provided strategic advice and counsel to the chancellor, provost, vice chancellors, deans, and campus community on alumni relations. Serving as one of eight direct reports to the Vice Chancellor, he provided leadership and vision to a department with 550 employees and a \$41 million budget. He was the spokesperson for one of the nation's largest and most diverse associations, led all association programs and communications, and collaborated with colleagues on **donor stewardship, fundraising** and **prospect management** for Campaign UCLA.

Keith earned his B.A. in Film & Television, M.A. in Higher Education, and Ph.D., Higher Education, from the University of California, Los Angeles.

Areas of Expertise

Higher Education
Alumni Engagement
Marketing, Advocacy
Special Events
Advancement Services
Donor Stewardship
Prospect Management

Daniela Broderick

Daniela Broderick, Consulting Associate, brings to the firm more than 12 years of experience in higher education, and works with clients in the Executive Practice, Academic Medicine, and Advanced Analytics practice areas. Daniela has analyzed and presented GG+A's **DonorScape predictive modeling** findings, **portfolio analysis**, and **valuation of prospect pools** ranging from 20,000 to 2.5 million records, in order to inform **prospect pipelines** and maximize **gift officers' productivity**.

Prior to her current position, Daniela served as **chief of staff** to CEO John Glier, coordinating all communications from the executive office and serving clients ranging from the Lyric Opera of Chicago to the Yale Cancer Center. Prior to GG+A, Daniela served as the Chair of Joliet Junior College (JJC)'s Fine Arts Department, a multi-disciplinary unit that offers courses in **Music, Art, Theatre, Communications**, and **Interior Design**. In that capacity, she managed a staff of over 45 faculty and coordinators, and about 2,500 students per semester. She wrote **departmental strategic plans**, **led the development of the Music Technology and Graphic Design certificate programs**.

Daniela was a tenured Professor of Music at JJC for nearly a decade. Among other accomplishments in that role, she initiated a successful **fundraising campaign** to purchase a Steinway grand piano for the JJC Fine Arts Theatre, and served as artistic director for the Musica Viva series.

While pursuing her MBA at the University of Chicago Booth School of Business, Daniela was Vice President of Careers for the Booth Social Impact Club, and received the Dean's Prize for Building the Chicago Booth Brand, and the Diversity Award. While taking the A.T. Kearney/Chicago Booth Strategy Lab course, she helped to devise a new product marketing strategy for an early-stage telemedicine company. She also led a team as project manager in the New Products and Services Lab on the development of a new endurance product concept for a leading performance nutrition group.

Daniela holds an MBA from the University of Chicago Booth School of Business, a Doctor of Musical Arts in Piano Performance and Literature from the University of Illinois at Urbana-Champaign, a Master of Music in Piano Performance from the University of Colorado, and a Bachelor of Music in Piano Performance from the Rio de Janeiro Federal University in Brazil.

She is also an active pianist, having performed with groups such as the Orion Ensemble, Rio de Janeiro Federal University Orchestra, Metropolitan Youth Symphony Orchestra, and Lewis University Quintet.

Areas of Expertise

Prospect Management
Moves Management
Internal Assessment Studies
Campaign Readiness Studies
Strategic Planning Studies

Client list

- Catholic Extension
- Charlotte Country Day School
- Clark Art Institute
- Colgate University
- Dana-Farber Cancer Institute
- Englewood Health
- Fourth Presbyterian Church
- Macalester College
- Mary Bird Perkins Cancer Center
- Montgomery College
- Nova Southeastern University
- Pacific Symphony
- Pew Charitable Trust
- Polytechnic School
- Rice University
- Southeast Missouri State University
- Tec de Monterrey
- UCLA Jonsson Cancer Center Foundation
- UMass Amherst
- University of Baltimore
- University of New Mexico Foundation
- University of Wisconsin Foundation
- Western Kentucky University
- The Wistar Institute

Pamela Buell

Pamela Buell, Consulting Vice President, brings more than 30 years of experience in **fundraising and management** in **higher education** and **healthcare institutions**.

Pamela's most recent experience as Associate Vice Chancellor of Medical Alumni & Development for **Washington University in St. Louis** resulted in achieving \$1 billion toward the University's \$2.2 billion campaign. Under her leadership, fundraising results for the School more than doubled in less than three years. During her tenure, a **grateful patient fundraising program** was implemented, scholarship support more than quadrupled, and a **signature stewardship program** was created.

Prior to this role, Pamela was Executive Director of Principal Gifts for **The Johns Hopkins University** for eight years. She directed the University's largest fundraising program for donors making gifts of \$5 million and above and oversaw the stewardship of donors making gifts of \$10 million and above. Throughout two **multibillion-dollar campaigns**, she collaborated with colleagues and institutional leadership to design **unique proposals** resulting in **naming gifts** for buildings and **endowed academic programs**, with an emphasis on **medicine**. In this role, she also staffed the University's trustee **Principal Gifts Committee**.

Previously, she served as Director of Leadership Gifts and Regional Programs for The **Pennsylvania State University**, where she directed strategy development for \$1 million and greater prospects and oversaw a 100% participation of the Board of Trustees in the Grand Destiny campaign.

Pamela has also held senior development director positions at the **Indiana University Foundation** as well as **The Indiana University Art Museum** and worked with Directors of the **IU Foundation** and Trustees of the University.

Pamela has led and participated in numerous panels for the Council for Advancement and Support of Education (CASE) throughout her career, has been active in the Association of American Medical Colleges-Group on Institutional Advancement (AAMC-GIA), and has been a member of the Development Leadership Committee of the Association of American Medical Colleges (AAMC).

Pamela holds a bachelor's degree and two master's degrees from Indiana University with an emphasis on art history and business. She is a graduate of the National Planned Giving Institute with certificates in Charitable Gift and Estate Planning and Plans of Giving.

Areas of Expertise

Academic Medicine
Healthcare
Higher Education
Arts and Culture
Grateful Patients
Stewardship
Principal and Major Gifts

Client list

- Carnegie Mellon University
- Dartmouth College
- Houston Methodist Hospital Foundation
- Rush University Medical Center
- University of Chicago
- Sheppard Pratt Health System
- McGill University Health Centre
- UCLA Health Sciences

Ed Caron

Ed Caron, Consulting Vice President, brings to the firm extensive experience in **strategic and crisis communications, strategic planning, public policy, and partnership development.**

Prior to joining GG+A, Ed served **Providence College** for 20 years as Vice President, College Relations & Planning. There, he held cabinet-level responsibilities for **strategic planning, strategic communications, and public affairs.** He also served as the College's first secretariat, providing senior staff support to the Providence College Board of Trustees.

While at Providence, Ed directed a team that secured a \$5 million competitive grant to establish the nation's first undergraduate degree in public and community service. He also secured for Providence College, in collaboration with the **University of Notre Dame**, teaching and service fellowships for graduate education majors to serve as faculty in disadvantaged, urban schools throughout New England.

In addition, Ed has provided consultation services to a number of Providence College partners in the private and quasi-public sector, including the Board of Directors and staff of the **Greater Providence Chamber of Commerce, Rhode Island Foundation, Providence Foundation, Pawtucket Foundation, and Leadership Rhode Island.** He has provided similar consulting assistance for board and senior staff retreats for Rhode Island government agencies, law firms, public relations and marketing agencies, and national tourism organizations.

Ed is founder and president of the **Changing Minds and Hearts Education Foundation**, which provides financial support for **TalkWorks**, a character education initiative established in 2001 to combat bullying and teasing in Rhode Island and Massachusetts elementary and middle schools.

Prior to his appointment at Providence College, Ed worked as a managing consultant with **Telesis, Inc.**, an international **business strategy and public policy consulting firm.** He also served as vice president for public affairs at **Blue Cross and Blue Shield of Rhode Island** and chief of staff to two Rhode Island attorneys general.

Among his community affiliations, Ed is a member of the Bradley Hospital Foundation Board of Governors, a national leader in pediatric and adolescent mental health. He is also a former member of the board of directors of the San Miguel School, the original Christian Brother model middle school for disadvantaged immigrant students now replicated in 15 states nationally.

Ed earned his undergraduate degree at Providence College and completed studies at the Harvard University Graduate School of Education Institute for Educational Leadership.

Areas of Expertise

Higher Education
Strategic and Crisis Communications
Strategic Planning
Public Policy
Partnership Development
Gift Propositions

Client list

- University of Calgary
- The University of Chicago
- The University of Chicago Booth School of Business
- California State Polytechnic University, Pomona
- Carnegie Library of Pittsburgh
- Carnegie Mellon University
- Children's Hospital of Philadelphia
- Concordia University, Montréal
- Curtis Institute of Music
- Drexel University
- Georgia State University
- The Johns Hopkins University
- La Salle University
- Louisiana Tech University
- Marymount University
- Montgomery College
- New Mexico State University
- Nova Southeastern University
- Pennsylvania Horticultural Society
- Philadelphia Museum of Art
- Region One Health (Memphis)
- Rush University Medical Center
- Saint Joseph's University
- University of San Diego
- Seton Hall University
- University of Southampton (England)
- Temple University Health System
- United Nations High Commissioner for Refugees
- Villanova University
- Wichita State University
- University of Nevada, Reno
- University of North Carolina at Chapel Hill

Melinda Church

Melinda Church leads the firm's **Strategic Communications** practice area. She is accomplished in accelerating the mission of others by growing revenue and positioning of organizations and large-scale change initiatives.

Since joining GG+A, she has partnered with more than seven dozen clients to **accelerate their mission-driven goals**, grow their philanthropic support, and elevate their reputation. Her work with clients includes **philanthropic priority setting; case and proposal development; organizational structures, development, and planning; issue mitigation; and new leader coaching**; among other activities.

Before joining GG+A in 2016, Melinda served in numerous leadership positions in higher education at the **University of Virginia and The Ohio State University**, among other colleges and universities. At U.Va, she worked for President John Casteen during public higher education's **first billion-dollar campaign**. Much of her work there involved institutional **and executive positioning, speech writing, and case and proposal writing**.

As Vice President of University Communications and Marketing at Ohio State, Melinda oversaw the full range of marketing, branding, communications, and public relations functions. She **developed the University's first unified visual identity**, led communications strategy for corporate affinity partnerships that generated more than \$500 million, and led successful mitigation strategies for issues that presented significant challenges to institutional reputation. As Vice President, Advancement Integration and Communications, she worked with deans and others to develop concepts, white papers, and proposals for eight- and nine-figure gifts; create optimal structures for fundraising communications across the institution; and conceive engaging events for volunteer leaders.

Melinda served as Executive Officer to the President of Ohio State, **leading the operations of the President's Office**, special events, the University Residence, and executive communications. To maximize the effectiveness of the University's senior leadership team, she developed and led a new approach to planning and staging the implementation of major institution-wide initiatives. She planned international travel to grow higher education and business partnerships, and she served as a University delegate throughout China, Turkey, India, Iceland, Europe, and the United Kingdom. She conceived and executed the 2012 opening events for Ohio State's Gateway Office in Mumbai.

Melinda has served in **philanthropic and alumni communications roles** at Washington and Lee University and Virginia Military Institute. She taught expository writing at Harford County Community College. Prior to her work in higher education, she was managing editor of Indiana Business magazine. Melinda has edited and designed several academic and general-audience books. She is an award-winning writer, artist, designer, and silversmith.

Melinda holds a master's degree in science and health journalism from Indiana University and a bachelor's degree in English (creative writing) from the University of Washington.

Areas of Expertise

Strategic Communications
Strategic communications
Philanthropic Priority Setting
Case and Proposal Development
Organizational Structures, Development and Planning
Issue Mitigation
New Leader Coaching

Client list

- Albright College
- American University
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Art Institute of Chicago
- Barack Obama Foundation
- Bucknell University
- Canadian Institute for Advanced Research
- Carnegie Mellon University
- Charlotte Latin School
- Cincinnati Museum Center
- Colgate University
- Columbia University Mailman School of Public Health
- Columbus Foundation
- Columbus Ideas
- Concordia University
- Curtis Institute of Music
- Dartmouth College
- Doheny Eye Institute
- Emory University
- Florida Atlantic University
- George Fox University
- Germantown Friends School
- Greenhill School
- Hawaii Pacific University
- Hobart and William Smith Colleges
- Hood College
- Institute of Ophthalmology Basel
- International School of Indiana
- Kenyon College
- King's College London
- Kutztown University
- Louisiana State University
- Lucile Packard Foundation for Children's Health
- Lyric Opera of Chicago
- McGill University
- Mount Allison University
- National Cathedral School
- The Ohio State University
- The Ohio State University Wexner Medical Center
- Oregon State University
- Pennsylvania State University
- Polytechnic School
- Pomona College
- Pratt Institute
- Purdue University
- Rodale Institute
- Rush University Medical Center
- Sarasota Orchestra
- Sheppard Pratt Health System
- Siemer Institute
- Simon Fraser University
- Smithsonian Institution
- Tecnologico de Monterrey
- Temple University College of Public Health
- Tuerk House
- University of British Columbia
- University of Calgary
- University of California, Berkeley School of Law
- University of Cambridge

- The University of Chicago Medicine
- University of Dayton
- University of Denver
- University of Kansas Endowment
- University of Maryland Medical Center
- University of Massachusetts Amherst
- University of Melbourne, Medicine, Dentistry & Health Sciences
- University of Missouri
- University of North Carolina at Greensboro
- University of Pennsylvania Museum
- University of Pennsylvania School of Nursing
- University of Queensland
- University of Rochester
- The University of Toledo
- University of Toronto
- University of Toronto Faculty of Arts and Science
- University of Virginia
- University of Virginia Curry School of Education
- University of Virginia Darden School of Business
- University of Waterloo
- University of Wisconsin Foundation
- University of Wisconsin Medicine
- UT Health
- Upper Canada College
- Westtown School
- Yale Cancer Center

Megan Collier

Megan Collier is a Consulting Associate and lead data analyst in the GG+A SurveyLab, with **expertise in both qualitative and quantitative research and methodology.**

Since joining GG+A, she has partnered with clients across nonprofit sectors to help them gather information directly from key stakeholders and **realize data-driven outcomes.** Megan has extensive experience conducting survey and focus group research with a variety of populations, synthesizing complex data, and illuminating key findings and themes as **actionable insights for clients.**

She has conducted surveys across a range of topics – building constituent connection, donor experiences and motivation, **tracking longitudinal changes and cohort segmentation,** message testing and constituent awareness of programs, and many other subjects.

Prior to GG+A, Megan was trained in academic-quality research methods and earned a Master of Arts in sociology from **University of Illinois at Chicago (UIC).** During this time she analyzed survey data on civic participation and police contact as part of the Chicago Area Study research project. She also conducted several qualitative studies, including an extensive interview study with transgender and gender variant populations, and interviews on neighborhood, school choice, and race in the Chicago area.

Megan's work has been published in the journals **Social Currents and Sociology Compass,** and she has presented her research at multiple conferences, including the American Sociological Association's Annual Meeting.

Megan holds a Bachelor of Arts in sociology from Guilford College and a Master of Arts in sociology from UIC.

Areas of Expertise

Data Analysis
Qualitative and Quantitative Research
Survey Methods and Methodology
Focus Group and Interview Methods and Methodology
Client Communications

Client list

- Boston College
- Dartmouth College
- Sidwell Friends School
- The Kinkaid School
- University of Melbourne
- Stevens Institute of Technology
- Mary Baldwin University
- University of Denver
- Colgate University
- Stanford University School of Engineering
- Virginia Tech
- Syracuse University
- National Portrait Gallery
- Sarasota Orchestra

Marcia Crawley

Marcia Crawley, Consulting Vice President, brings over 23 years of experience to the firm in a variety of fields, including **journalism, communications, and advancement**. She has led and supported fundraising operations at **higher education institutions** and **arts and cultural museums**.

Prior to joining GG+A, Marcia held chief development positions in two museums, serving as Vice President of Advancement and Community Engagement at the **Carnegie Museums of Pittsburgh** and as Vice President of Development at the **Detroit Institute of Arts**.

Prior to these roles, Marcia spent six years in positions of increasing responsibility at **Michigan State University (MSU)**, where she joined the Spartan team as Director of Development for the **Eli and Edythe Broad Art Museum**. In lead-up to the Museum's opening, Marcia was responsible for the successful completion of the Museum's \$45 million dollar building campaign. As the Museum began its operations, she worked to create and implement strategy and functions necessary for successful.

Museum operations, which included **strategic planning, board building and management, budgeting, marketing and communications, membership, grants, sponsorship, events, and planned giving**.

Marcia also worked as the Senior Director of Regional Development at Michigan State University (MSU). She led a team responsible for strategic prospect management, outreach, and funding efforts in the eastern United States during the University's successful \$1.5 billion Empower Extraordinary campaign. Early in her career, Marcia was an award-winning television journalist as well as a director of communications for a large county government, where she managed two public television stations and a team of 42 people.

In addition to her professional philanthropic work, Marcia is passionate about her support of the arts in her own community through her involvement in the St. Petersburg Arts Alliance and New College of Florida. She has served as a member of the Art Museum Development Association, USF Graphic Studio Advisory Board, and Studio@620 Board of Trustees.

Marcia holds a Bachelor of Science in Business Management from the University of South Florida.

Areas of Expertise

Donor Relations and Stewardship
Major Gifts Coaching and Training
Individual Giving
Program Reviews

Client list

- International Eczema Council
- Nova Southeastern University
- University of Alberta
- University of Miami

Susan Cruse

Susan Cruse, Senior Consulting Vice President, brings nearly 40 years of professional management experience in both **higher education** and the **private sector** to provide fundraising best practice counsel to our clients. She specializes in **strategic campaign planning and execution** with an emphasis on **professional schools** and **institutions with academic medical centers**.

Prior to joining GG+A, Susan served as Senior Vice President, Development and Alumni Relations at **Emory University** for 11 years. Recruited to build a development organization capable of executing a \$1.6B comprehensive campaign, Susan created or restructured all fundraising programs, including establishing a **grateful patient fundraising** program for the health sciences which was highlighted by **AAMC** as one of three national models. She also created a **campaign operations platform** that included an **intranet site for collaborative work projects and information dissemination**. The campaign launched in fall 2008, and despite adverse economic conditions, which necessitated further restructuring, every giving segment increased during the campaign period, including a **115% increase in principal gifts**. The campaign exceeded its goal by nearly \$100M. In her last year at Emory, the university raised \$657.8M in philanthropy.

Before her work at Emory, Susan worked at **Johns Hopkins Institutions, Johns Hopkins Medicine**, first as Executive Director of Development and later as Associate Vice President for Development and Alumni Relations. In this role, Susan developed and refined strategy for \$1B Johns Hopkins Medicine campaign. The \$1B goal was achieved two years ahead of schedule, so the goal was increased to \$2B, and this was ultimately exceeded when the campaign ended in 2008.

Before joining Johns Hopkins, Susan worked in the **University of California System**. As Assistant Vice Chancellor, Corporate, Foundation, and University Research Park Relations for the **University of California, Irvine**, she provided strategic leadership to deans, faculty, development officers and volunteers to create programs to increase and sustain corporate and foundation support. She also managed the advancement strategy for the **University Research Park**, ensuring that URP tenants developed philanthropic partnerships with the university. Susan also served as the Associate Director, Cal-(IT)2.

In response to an RFP from the then Governor of California, Susan planned and executed the \$48M UC Irvine Corporate matching fund campaign to secure, with the University of California San Diego, one of four **California Institutes for Technology**. **Corporate commitments** were solicited within 6 weeks and achieved **160% of goal**. Susan also served at **UCLA**, first as the Associate Director of Development at the **John E. Anderson Graduate School of Management**, and subsequently as the Assistant Dean for External Affairs for the **School of Engineering**.

Before transitioning to higher education, Susan spent ten years in marketing in the private sector.

Areas of Expertise

Higher Education
Academic Medicine
Health Care
Corporate and Foundation Relations
Principal and Major Gifts

Restructuring Operations in Time of Crisis
Strategic and Campaign Planning
Aligning strategic plan goals with fundable priorities

Client list

- Pew Charitable Trust
- Rush
- University of Miami
- UVA

Michael Degenhart

Michael J. Degenhart, Consulting Vice President for Gift Planning, brings more than 20 years of professional experience in **development** and **fundraising** with **higher education** institutions.

Michael is currently serving as the Assistant Vice President of the Office of Gift Planning at The **Pennsylvania State University (Penn State)**, where he is responsible for the development and implementation of university-wide planned giving efforts for Penn State's 24 campuses. Widely considered a leader in the field of higher education **gift planning** and **principal gift** work, Michael has the unique ability to articulate very technical gift planning techniques in simple, understandable terms for donors. At Penn State, Michael and his office are tasked with an overall combined gift planning goal of \$100 million annually. He is a key member of the senior management team that directed Penn State's \$2 billion *For the Future* campaign that concluded in 2016 and the current \$2.1 billion *A Greater Penn State* campaign.

Preceding this position, Michael served for three years as the Assistant Vice President of the Office of Gift Planning at **Syracuse University**. While at Syracuse, Michael provided strategic leadership to aid central major gift staff and encouraged the consistent use of **blended gifts** to increase an individual's giving potential. He was also responsible for reorganizing assignments, streamlining rating systems, and directing gift officers to efficiently and effectively identify, qualify, and solicit prospects.

Prior to this experience, Michael spent seven years as the Associate Director of the Office of Trust, Estates & Gift Planning at **Cornell University**. Michael also served as Director of Capital Programs at **Hampden-Sydney College** and Director of Development and Gift Planning at the **Medical College of Ohio**. Before pursuing a career in higher education advancement, Michael served as Vice President in the Private Client Group with Robert W. Baird & Co. Michael has been quoted in *Bloomberg Wealth Manager*, *The Chronicle of Philanthropy*, and the *Journal of Gift Planning*. He has authored articles that have appeared in many publications, including *Planned Giving Today* and the *Major Gift Report*. Michael received his bachelor's degree in Economics from the University of Wisconsin, Madison, and holds a Master of Business Administration from the University of Rochester's Simon School of Business. He is a Certified Fund Raising Executive (CFRE), an Accredited Estate Planner (AEP) and a Chartered Advisor in Philanthropy (CAP).

Areas of Expertise

Higher Education
Gift Planning
Principal Gifts
Blended Gifts
Prospect Management

Client list

- American Orthopedic Association
- Carnegie Mellon University
- University of Colorado
- Dartmouth College
- Emory University
- University of Florida
- University of Maryland College Park
- The Ohio State University
- University of New Hampshire
- Princeton University
- University of Vermont Foundation
- University of Virginia

Michelle M. Dube

Michelle M. Dube, Vice President, brings to the firm **over 31 years of experience** in a variety of fields, including education advancement, marketing communications, and association management. Throughout her career, she has **led significant initiatives** such as **ambitious campaigns, major gifts, annual funds, leadership transitions, strategic planning, board management, alumni relations, and communications**.

Her success in all areas of independent school and higher education advancement position her perfectly to develop and provide practical, strategic recommendations, and counsel to her clients. Prior to GG+A, Michelle was a passionate fundraiser, **securing over \$20 million in endowments**, major gifts, annual funds, and gift planning commitments.

She served as a major gifts officer at the **West Point Association of Graduates, Wesleyan University, and The Master's School**, and as Director of Development at **The Storm King School**. She also headed the annual fund and alumni relations efforts at **Poly Prep Country Day School** and **The Dalton School**. Michelle has developed strong, **authentic relationships with donors**, prospects, and alumni.

She has firsthand experience with the nuances of fundraising and relationships in independent schools where the communities have unique sizes and dynamics. She has created and executed major gift strategies and recognizes the levels of commitment needed when working with this important and valuable constituent. This knowledge is critical in addressing her client's unique challenges and opportunities.

Earlier in her career, Michelle created a customer marketing program at Edify Corp. and honed her marketing communications skills at Cisco Systems. As an association manager at Danieli & O'Keefe Associates, she ran two technology organizations, **overseeing all operations and board management**.

Michelle has a Master of Arts in Liberal Studies with a concentration in Social Sciences from Wesleyan University and a Bachelor of Arts with a double major in English Literature and French from Middlebury College.

Areas of Expertise

Campaigns
Major Gifts
Annual Fund
Leadership Transitions
Strategic Planning
Board Management
Alumni Relations
Communications

Elizabeth Kolb Farr

Elizabeth Kolb Farr, Vice President, serves the firm's independent school and higher education clients, supporting these institutions in identifying and seizing opportunities for fundraising growth.

She possesses particular expertise in instituting and orchestrating high-performance major gift programs, preparing for and executing capital campaigns, sustaining and accelerating annual giving, coaching frontline fundraisers, and training Boards in fundraising and campaign best practices. She is a featured contributor in the **National Association of Independent Schools'** book, "The Trustee's Role in Fundraising."

Liz possesses significant experience in performing advancement program assessments and campaign feasibility studies that result in clear, **actionable recommendations for accelerating fundraising** in a campaign or between-campaign environments. She is an expert in **designing moves management protocols** and ensuring their effective use, developing individual prospect strategies, and utilizing Raiser's Edge and other databases to set and analyze fundraising metrics.

Before joining GG+A, Liz enjoyed **a 27-year career in independent schools**. Beginning as a teacher in boarding and day schools, she maintains a passion for teaching and learning. Liz most recently served as Associate Director of Development at The Shipley School in Bryn Mawr, Pa.

An active volunteer for the Council for Advancement and Support of Education (CASE), Liz has served on the Planning Committee of three CASE-NAIS Independent Schools Conferences and has presented several conference sessions, each time earning Stellar Speaker honors. Liz has also taught both professionals and volunteers assembled by the Association of Delaware Valley Independent Schools, the Association of Independent Maryland Schools, and the Association of Junior Leagues International. She is a past President of the Junior League of Philadelphia, where she was a five-time member of the Board of Directors, chaired the Annual Fund twice, and co-chaired the organization's first-ever capital campaign.

Liz is an alumna of Friends' Central School and holds a bachelor's degree in psychology from Vassar College. She lives in South Kent, Conn., with her husband, Chris, an advancement professional.

Areas of Expertise

Annual Giving
Major Gifts
Advancement Services
Campaign Planning

Client List

- American College of Sofia
- Association of Junior Leagues International
- Bucknell University
- The Bryn Mawr School
- Delaware Valley Friends School
- Episcopal School of Dallas
- Far Hills Country Day School
- Germantown Friends School
- Girls Preparatory School
- Greenhill School
- Hood College
- King School
- The Kinkaid School
- Kutztown University
- Manzano Day School
- Montclair Kimberley Academy
- National Cathedral School
- New Canaan Country School
- Polytechnic School
- San Francisco Friends School
- Sewickley Academy
- Sidwell Friends School

Richard Geiger

Richard Geiger, **Senior Vice President, Philanthropic Analytics**, brings to GG+A a wealth of experience as a sales and services professional with distinguished leadership roles in **selling and delivering strategy, analytics, business process and technology to large complex nonprofit organizations**.

At GG+A, Richard is responsible for marketing, sales, and product solutions within the Philanthropic Analytics practice area with **a focus on driving technology and data science initiatives**, innovative product/service development, and overall business strategy.

Prior to GG+A, Richard worked as Client Director, **Enterprise Markets Group at Blackbaud Inc.**, enabling organizations to provide more **mission impact through data-driven insights**, industry best practices, and technology.

Richard has had the great fortune to work with organizations including the American Cancer Society, March of Dimes, The Humane Society of the United States, Heifer, University of Arizona, Clemson, Furman, and West Virginia University Foundation. Prior to Blackbaud, Richard worked as Vice President, Philanthropy Operations at Feeding America. Here, he was a key member of the gift closing team for major and principal gifts, **earning commitments of more than \$3 million**.

Richard worked to provide leadership, strategy, and infrastructure and business process support for the organization's fundraising and marketing efforts. He holds a Bachelor of Arts with a dual degree in Business and Politics/Philosophy/Economics as well as a Masters of Urban and Regional Planning, both from the University of Pittsburgh. In addition, he holds a Certificate in Data Analytics and Visualization from Cornell University.

Areas of Expertise

- Data Governance
- Portfolio Management
- Business Process analysis in Fundraising
- Gift Prospecting
- Stewardship

Justin Glasson

Justin Glasson, Vice President, has **fifteen years of experience leading capital campaigns and annual fundraising operations** in support of arts, culture, and higher education. As a trusted partner to governing boards, executive directors, academic leaders, and senior development officers, he has spent his career helping organizations accomplish their most ambitious goals through strategic and effective fundraising.

Prior to joining GG+A, Justin served as **Chief Advancement Officer for the Hammer Museum at UCLA**, where he oversaw development, membership, events, and visitor experience at one of the nation's most influential and admired museums of contemporary art. He was responsible for all aspects of the museum's **\$180 million capital campaign**, including an award-winning case statement, a write-up in the New York Times featuring the high-profile campaign launch, and a pair of jointly announced **leadership gifts totaling \$50 million**.

In his previous role at the Asian Art Museum of San Francisco, he directed quiet-phase fundraising for the museum's **\$90 million transformation campaign**, including a \$25 million naming gift, additionally supporting its 24-member development team in expanding annual operating revenue over 30%. During a decade at the University of Chicago, Justin **led all fundraising and engagement efforts for the UChicago Arts initiative**, a landmark investment centered on the construction of the \$114 million Reva and David Logan Center for the Arts. The initiative also supported the creation of the Gray Center for Arts and Inquiry, the opening of the Arts Incubator in Washington Park, and the launch of a national alumni network for graduates working in arts and entertainment.

As development director for a university-wide strategic initiative, Justin was also deeply involved in planning, strategy, and readiness for the **University of Chicago's \$4.5 billion campaign**. In his prior role at the university's Smart Museum of Art, he secured **several of the largest individual, government, and foundation contributions** in the museum's history.

Justin is a graduate of the University of Texas at Austin and the University of Chicago. He lives in Los Angeles.

Areas of Expertise

Arts and Cultural Institutions
Higher Education
Campaign Strategy and Management
Capital Projects
Alignment with Institutional Strategy and Priorities
7- and 8-Figure Gift Solicitations
Naming Gift Policies and Proposals
Managing Major Gift Programs

Donor Recognition
Galas and Event Design
Membership Programs
Partnerships with Academic and Program Leadership
Grant Writing
Leadership Annual Giving
Volunteer Management

Client list

- Childhelp
- J. Paul Getty Trust
- Oakland Museum of California
- San Francisco Museum of Modern Art
- School of the Art Institute of Chicago
- University of Melbourne

John Glier

John Glier is the **Chief Executive Officer of GG+A**, a global consulting firm in philanthropic management headquartered in Chicago and London.

Mr. Glier joined GG+A in 1981, and has served as its **Chief Executive for more than 30 years**. Mr. Glier is recognized internationally for providing **strategic direction and philanthropic counsel** to many **leading universities, academic healthcare institutions, cultural and human service organizations**, and as an advisor to some of the **largest fundraising campaigns in higher education**. He has worked with the staff of well over 200 nonprofits and with a wide range of **voluntary leaders, noted philanthropists, and Board leaders** of distinguished institutions in **North America, Europe, Asia, and Australia**.

Mr. Glier has delivered numerous presentations over the last 35 years to a range of professional organizations, including the Association of American Medical Colleges (AAMC); Council for Advancement and Support of Education (CASE, CASE Europe, and CASE Asia-Pacific); American Bar Association Jackson Hole Conference on Law School Development; Woodmark Forum; Aspen Institute; American Alliance of Museums; Association of Fundraising Professionals (AFP); and to a variety of programs for university Deans and Presidents.

He has spoken on many different topics over the years, including **campaign planning and strategy in cultural, medical, human services, and educational institutions; building philanthropic board structures; the critical roles presidents and deans play in higher education fundraising; building large-scale compelling propositions, the key stages of the successful major gift process; and talent management and high performance across the nonprofit sector**. Mr. Glier is an emeritus member of the Providence College Board of Trustees, served on the Board of Directors of the Family Institute of Northwestern University, and serves as a Life Member of the Division of Humanities Council of the University of Chicago.

He has served on the Board of Directors of the New Trier Township High School Educational Foundation and was a founding director of the Winnetka Public Schools Foundation. He has also served as the Director and Chair of the Giving Institute (formerly AAFRC), as a member of EUConsult and the CASE Industry Advisory Council, and more recently as a member of the AMAtlas Advisory Committee to CASE, and a member of the executive committee of the Generosity Commission.

Of particular note is Mr. Glier's continuous work over many years with numerous **distinguished universities and academic medical centers** and their multiple campaigns. His clients have included Amherst College; University of Amsterdam; Brandeis University; Brown University; University of California, Los Angeles; California Institute of Technology; University of Cambridge; University of Chicago; Children's Hospital of Philadelphia; Columbia University; Cornell University; Curtis Institute of Music; Duke University; Emory University; Georgetown University; Guggenheim Museum; INSEAD; The Johns Hopkins Institutions; London School of Economics; Mayo Clinic; McGill University; Monticello and the Thomas Jefferson Foundation; The Ohio State University; University of Oxford; Pennsylvania State University; Princeton University; University of Queensland; San Francisco Symphony; Singapore Management University; University of Southern California; Stanford University; Sydney Opera House; University of Toronto; the United Nations High Commissioner on Refugees; University of Washington; and Yale University.

Mr. Glier attended Providence College (Rhode Island), the Université de Fribourg (Switzerland), and the University of Chicago, and was awarded a Fulbright Fellowship. He holds degrees in English and Comparative Literature.

Grenzebach Glier and Associates has served more than 6,000 institutions and organizations since 1961, providing counsel to more than 30 of the top 50 globally ranked universities, all 63 members of the American Association of Universities, more than 100 of America's most distinguished academic medical centers and hospitals, more than 50 British and foreign universities, Canada's leading research universities, distinguished public universities in all 50 states, as well as arts, voluntary, and other nonprofit organizations around the world. The firm advises institutions with aggregate campaign goals of more than \$60 billion.

Client list

- American Bar Association
- American Heart Association
- University of Amsterdam
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Arizona State University
- Association of American Medical Colleges
- Babson College
- Barack Obama Foundation
- Ben-Gurion University
- Beth Israel Hospital
- Boys & Girls Clubs of America
- Brandeis University
- Brown University
- California Institute of Technology
- California Institute of the Arts
- Cambridge University Health Partners
- Carnegie Museums of Pittsburgh
- Catholic Charities Archdiocese of New York
- Center for Strategic and International Studies
- Children's Hospital Association
- Children's Hospital of Philadelphia
- City of Hope
- Club de Madrid
- College of William and Mary
- Colorado School of Mines
- Columbia University
- Combined Jewish Philanthropies of Greater Boston
- Cornell University
- Corpus Christi College Curtis Institute of Music
- Cyprus Research and Educational Foundation
- Dana-Farber Cancer Institute
- Dartmouth College
- Development Corporation
- Duke Cancer Institute
- Duke University
- École Polytechnique de Montréal
- Eisenhower Fellowships
- Emory University
- Emory University – The Robert W. Woodruff Health Sciences Center
- Fordham University
- Georgetown University
- Grinnell College
- Harvard Medical School
- Harvard University
- HEC Montréal
- Huntsman Cancer Foundation
- Imperial College London
- Indiana University
- Indianapolis Museum of Art
- INSEAD

- Institute of Cancer Research
- Ivey School of Business
- Johns Hopkins Institutions
- Keck Medicine of the University of Southern California
- Kellogg College
- LDS Philanthropies/Brigham Young University
- London Business School
- London School of Economics and Political Science
- London School of Hygiene & Tropical Medicine
- Los Angeles County Museum of Art
- Los Angeles Orthopaedic Hospital
- Los Angeles Philharmonic
- Loyola University of Chicago
- Massachusetts Institute of Technology
- Mayo Clinic, Rochester
- McGill University
- McGill University Health Centre
- Memorial Sloan-Kettering Cancer Center
- Merton College
- Michigan State University
- Monticello, the Thomas Jefferson Memorial Foundation
- Museum of Contemporary Art
- National Academies of Sciences, Engineering, and Medicine
- National Collegiate Athletic Association (NCAA)
- National Foundation for Teaching Entrepreneurship
- New American Schools
- New York Philharmonic
- Northwestern University
- NPR
- Ohio University
- Olin College of Engineering
- Oxford University
- Penn Medicine
- Pennsylvania State University
- Philadelphia Museum of Art
- Phillips Academy Andover
- Princeton Healthcare System Foundation
- Princeton University
- Providence College
- Purdue University
- Rensselaer Polytechnic Institute
- Rhode Island School of Design
- Rutgers University, Newark
- San Francisco Museum of Modern Art
- San Francisco Symphony
- Scripps Institution of Oceanography
- Singapore Management University
- Smithsonian Institution
- Southern Methodist University
- Spring Hill College
- St. Catherine's College
- St. Cross College
- St. Louis Symphony Orchestra
- Stanford University
- Stanford University Medical Center
- State University of New York at Stony Brook
- Stephens College
- Sydney Opera House
- The Academic Medical Centre, University of Amsterdam
- The Jewish Museum
- The National Trust for Scotland
- The Ohio State University
- The Pacific Northwest Ballet
- The Pew Charitable Trusts
- The Solomon R. Guggenheim Foundation and Museum
- The Sutton Trust
- The University of Kansas
- The University of Queensland

- The University of Texas at Austin
- The University of Texas MD Anderson Cancer Center
- Thomas Jefferson University
- United Nations High Commissioner for Refugees (UNHCR)
- United States Military Academy
- United States Naval Academy Foundation
- United States Olympic Committee
- Université de Montréal
- University College London
- University of Aberdeen
- University of Amsterdam
- University of Bath
- University of Birmingham
- University of Bristol
- University of California, Davis
- University of California, Los Angeles
- University of California, San Francisco
- University of Cambridge
- University of Chicago
- University of Chicago Booth School of Business
- University of Cincinnati
- University of Colorado System
- University of Connecticut
- University of Durham
- University of Florida
- University of Hawaii
- University of Illinois
- University of Kent in Canterbury
- University of Leeds
- University of Massachusetts Amherst
- University of Missouri-Columbia
- University of Notre Dame
- University of Oregon
- University of Oxford
- University of Pennsylvania
- University of Pittsburgh Medical and Health Sciences Foundation
- University of Rochester
- University of Southern California
- University of Strathclyde
- University of Toronto
- University of Virginia
- University of Warwick
- University of Washington
- University of Wisconsin
- University of Wyoming
- Vanderbilt University
- Vanderbilt University Medical Center
- Villanova University
- Virginia Polytechnic Institute and State University
- Weill Cornell Medicine
- Wharton School of the University of Pennsylvania
- Whitney Museum of American Art
- Yale-New Haven Hospital
- Yale University
- Yale University School of Medicine

Kyle Gorden

Kyle Gorden, Consultant, brings to GG+A **more than 25 years of experience** in higher education and nonprofit arts management. His areas of expertise include strategic planning, advancement communications, constituency development, and volunteer management.

Prior to his current role, **he served for two years as chief of staff** to the firm's CEO, John Glier, coordinating all communications from the executive office and serving clients ranging from **the Obama Foundation** to the **University of Cambridge**.

Before joining GG+A, Kyle served as Director of Campaign and Internal Communications for Alumni Relations and Development at the **University of Chicago**. In that role he launched the first internal communications program for the organization and led numerous communication initiatives in the development of the University's **\$4.5 billion campaign**. Earlier, as Assistant Director of Class and Campus Programs, he helped program and market the University's annual Alumni Weekend and class reunion events.

Kyle has served in a variety of creative and administrative roles within arts, culture, and civic organizations, including as Director of Advancement, Dramaturg, and Playwright for the Silk Road Theatre Project, which presented staged readings of his adaptations of three classic Japanese Noh plays. He was also Producing Director of The Civilians, an Obie-winning Off-Broadway theatre company based in New York City, and Associate Director of Marketing for Court Theatre in Chicago. Earlier in his career he worked at the Juanita K. Hammons Hall for the Performing Arts, Theater on the Lake, and Lincoln Park Zoo. He also founded the multidisciplinary Hyde Park - University of Chicago Arts Fest.

In 2004-2005, Kyle was a Vilar Fellow in Arts Management at the John F. Kennedy Center for the Performing Arts. He holds a Bachelor of Arts degree from the University of Chicago with a concentration in East Asian languages and civilizations and spent a year abroad at the Stanford Japan Center where he received an independent study grant from the Japan Foundation.

Areas of Expertise

Benchmarking
Campaign Structure
Program Funding
Campaign Planning

Client list

- University of Alberta
- AMITA Health
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Association of Public and Land-grant Universities
- Barack Obama Foundation
- University of British Columbia
- Brown University
- University of California, Los Angeles
- University of Calgary
- University of Cambridge
- University of Chicago Medicine
- Children's Hospital Association
- Chuck Noll Foundation for Brain Injury Research

- Cornell University
- Curative Care Network
- Dana-Farber Cancer Institute
- Dartmouth College
- Duke University
- Emory University
- Englewood Health Foundation
- Florida Atlantic University
- University of Florida
- Harvard University T.H. Chan School of Public Health
- Imperial College London
- INSEAD
- The Johns Hopkins University
- Keck Medicine of the University of Southern California
- King's College London
- Loyola Marymount University
- University of Massachusetts, Amherst
- Massachusetts Institute of Technology
- University of Melbourne
- The Newberry Library
- The University of North Carolina at Chapel Hill
- The University of North Carolina at Greensboro
- University of Pennsylvania
- Pennsylvania State University
- Princeton University
- Providence College
- Reading Hospital Foundation
- Rush University Medical Center
- The Smithsonian Institution
- Solar Impulse
- Tecnológico de Monterrey
- University of Toronto
- Trinity College
- Urban Land Institute
- University of Virginia
- Virginia Polytechnic Institute and State University
- WNET
- Yale Cancer Center
- Yale University

Martin Grenzebach

Martin Grenzebach, Chairman of GG+A, has **served the firm since 1974**. His consulting work encompasses **campaign consultation, supervision of capital campaigns, strategic planning studies, and strategic and organizational counsel, as well as overall marketing and management of services** offered by the firm.

Martin's special expertise is **working with higher education and medical institutions**. A small sampling of clients that Martin has served extensively include Georgia State University, University of Illinois Urbana–Champaign, University of Kansas, the University of Texas MD Anderson Cancer Center, University of Maryland Medical Systems Foundation, University of Minnesota, University of Nebraska, Oregon State University, University of Pittsburgh, University of South Carolina, and the University of Washington.

A frequent speaker at professional conferences and programs, Martin has made presentations at district and national programs for the **Council for Advancement and Support of Education** (CASE) as well as at CASE Capital Fundraising and Capital Campaign conferences. He also has been a speaker at conferences for the Big Ten Fund Raisers Institute, the Big Ten Directors of Development annual conference, The Big 12 Development Conference, the joint annual meeting of the American Council on Education and the National Association of State Universities and Land Grant Colleges, and the American Association of Medical Colleges.

Martin's service to the professional fundraising community includes membership on the CASE Campaign Reporting Advisory Group that originally produced the CASE Campaign Standards guide, a pioneering document to assist with management and reporting standards for educational fundraising campaigns.

At the Morgan Park Academy in Chicago, where he once taught, Martin served 10 years on its Board of Trustees and six years as chairman of their development committee. He is a former member of the Chicago Crime Commission and a former trustee of the University of Charleston, West Virginia.

Areas of Expertise

Major gifts
Case for support
Sustaining fundraising

Client list

- Advocate Charitable Foundation
- Allegheny College
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Auburn University
- Ball State University
- Baylor College of Medicine
- Bucknell University
- Case Western Reserve University
- Catholic Archdiocese of Chicago
- Children's Hospital Foundation
- Children's Hospital Trust
- Children's Medical Center Dallas
- City of Hope
- Clarkson University
- Clemson University
- Cleveland Clinic Foundation
- Cleveland State University
- Colorado School of Mines

- DePaul University
- Drake University
- Florida Atlantic University
- Folger Shakespeare Library
- Georgetown University
- Georgia State University
- Graduate Theological Union
- Hoag Hospital Foundation
- Houston Methodist Hospital Foundation
- Indiana State University
- Indiana University
- Iowa State University
- Kansas State University
- Kentucky State University
- Lincoln Park Zoo
- Loma Linda University Health
- Los Angeles Philharmonic
- Louisiana State University
- Loyola Marymount University
- Loyola University Medical Center
- Loyola University New Orleans
- Loyola University of Chicago
- Lucile Packard Children's Hospital
- Mankato State University
- Mayo Clinic, Rochester
- Miami University
- Michigan State University
- Michigan Technological University
- Milwaukee School of Engineering
- Minnesota Medical Foundation
- National Math and Science Initiative
- Northern Illinois University
- Northern Michigan University
- Northwestern University
- Norton Healthcare Foundation
- Ochsner Medical Center
- Ohio University
- Oregon State University
- Pennsylvania State University
- Purdue University
- Rockhurst College
- Smithsonian National Air and Space Museum
- Southern Illinois University at Carbondale
- St. Edward High School
- St. John's School
- Sweet Briar College
- Temple University
- The City University of New York
- The George Washington University
- The Madeira School
- The Ohio State University
- The University of Arizona Foundation
- The University of Arkansas
- The University of British Columbia
- The University of Kansas
- The University of Texas MD Anderson Cancer Center
- United States Coast Guard Academy
- United States Military Academy
- University of Alabama
- University of Alberta
- University of California, Davis
- University of California, Riverside
- University of California, San Francisco
- University of Central Florida
- University of Delaware
- University of Florida
- University of Houston System
- University of Illinois Foundation
- University of Iowa
- University of Kentucky College of Engineering
- University of Kentucky Hospital
- University of Maryland Medical System
- University of Massachusetts Amherst
- University of Massachusetts Boston
- University of Minnesota Carlson School of Management
- University of Minnesota Foundation
- University of Minnesota Institute of Technology
- University of Missouri-Columbia

- University of Missouri-Kansas City
- University of Montana
- University of Nebraska
- University of Nevada, Reno
- University of New Mexico
- University of North Florida
- University of Pittsburgh
- University of San Diego
- University of South Carolina
- University of South Carolina School of Medicine Greenville
- University of Tennessee
- University of Washington
- University of Wisconsin-Madison
- Utah State University
- Washington State University
- Wayne State University
- Whitman College
- YMCA of Waukesha

Suzanne Hilser-Wiles

Suzanne Hilser-Wiles, President, partners with GG+A clients around the globe to help them elevate their fundraising by offering more than 25 years of experience in **advancement, program building, and campaign planning and implementation**. Throughout her career, she has helped design, rebuild, and reimagine programs by applying her experience with a wide range of advancement programs and institutions. She has worked closely with her clients through their individual challenges and opportunities, including ambitious **campaigns, changes in leadership, crises, and restructuring**. She has focused her work in the **higher education, healthcare, independent schools, and artistic and cultural sectors**.

Suzanne joined GG+A in 2011 and was appointed to the firm's executive committee in 2013. In 2016, she became the firm's first woman **president** in its nearly 60-year history. In addition to her other responsibilities, she leads the firm's **Europe and U.K. practice**.

Her extensive previous professional experience includes **fundraising, communications, and marketing development**, specifically **admissions marketing, alumni relations, and press office management**. She has developed and implemented **individual major giving programs** and designed **training and support programs to engage executives, deans, and trustees in fundraising**.

Suzanne has partnered with GG+A clients across all of the firm's sectors, providing strategic counsel to Development teams and institutional leadership. This vast array of clients includes the **Art Institute of Chicago; Charlotte Country Day School; Dana-Farber Cancer Institute; Drexel University; Fuller Theological Seminary; IESE Business School; The University of North Carolina at Chapel Hill; and Tate**.

Prior to joining the firm, Suzanne served as Vice-Chancellor for Advancement at **University of North Carolina School of the Arts (UNCSA)**, where she also served on an executive team advising the university's chancellor on all major policy decisions and as the primary staff member for the Advancement Committee of the Board of Trustees. Suzanne joined UNCSA from **CancerCare**, a national healthcare nonprofit based in New York City, where she served as Director of External Affairs, overseeing the **evaluation and redesign** of four major programs: **direct mail, gift processing, major gifts, and sponsorship**.

Before joining CancerCare, Suzanne served as Senior Development Officer for Corporate Annual Programs at **The Metropolitan Museum of Art**, where she oversaw the Museum's annual corporate fundraising program and staffed the Museum's business committee. Previously, Suzanne served as Associate Director of Individual and Leadership Giving at the Museum of Modern Art. Suzanne began her career in institutional advancement with **Pets are Wonderful Support** in San Francisco, where she served as Director of Development.

Suzanne received her Bachelor of Arts degree in art history from The University of North Carolina at Chapel Hill and holds a Master of Arts degree in arts administration from Golden Gate University in San Francisco.

Areas of Expertise

Arts and Culture
Higher Education
Academic Medicine
Prospect Management
Portfolio Management

Client List

- American School of Paris
- American University in Bulgaria
- Carnegie Library of Pittsburgh
- Celebrity Series of Boston
- Charlotte Country Day School
- Christ School
- College of Charleston Foundation
- Cornell University
- Curtis Institute of Music
- Drexel University
- Duke Cancer Institute
- Duke Children's Hospital & Health Center
- ESADE Business School
- Friends' Central School
- Georgia State University
- Hammer Museum
- IE University
- IESE Business School
- IESE International Foundation
- INSEAD
- Institute of Molecular and Clinical Ophthalmology Basel
- J. Paul Getty Museum
- Joseph L. Rotman School of Management, University of Toronto
- Los Angeles Philharmonic Association
- Mary Bird Perkins Cancer Center
- Museum Kunst der Westküste (Föhr, Germany)
- National Audubon Society
- New Jersey Performing Arts Center
- New York Philharmonic
- Nova Southeastern University
- Pennsylvania Horticultural Society
- Pennsylvania Society for the Prevention of Cruelty to Animals
- Pennsylvania State University
- Pennsylvania State University—University Park
- Philadelphia Museum of Art
- Prince's Trust International

- San Francisco Museum of Modern Art
- Smithsonian Institution
- South Georgia Heritage Trust
- Sterling and Francine Clark Art Institute
- Sweet Briar College
- Tate
- The Art Institute of Chicago
- The Bryn Mawr School
- The Children's Museum of Indianapolis
- The Jackson Laboratory
- The Loomis Chaffee School
- The Pew Charitable Trusts
- The Phillips Collection
- The Solomon R. Guggenheim Foundation and Museum
- The University of Mississippi
- The University of North Carolina at Chapel Hill
- The University of North Carolina PlayMakers' Repertory Company
- The University of North Carolina School of the Arts
- The University of Queensland
- Tower Hill School
- University of Calgary
- University of Cambridge
- University of Chicago Booth School of Business
- University of Nebraska Foundation
- University of Nevada, Reno
- University of Pennsylvania
- University of the Arctic
- University of Toronto
- University School of Nashville
- Victoria University in the University of Toronto
- Westover School
- William Penn Charter School
- Victoria University of Wellington, New Zealand

Marti Jones

Marti Jones, Consulting Vice President, brings more than 20 years of **integrated communications** experience from world-renowned **healthcare organizations**. Marti's career has grown from raising awareness and funds for the **American Red Cross** before and after 9/11 to leading strategy for world-renowned brands such as **Mayo Clinic**, **Duke Health**, and **M Health Fairview**, which included communications for change management and COVID-19.

Marti led the **strategy for communications and marketing** to advance Mayo Clinic's clinical, philanthropy, and research efforts. She was the chief architect of its first-ever \$30 million **strategic plan** to **increase brand performance** and generate demand to solidify the clinic's position as the leading **destination medical center**.

Marti also oversaw the communications and launch for Mayo's \$3 billion philanthropic campaign, leveraging **research, events, digital media, media relations**, and for the first-ever **advertising**. She also rebuilt a division by recruiting a team with **digital and content marketing experience**.

As Vice President of Communications for **UnitedHealth Group**, she advanced its \$40 billion Medicare portfolio through **media relations, public affairs, and thought leadership**. Marti's messaging portfolios are supported by her academic background and proven methodology, as she taught writing at the **University of Minnesota** and honed her craft at **UnitedHealth Group UCare**, and **Hill & Knowlton**.

Marti received her master's degree in public affairs and administration from George Washington University and Bachelor of Arts degrees in communications and psychology from Augustana University.

Marti currently serves as a board member on the Minnesota Commission on National and Community Service and Retrieve a Golden of the Midwest.

Areas of Expertise

- Campaign Communications and Marketing
- Development Strategic Plans
- Research Events
- Digital Media
- Media Relations
- Advertising
- Digital and Content Marketing
- Public Affairs
- Thought Leadership

Rod Kirsch

Rod Kirsch, Consulting Vice President, brings to the firm a wealth of **alumni** and **higher education development** experience. Over his 34-year career in university fundraising, he provided **executive leadership** in the raising of more than \$5 billion of philanthropy.

Rod currently holds the title of Senior Vice President Emeritus for Development and Alumni Relations at **The Pennsylvania State University**, after serving as its Senior Vice President for 20 years. Rare in the length of tenure and record of accomplishment at one institution, he led from start to finish two seven-year, **billion-dollar-plus capital campaigns**. Under his leadership, Penn State's **endowment** sextupled, its annual donor base increased from 125,000 to 193,000, and the Penn State **Alumni Association** grew to 177,000 members, the largest of any dues-paying university association in the country.

Kirsch is widely credited as the driving force behind the success of "For the Future: The Campaign for Penn State Students." This seven-year \$2 billion effort took place amid a historic economic upheaval and during one of the worst crises a higher education institution has ever faced. The campaign concluded on schedule and in excess of its goal with \$2.19 billion raised and donations from 176,000 alumni, setting a new **alumni participation record** among public and private institutions. Institutions such as Michigan State University and the University of Missouri, as well as professional organizations like the Council for the Advancement and Support of Education and the Association of Donor Relations Professionals, have benefitted from his expertise and experience as a leader during a major crisis.

Rod currently consults on a range of topics, including **campaign planning and management, organizational design and assessment, resource development and budget planning, crisis fundraising, professional staff development and mentoring, the alignment of academic and philanthropic priorities, and the role of academic leadership in fundraising.**

He previously served as Senior Vice President for Development at the **Indiana University Foundation**, Executive Director, Capital Campaign at the **University of California at Berkeley**, Director of Annual Giving at **Drake University**, and Director of Undergraduate Chapter Services at **Delta Upsilon International Fraternity**.

Rod served as a faculty member of the Big Ten Fundraisers Institute, a premier educational seminar for senior development professionals, for 15 years, in addition to frequent speaking engagements at CASE seminars. He is also a board member of **Nurturing Minds in Africa**, a non-profit working to educate girls in Tanzania.

Rod is a recipient of the Distinguished Alumnus Award from the School of Education at Indiana University. In 2014, the Penn State Alumni Association granted him Honorary Alumnus status, and in 2016, he was recognized by Penn State as its Renaissance Honoree of the Year.

A proud native of North Dakota, Rod holds a Master of Science in Higher Education from Indiana University Bloomington, and a Bachelor of Arts in English with Phi Beta Kappa honors from the University of North Dakota.

Areas of Expertise

Higher Education
Executive Leadership
Communicating/Managing Through Crisis
Campaign Planning and Management
Organizational Design Resource Development
Budget Planning
Professional Staff Development and Mentoring
Alignment of Academic and Philanthropic Priorities

Client List

- University of California at Los Angeles
- Drake University
- Emory University
- Florida State University
- University of Kentucky
- University of Massachusetts, Amherst
- MGH Institute of Health Professions
- New York Institute of Technology
- Quinnipiac University
- University of Sydney
- University of Texas at Austin
- University of Toronto
- University of Virginia

Anne S. Kohn

Anne S. Kohn, Consulting Associate, brings to the firm more than **15 years of professional experience** in the performing arts.

Since joining GG+A, Anne has worked across all sectors of nonprofits with a particular focus and passion for **arts and cultural clients** such as the **Lyric Opera of Chicago, California Academy of Sciences, Folger Shakespeare Library, Bishop Museum and League of Chicago Theatres**. Prior to joining GG+A, Anne served as Managing Director at Bristol Riverside Theater in Bristol, Pennsylvania.

In addition to producing and planning annual mainstage events, Anne **cultivated relationships with major donors and local businesses to deepen the organization's value** in the community. Before her work at Bristol, Anne was Associate Managing Director at the Shakespeare Theater Company in Washington, DC, where she managed a \$20 million budget and implemented an organization-wide communication plan.

Her other professional roles have included **founding No Rules Theatre Company**, serving as marketing manager, assistant director, and grant writer at various performing arts organizations in Ohio and North Carolina.

Anne holds a Master of Fine Arts in Arts Management from the University of North Carolina School of the Arts and a Bachelor of Arts in psychology from Hiram College.

Areas of Expertise

Arts and Culture
Annual Giving
Development Operating Plan

Client List

- Bishop Museum
- California Academy of Sciences
- Charlotte Latin School
- Da Vinci Science Center
- Drexel University
- Folger Shakespeare Library
- Fuller Theological Seminary
- Germantown Friends School
- IESE Business School
- League of Chicago Theatres
- Loyola University Maryland
- Lyric Opera of Chicago
- MD Anderson Cancer Center
- New York Botanical Gardens
- Nova Southeastern University
- Our Lady of the Lake Foundation
- San Francisco Museum of Modern Art
- School of the Art Institute of Chicago
- Tuerk House
- University of South Florida
- University of Texas Health Science Center at Houston
- Urban Land Institute
- Yeshiva University

J. Thomas Krimmel

J. Thomas Krimmel, Consulting Vice President, joined GG+A in 2014, **bringing more than 30 years of chief development officer experience** in higher education and the voluntary sector to the firm. Throughout his career, he has launched high-performing major and principal gift programs and built leadership annual giving programs that have led to rapid increases in gift revenue.

Tom currently serves his undergraduate alma mater, the **University of Wisconsin-Parkside**, as Associate Chancellor for University Development and Alumni Relations. Previously, he served as Vice President for Development, Family and Alumni Relations at the Franklin W. Olin College of Engineering. Under his leadership, Olin **led the nation in undergraduate alumni and parent participation rates**.

Tom also served as Chief Development Officer for the Network for Teaching Entrepreneurship, where he led efforts to **increase giving from \$7.7 million to \$14.3 million in three years**. He created a prospect management and pipeline status system throughout the 11 US offices and also played a leadership role in opening four new regional offices and building their local boards. Previously, he served for 15 years as Vice President, Development and Alumni Relations at Babson College, where he developed a campaign plan and led a team of volunteers and staff in securing more than \$122 million during a five-year comprehensive campaign. He also **increased the annual fund from \$800,000 to \$6.25 million** and secured funding from successful entrepreneurs for Babson's entrepreneurship program, which is now ranked #1 in the United States at both the undergraduate and graduate levels.

Tom also served as **Senior Vice President for Development at Antioch University**, where he **led a successful \$50 million campaign**, and as Director of Development and Alumni Relations at the University of Wisconsin-Parkside.

Tom holds a bachelor's degree in psychology from the University of Wisconsin-Parkside and a master's degree in educational administration from the University of Wisconsin-Milwaukee.

At GG+A, he has directed the firm's engagement with INSEAD (France and Singapore); The Pennsylvania State University College of Engineering; University of Wisconsin-Parkside; Endicott College; Suffolk University and Wageningen Universiteit en Researchcentrum (Netherlands).

He has also worked with the GG+A teams on projects at University of North Carolina-Chapel Hill, Kingswood-Oxford School and The Pennsylvania State University College of Agriculture Sciences.

John Kudless

John Kudless, Senior Consulting Vice President, brings more than 45 years of experience in **fundraising** and **institutional advancement** for **educational, academic, medical, and cultural institutions**.

Before he joined GG+A, John served at **The Johns Hopkins Institutions** for 14 years. He held the position of Executive Director of Development for **Principal Gifts**, focusing on \$1 million-plus commitments for the university and hospital from **alumni, parents, patients, and friends**. John previously worked with Johns Hopkins as Director of Development for the **School of Public Health** on the medical campus and as Associate Director for Planned Giving for the university and hospital.

Prior to his responsibilities with Johns Hopkins, John served as Vice President for Alumni and University Relations at **Georgetown University**. John also served as Vice President for Advancement at **Virginia Commonwealth University** (VCU). While at VCU, the only urban campus in the Virginia state university system, the university successfully completed its first capital campaign, **exceeding the goal by 20 percent and achieving the goal one year ahead of schedule**. During his tenure, VCU nearly doubled its **endowment**, heightened its visibility throughout Virginia and the nation, and established new alumni programs in a recently merged multi-campus environment.

Early in his career, John also worked as Director of Development for the **National Symphony Orchestra**, where he initiated the Orchestra's first endowment program and expanded **volunteer leadership, direct mail, and planned giving activities**.

He holds a bachelor's degree in political science from Northeastern University and a master's degree in political science from The American University.

Areas of Expertise

Higher Education
Academic Medicine
Planned Giving
Principal and Major Gifts
Volunteer Leadership

Client list

- University of Alabama at Birmingham
- Cancer Institute of New Jersey Foundation
- Albright College
- City of Hope
- American Red Cross
- Columbia University Mailman School of Public Health
- Babson College
- University of Connecticut
- The Baldwin School
- Dana Hall School
- Baltimore Community Foundation
- Dickinson College
- Bryant University
- The Doheny Eye Institute
- Bryn Mawr College
- Duke University Medical Center
- University of California, Davis
- Elon University
- Emory University
- University of Pennsylvania

- The Field School
- The Pennsylvania State University
- Goucher College
- Rensselaer Polytechnic Institute
- University of Hawaii
- Rowan University
- University of Houston System
- Saint Joseph's University
- Inova Health System Foundation
- The Salk Institute for Biological Studies
- James Madison University
- Northeastern University
- The LDS Philanthropies, Brigham Young University
- Oklahoma State University Foundation
- Louisiana State University Foundation
- Penn State Milton S. Hershey Medical Center
- Loyola Marymount University
- The Salvation Army
- Marymount University
- University of South Florida
- MedStar Health System
- University of Southern Mississippi
- University of Miami
- St. Paul's School, Maryland
- Miami University
- Tulane University
- University of Missouri
- United States Golf Association
- National Academy of Sciences
- United States Naval Academy Foundation
- Natural History Museum of Los Angeles County
- University of Virginia Health System
- North Carolina State University
- Western Michigan University
- University of North Carolina, Charlotte
- Wheaton College
- University of North Florida

Shelby LaMar

Shelby LaMar, Consulting Vice President, serves clients within our **independent school** practice area. He has more than 20 years of experience within this sector, including managing **capital campaigns, annual funds, and advancement services**, as well as **communications and marketing development**, including **proposal** writing, and **case statement** development.

Shelby has served for nine years at **Lancaster Country Day School (LCDS)** as the Chief Advancement Officer, where he oversees **development operations, campaign management, and constituent relations** for the 550 students, P-12, independent day school. During his tenure, he has prepared the school for its two largest capital campaigns, expanded the school's **endowment**, expanded the reach of the school's network, participated in **strategic planning** and collaborated with the communications team to broaden **development messaging**, and intensify its presence in **social media**.

Prior to LCDS, Shelby served as the Associate Director of Development at **St. Stephen's and St. Agnes School** (Alexandria, VA). In this role, he collaborated with the Development Director and key volunteers to raise **major gifts**, recruit and manage **talent**, design **direct mail**, oversee **leadership annual giving**, and write **grant proposals** for local and national charitable foundations. Outside of education, Shelby has also provided development counsel for **healthcare, religious, and educational organizations**.

Shelby has presented nationally at the Council for Advancement and Support of Education/National Association of Independent School annual conference. At the regional level, Shelby has spoken at the Association of Independent School of Greater Washington (AISGW) and Association of Delaware Valley Independent Schools (ADVIS).

Shelby received his bachelor's degree from Washington and Lee University and earned his MBA from Elizabethtown College and knows independent schools both as a parent and a lifer at his own alma mater.

Areas of Expertise

- Independent Schools
- Major Gifts
- Direct Mail
- Leadership Annual Giving
- Talent Management
- Advancement Services
- Strategic Planning
- Development Messaging through Social Media

Creighton Lang

Creighton Lang, Senior Vice President, brings to the firm more than 25 years of consulting experience, with a long-term emphasis on sales, marketing, and constituent analytics for organizations that use **high-touch business models** to serve institutional clients and individuals with high net worth.

At GG+A, Creighton **leads the firm's multi-year advancement leadership program**, which promotes executive-level dialogue on excellence and best practices in fundraising and institutional advancement. In addition, he consults with clients on a number of metrics, analytics and data-related projects, including peer benchmarking, Advancement Services program reviews, software requirements and selections, information governance, and organizational analytic enablement.

Prior to joining GG+A, Creighton served as **Vice President of Global Delivery** for the Business Intelligence, Analytics & Performance Management practice at **NTT DATA**. In this position, he had overall responsibility for delivery success, talent management, domain development, and sales enablement in North America for the global practice of 800-plus consultants. Prior to NTT DATA, Creighton was **Vice President of Business Intelligence** at The Revere Group, where he was responsible for leading a national practice across four regions with more than 35 consultants. Creighton started his career at **Nuveen Investments**.

Creighton holds a bachelor's degree in management information systems and finance from the University of Arizona and is a graduate of The St. Mark's School of Texas in Dallas.

Areas of Expertise

Information Technology
Analytics roadmaps
Institutional comparisons/benchmarking

Client List

- Ann & Robert H. Lurie Children's Hospital of Chicago
- Chicago Community Trust
- Dartmouth College
- Drexel University
- Duke University
- Harvard Business School
- Johns Hopkins University
- Kansas University Endowment
- Pennsylvania State University
- The Ohio State University
- University of California, Los Angeles
- University of Florida
- University of Pennsylvania
- University of Rochester
- University of South Florida
- University of Texas, Austin
- University of Toronto
- University of Virginia
- University of Wisconsin Foundation
- Yale University

Pete Lasher

Pete Lasher, Senior Vice President, brings to the firm **more than 25 years of successful fundraising experience**, including leadership of **five separate billion-dollar capital campaigns** at both private and public institutions in the US. As a consultant, he currently advises universities in North America and the UK that are in or have **successfully completed campaigns ranging from \$300 million to \$2.5 billion**.

Throughout his career, Pete has specialized in **driving fundraising performance** by utilizing philanthropic analytics and performance metrics to achieve campaign goals. He has particular expertise in board and volunteer management, campaign operations, major and principal gift program management, performance analytics, and fundraising training of development staff and academic and volunteer leadership.

Pete most recently served as the Associate Vice President for University Development for **Michigan State University's Advancement** team, where he directed campaign operations and managed a fundraising staff. Previously, Pete was Associate Vice President for University Development at Georgetown University and served as Associate Senior Vice President of Development at the University of Southern California.

Pete has also held leadership positions at other premier institutions, including **Associate Dean for Development and Alumni Relations** at the University of North Carolina's Kenan-Flagler Business School and Assistant Dean for External Relations at the University of Washington's Foster School of Business.

Pete has a master's in business administration from the University of North Carolina at Chapel Hill and a bachelor's degree in history from Hamilton College.

Areas of Expertise

Performance Management
Fundraising Training
Campaign Design and Execution
Volunteer Management
Vision and Priority Setting
Development of Compelling Gift Opportunities

Client list

- Cardiff University
- Columbia University
- Columbia University Mailman School of Public Health
- Cornell University
- Curtis Institute of Music
- Folger Shakespeare Library
- INSEAD
- King's College Cambridge
- McGill University
- The Pew Charitable Trusts
- University of Calgary
- University of Cambridge
- University of Denver, Mt. Allison
- University of Toronto

Dan Lowman

Dan Lowman is Senior Vice President & Director of **GG+A's SurveyLab**. Dan created SurveyLab as a division within GG+A in 2016 and since that time he has overseen hundreds of surveys for all types of nonprofit organizations.

SurveyLab has become the **industry's gold standard for research** into charitable giving intent, attitudes toward an organization, case/brand messaging testing, and many other subjects. Dan oversees survey content, methodology, and reporting for online, print, phone, and in-person surveys.

In 2019, Dan and the **SurveyLab team launched DX: The Donor Experience Dashboard**, a revolutionary new product to provide real-time metrics for **donor relations and stewardship programs**

In 2004, Dan led the team that developed and launched **DonorScape®, the first-ever web-based prospect screening service**. Since that time, Dan has focused on applying data and analytics to strategic fundraising issues in support of GG+A's evidence-based approach to counsel. His work has taken him to clients in all 50 states and 8 countries.

Since joining GG+A in 2000, Dan has become widely known for his expertise in market research, prospect research and management, annual giving, ratings and analytics, grateful patient programs, giving societies, campaign planning, and metrics.

Previously, Dan served as a United States Peace Corps volunteer in the Slovak Republic. Dan is an alumnus of the University of Illinois at Chicago, where he graduated with college honors and highest distinction.

Areas of Expertise

Market research
Surveys
Analytics, scoring, and ratings
Prospect research and prospect management
Data Visualization
Major gift officer portfolio management
Donor relations and stewardship
Metrics

Client List

- American Cancer Society
- American Civil Liberties Union
- American College of Financial Services
- American Committee for the Weizmann Institute of Science
- Aquarium of the Pacific
- Arkansas Tech University
- Art Institute of Chicago
- Barack Obama Foundation
- California Institute of the Arts
- Cardiff University
- Carnegie Hall
- Carnegie Mellon University
- Celebrity Series of Boston
- Chamber Music Society
- Chicago Botanic Garden

- Chicago Council on Global Affairs
- Colby College
- Columbia University
- Cornell University
- Covenant House
- Curtis Institute of Music
- Dartmouth University
- Drexel University
- Durham University
- Fidelity Foundation
- Geffen Playhouse, Los Angeles
- George Mason University
- Gonzaga University
- Hebron Academy
- Hobart and William Smith Colleges
- Holderness School
- Horace Mann School
- The Hotchkiss School
- The Huntington Library, Art Collections, and Botanical Gardens
- Iowa State University Foundation
- John G. Shedd Aquarium
- Keck Medicine of the University of Southern California
- Kent Denver School
- Knox College
- La Salle University
- Lincoln Center for the Performing Arts
- The LIVESTRONG Foundation
- Loma Linda University Health
- Loomis Chaffee School
- Los Angeles Philharmonic
- Loyola University Maryland
- Make-a-Wish Foundation of America
- University of Maryland
- Medical and Health Sciences Foundation
- Memorial Hermann Foundation
- Missouri State University System
- Museum of Contemporary Art
- Museum of Fine Arts, Boston
- University of Notre Dame
- National Air and Space Museum
- The National Ballet of Canada
- Nevada Museum of Art
- New York Philharmonic
- The Newberry Library
- Northeastern University
- Northwell Health Foundation
- The Ocean Conservancy
- Oklahoma State University Foundation
- Olin College of Engineering
- Oregon State University
- Peddie School
- Pennsylvania Ballet
- Saint Mary's College of California
- Saint Mary's Doran Foundation
- Saint Mary's School
- San Francisco Museum of Modern Art
- Scripps College
- Smithsonian Institution
- Teachers College, Columbia University
- The University of Texas at El Paso
- The University of British Columbia
- The University of Mississippi
- The University of Queensland
- Trinity College
- United States Naval Academy Foundation
- University of California, Berkeley
- University of California, Irvine
- University of California, Los Angeles
- University of California, San Francisco
- University of Chicago
- University of Chicago Medicine
- University of Colorado Foundation
- University of Florida Foundation
- University of Illinois Foundation
- University of Leeds
- University of Massachusetts Boston
- University of Missouri-Columbia
- University of Nebraska Foundation

- University of Pittsburgh
- University of Rochester
- University of South Carolina
- University of Southern California
- Utah Shakespeare Festival
- Vanderbilt University
- Washington University in St. Louis
- Williams College

Jim McKey

Jim McKey, Practice Area Leader for Independent Schools and Senior Vice President, brings **more than 25 years of experience in fundraising and administration for academic institutions**. Jim has extensive experience in **planning and managing campaigns; evaluating current programs; defining successful donor strategies; working with governing boards; and identifying opportunities and solutions for growth**.

Before joining GG+A full-time, Jim served for 12 years as **Vice President for Institutional Advancement at Earlham College**, where he managed a staff of 25 and oversaw development, alumni relations, foundation relations, and communications. Under his leadership, Earlham completed a comprehensive campaign that raised \$68 million, surpassing its \$60-million goal. Jim also served as Director of Advancement for George School, where he managed a staff of 13 and a campaign that exceeded its \$28-million goal.

Jim joined GG+A in 2015 and began serving a diverse set of clients, mostly in independent schools and higher education. His work is especially focused on helping organizations at all stages of campaigns—from early planning through execution and on to celebration and stewardship. His clients benefit from his expertise and insights into strategies for top donors and key volunteers.

Under Jim's leadership, George School received the Council for Advancement and Support of Education (CASE) Circle of Excellence Award for overall fundraising performance. His cultivation and stewardship of the school's lead donor paved the way for a \$128-million gift, **the largest gift ever to an independent school**, and a subsequent bequest of \$30 million. Earlier, Jim was Director of Development at Friends' Central School and served as **President of the Association of Delaware Valley Independent Schools**.

Jim began his career as an educator in independent schools, teaching history and providing counseling to college-bound students. A career transition led him to the banking industry, where he served the credit and public finance needs of schools, colleges, museums, and hospitals at First National Bank of Chicago. Jim's previous consulting engagements included providing campaign counsel to numerous Friends schools and Quaker organizations.

He has served on the boards of the **Friends Council on Education and the Richmond Art Museum**. Jim holds a bachelor's degree in history from Earlham College and a master's degree in teaching from Brown University.

Areas of Expertise

Planned giving
Major gifts
Planning and managing
Campaigns
Development program review
Volunteer engagement/management

Donor strategies
Governing boards
Senior management
Independent schools
Higher education

Client list

- American College of Financial Services
- Collegiate School (VA)
- Dana Hall School
- Dartmouth College
- DePauw University
- Durham Academy
- Episcopal Academy
- Friends' Central School
- Friends School of Baltimore
- Greenhill School
- International School of Indiana
- Kenyon College
- Latin School of Chicago
- London School of Hygiene & Tropical Medicine
- Loomis Chaffee School
- Macalester College
- Miami University
- Middlebury College
- Montclair Kimberley Academy
- National Cathedral School
- Polytechnic School
- Prince's Trust International
- San Francisco Friends School
- Sidwell Friends School
- Solar Impulse
- The American Association for the Advancement of Science
- The University of Toledo
- The University of Vermont
- Tower Hill School
- University of Chicago Laboratory Schools
- University of Dayton
- University of Minnesota
- Upper Canada College
- Vanderbilt University
- Westtown School
- William Penn Charter School

Anne Meyers Hobbs

Anne Meyers Hobbs, Consulting Vice President, brings more than 28 years of advancement expertise to the firm, specializing in the **independent school sector**.

Anne has been the Director of Development at the **Latin School of Chicago** for the past ten years, where she's established successful partnerships with **volunteers** and **faculty leaders** and executed a wide range of **donor relations** and **fundraising programs**.

Overseeing a team of nine professionals, Anne has led successful **capital campaigns** ranging from \$18M to \$50M, tripled the School's **endowment** in the last five years, and overhauled programs and structures to facilitate **cross-functional collaboration and alignment**. Previously, she served as the **annual fund director** and senior development officer.

While at Latin School of Chicago, Anne served as the Development Officer at **High Jump**, where she led all fundraising endeavors for the **academic enrichment program, including annual giving grants, event management, gift processing, and data management**. Anne was an integral part of High Jump's launch as one of the most successful enrichment programs in the country. Earlier in her career, Anne worked at **SGA Youth and Family Service** as the acting director of development and development assistant.

Under her leadership, Latin was a two-time recipient of the prestigious **CASE Educational Fundraising Award**, first for Overall Improvement in 2014 and then Overall Performance in 2015.

Anne graduated from Emory University with a B.A. in Liberal Studies and minors in anthropology and history in 1988.

Areas of Expertise

Endowment
Independent Schools
Campaigns
Annual Funds

Jeff Nearhoof

Jeff Nearhoof, Senior Vice President, brings over **30 years of experience leading advancement and development programs** in both public and private universities. Jeff has extensive experience in **prospect and donor cultivation and management, data analysis, strategic thinking, and employee management and mentoring**. He brings a depth of experience spanning multiple industries.

Prior to joining GG+A, Jeff was Vice Chancellor for Advancement at University of Illinois at Chicago (UIC) as well as Senior Vice President at the University of Illinois Foundation (UIF). In these roles, Jeff was responsible for leading all aspects of UIC advancement and implementing philanthropic initiatives as directed by the Chancellor. He also coordinated the priorities of UIC leadership and deans as well as volunteer and alumni relations, and oversaw a team of 90-plus development and alumni relations officers. In the fall of 2017, Jeff was responsible for the launch of a comprehensive campaign with a \$750-million goal.

At the same time, he launched the University's first UIC Alumni Association and was responsible for managing all aspects of alumni communication and engagement. During the quiet and public phases of the campaign, UIC realized an increase in leadership level asks and dollars raised each consecutive year. Previously, Jeff served as Associate Dean for Development/Executive Director of the Feinberg Campaign after being promoted from Assistant Dean for Development and Director of Individual Giving at the Feinberg School of Medicine, Northwestern University.

Jeff led Feinberg's effort to implement a grateful patient giving program and, as Executive Director, coordinated and led all aspects of the Feinberg campaign planning activities in coordination with the University's development leadership and leadership at its affiliated hospital. Before his work at Northwestern University, Jeff served in advancement roles at University of Michigan School of Music, Theatre and Dance, Case Western Reserve University College of Engineering, the Cleveland Institute of Art, Lyric Opera Cleveland and Cleveland Ballet.

Jeff holds a Bachelor of Science in Marketing from Bowling Green State University.

Areas of Expertise

Data analysis
Donor cultivation
Employee management and mentoring
Prospect management

Client List

- Association of American Medical Colleges
- Lyric Opera of Chicago
- Montefiore Medical Center
- Rush University Medical Center
- Dana-Farber Cancer Institute
- City of Hope
- University of Miami
- Fourth Presbyterian Church
- UCLA Jonsson Comprehensive Cancer Center

Amy Parker

Amy Parker's fundraising career began when she served as an undergraduate student representative for her university's capital campaign. Over two years, she spoke at campaign events, participated in donor visits with the university's president and advancement leadership, and saw first-hand the importance of **volunteer engagement**. This formative experience sparked her interest in the fundraising profession and led to advancement leadership positions at some of the country's most prestigious cultural institutions.

At GG+A, she works as a Consulting Vice President, supporting clients with ongoing strategic counsel that covers the full range of advancement practice areas. For her first two years at GG+A, Amy was based in **Hong Kong**, working remotely with clients around the world, from Finland, Canada, and Australia.

Prior to joining GG+A, Amy served the **Smithsonian Institution** for eight years, first as Director of **Individual Giving** for the National Museum of American History and later as Associate Director for **Advancement and Strategic Planning** at the National Portrait Gallery, where she provided leadership on fundraising, strategic planning, board development, and special events. Joining the Smithsonian during its \$1.5 billion fundraising campaign, she served as co-chair of the campaign's roles and responsibilities workgroup, additionally helping form the institution's campaign guidelines for **staffing, prospect management**, and philanthropic financial support.

In her earlier role as Director of Individual Giving at **The New York Public Library**, she led the **major gifts** program's transition into a relationship management model, implementing structured **moves management** practices and **performance metrics**. Amy also served the **University of North Carolina at Chapel Hill's Kenan-Flagler Business School** in the role of Director of **Donor Relations**, a newly created position based on her vision for an **endowment stewardship** program that inspired continued giving.

With a current client, Amy has been working on line-by-line **portfolio reviews** to help gift officers think through the next steps in light of the current climate and its challenges, to help them **sustain fundraising** through the **COVID-19 Crisis**.

Amy holds a Master of Arts in English, Literary and Cultural Theory from Carnegie Mellon University, and a Bachelor of Arts in English and Cultural Studies from Chatham University. She has held the Certified Fundraising Executive (CFRE) credential since 2009, presenting on the topics of **major gifts, board engagement**, and **international advancement** at a variety of professional conferences and events around the world.

Areas of Expertise

Individual Major Gifts

Board Development

Arts and Culture

Deepening Engagement with Major Gift Prospects and Managing Them for Future Success

Client list

- American Association for the Advancement of Science
- Cancer Research UK
- Hong Kong Baptist University
- Hong Kong University of Science and Technology
- McGill University
- National Cathedral School
- Polytechnic School
- Rice University
- Smithsonian Institution, National Museum of Asian Art
- Smithsonian Institution, National Portrait Gallery
- University of Alberta
- University of the Arctic
- University of Melbourne
- University of Melbourne, Faculty of Medicine, Dentistry and Health Sciences
- University of Wisconsin Foundation and Alumni Association
- Victoria University of Wellington

Stacia Pelletier

Stacia Pelletier, Consulting Vice President, brings 20 years of experience in **higher education, academic executive administration**, and **academic medicine** fundraising to GG+A. Currently the chief writer to the president of **Emory University**, Stacia offers a unique perspective at the intersection of strategic communications, executive positioning, and academic medicine.

Prior to moving to the president's office, she served as senior director of development for brain health and the neurosciences within **Emory's Woodruff Health Sciences Center**. There she managed a team of 8-10 that consistently exceeded its year-to-year major gift goals. She solicited and closed gifts including in the \$1-million to \$15-million range across Emory's health care and medicine operations.

Stacia brings a uniquely relational perspective to her work. An experienced teacher and collaborator, she holds a master's degree and a Ph.D. from Emory University in the history of religion and has taught courses at several universities. An accomplished and nationally recognized novelist, Stacia is the author of *Accidents of Providence* and *The Half Wives*. She understands that the most successful fundraising programs rely on creativity and innovation to differentiate themselves from others, and she knows that building programs that can incorporate creativity requires authentic relationships forged over time and with respect and candor.

Stacia lives in the north Georgia mountains with her husband and is actively engaged in environmental and conservationist efforts in the Appalachian region.

Bob Ramin

Bob Ramin, Senior Vice President, has spent his career directing and developing institutions on behalf of **animal welfare**, combining his breadth of fundraising and philanthropic knowledge with his passion for **wildlife conservation** efforts. Bob's 30 plus years in the **voluntary sector** have been focused on building organizational capacity and **transforming members into major donors**. Before joining GG+A, Bob was the President and CEO of **Washington Animal Rescue League**, where he oversaw a comprehensive medical center, state-of-the-art shelter, and food bank. He also implemented programs in **humane education**, behavior, and training. With Bob's guidance, the organization achieved and increased its fundraising goals, engaged and enhanced key **major donor relationships**, and saw an increased emphasis on **planned giving**.

From 2002 to 2012, Bob held several leadership roles at the **National Aquarium's Baltimore and Washington, DC**, locations. In his final role as Vice President and Chief Development Officer, Bob oversaw all fundraising and membership staff, directed all federal relations and served as Executive Director of National Aquarium's Washington facility. As Vice President of Development and Marketing for the **African Wildlife Foundation**, Bob directed all aspects of fundraising, marketing, and communications for the first conservation organization to work exclusively in Africa. He supervised all public relations materials for the Foundation, including overseeing the Foundation's quarterly publication, African Wildlife News. Additionally, he directed the Foundation's first comprehensive **awareness and brand-building** initiative.

Bob has presented at numerous nonprofit fundraising conferences, including the Booz Allen Hamilton Nonprofit Speaker Series, the Annual Bridge to Integrated Marketing and Fundraising Conference, the Association of Fund Raising Professionals International and Canadian Annual Conferences, and the Association of Zoos and Aquariums Annual and Regional Conferences. In addition, over the last 5 years he has presented at workshops in China on **fundraising, marketing, sponsorship, and management to wildlife administration and zoological leadership**.

An active **community volunteer**, Bob serves as Advancement Chair and Executive Committee member for Our Lady of Good Counsel High School. He has served on the Campaign Committees of Family & Children's Service of Ithaca and the University of Maryland's College of Education, in addition to his many **alumni fundraising** roles for **Cornell University**. He holds a Bachelor of Arts in Government and a Master of Business Administration with a concentration in public administration and management from Cornell University, as well as a Master of Arts in Social Foundations of Education from the University of Maryland College Park.

Areas of Expertise

Arts and Culture
Zoological
Conservation
Strategic Planning
Major Gifts
Planned Giving

Client list

- Emory University
- The Maryland Zoo
- Montgomery College
- Museum Kunst der Westküste
- National Audubon Society
- The Phillips Collection
- Rodale Institute
- Smithsonian Institution
- Tuerk House
- University of Maryland College Park
- The University of North Carolina at Greensboro
- University of Virginia
- Wild Earth Allies

Royal Rarick

Royal Rarick serves as a Consulting Associate in the **Analytics Practice Area's Survey Lab**, helping clients gain valuable insights from constituents to align donor aspirations with desired philanthropic outcomes.

Royal brings a wealth of experience delivering strategic business development projects for clients, including survey development, data collection and analysis, and communications. Before joining GG+A, Royal served as a Senior Associate in the **People Analytics Practice of PricewaterhouseCoopers** in Washington, D.C., where he developed and led client-focused strategic organizational planning projects.

Royal conducted all facets of stakeholder analysis for both public and private sector clients, including coordinating focus groups, materials collection, qualitative analysis, designing and writing reports, and overseeing the work of associate-level project support staff. He also led project teams in the delivery of **customized organizational research** survey programs to help further client missions, including designing survey questionnaires, performing **qualitative and quantitative data analysis**, and producing and presenting executive-level reports.

Prior to working in Washington, D.C., Royal worked for nearly 10 years with Chicago-based firms in a number of organizational development and operational roles, applying his **expertise in survey development** and administration. Most recently, as a Senior Analyst with Willis Towers Watson, Royal led project teams in designing, conducting and analyzing large-scale, customized organizational performance and culture surveys, producing client-facing reports that emphasized actionable data analysis.

Royal holds a Master of Arts in Industrial/Organizational Psychology from The Chicago School of Professional Psychology and a Bachelor of Arts from the University of Nebraska where he majored in both Psychology and Communications.

Areas of Expertise

- Grateful patient and physician engagement review
- Program review
- Prospect management
- Portfolio analysis and training

Adrian Salmon

Adrian Salmon, Vice President, GG+A Europe, brings **20 years of direct-marketing fundraising experience** in the higher education, arts and culture, and wider nonprofit spheres.

His particular expertise includes direct mail fundraising, annual giving program management, and management of contributions from integrated mail and online appeals. Before joining GG+A in 2015, Adrian was Footsteps Fund Manager at the **University of Leeds**, where he dramatically **increased the University's number of donors**, annual giving income, and contributions from integrated mail and online appeals.

Adrian also **implemented an automated propensity scoring system**, the first to be used by a university in the United Kingdom, and designed and implemented the University's first dedicated 20-seat fundraising call center. Prior to joining the University of Leeds, Adrian served for more than nine years with The Phone Room Ltd. as Director of Client Services and as Head of TPR Education. He headed **numerous award-winning telephone campaigns** for nonprofit clients, including the National Galleries of Scotland, Symphony Hall Birmingham, and the Southbank Centre. He also established successful telephone fundraising campaigns for **University of Salford** and **Birkbeck, University of London**.

Adrian holds a Bachelor of Arts degree in English from the University of Cambridge and is a member of the Institute of Fundraising. Adrian serves on the Advisory Panel of Rogare, the new practitioner-focused fundraising think tank at Plymouth University's Centre for Sustainable Philanthropy.

Areas of Expertise

Digital Fundraising
Direct Marketing
Monthly Giving Programs
Staff and Volunteer Teaching and Coaching
Telephone Fundraising
Annual Giving
Benchmarking
Copywriting
Donor Retention and Loyalty
Social Media Fundraising

Client list

- Alder Hey Children's Charity
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Appalachian State University
- Aston University
- Cancer Research UK
- Cardiff University
- Carnegie Mellon University
- Center Theatre Group
- Dartmouth College

- Durham University
- Emory University
- ESADE Business School
- Heriot Watt University
- IE University
- IESE Business School
- King's College London
- KIPP Foundation
- New York Institute of Technology
- New York Institute Technology
- Northampton Community College
- Nova Southeastern University
- Parkview Health
- Pomona College
- Quinnipiac University
- Regent's University, London
- Seattle University School of Law
- The University of Sheffield
- University of Southampton
- The Sutton Trust
- University College Dublin
- University of Dundee
- University of Edinburgh
- University of Toronto
- University of Virginia
- University of Warwick
- Virginia Polytechnic Institute and State University

Jason Shough

Jason Shough, Vice President, provides **integrated communications counsel** and **responsive creative services** for clients in higher education, healthcare, and arts and culture. His expertise in cross-channel communications strategy, creative direction and verbal branding helps clients **activate their communities of supporters, energize their advancement programs, and build their philanthropic brands.**

His current work with GG+A clients includes vision and priority setting, case writing, campaign communications planning, institutional branding, strategic messaging, direct appeal copywriting, executive speechwriting, and message refinement via digital workshops with advancement communications teams.

Prior to joining GG+A, Jason was Associate Creative Director of copywriting at SimpsonScarborough, where he led cross-disciplinary teams in developing marketing campaigns and brand training programs for higher ed clients. He also created impactful brand messaging for more than 50 clients as a Senior Copywriter at two creative agencies: GSW Advertising and Ologie.

Earlier in his career, Jason served in multiple executive communications roles at The Ohio State University. First as a Speechwriter for the Office of the President, and later as Communications Director for the President Emeritus, he drafted remarks, editorials, tweets, digital stories, and press briefings to advance the university leadership's goals.

Jason holds a Master of Science in Journalism from Northwestern University and a Bachelor of Arts in English from The Ohio State University.

Areas of Expertise

Case for Support
Vision and Priority Setting
Communications Plan
Brand Identity

Client list

- American University
- Florida Atlantic University
- George Fox University
- Greenhill School
- Louisiana State University
- Siemer Institute
- Tecnológico de Monterrey
- Haas School of Business (University of California, Berkeley)
- University of Denver
- University of Toronto Faculty of Arts & Science
- University of Waterloo
- Taos Art Museum
- Southeast Missouri University
- Emanate Health (formerly Citrus Valley Partners)

Christine O'Neill Singer

Christine O'Neill Singer, Consulting Vice President, brings to the firm more than 40 years of experience in institutional advancement. She has held a wide array of leadership roles in the nonprofit sector, serving **cultural organizations, higher education and global conservation**. Her expertise in **integrated resource development strategy and management** includes all areas of fundraising with an emphasis on **individual philanthropy, volunteer leadership development, campaign planning and execution, team capacity building, and advancement support services**.

Prior to joining GG+A, Chris served as Vice President for Individual Giving at **World Wildlife Fund**, the world's largest conservation and environmental organization. Chris envisioned, built and provided **strategic and operational leadership** for a comprehensive program to develop relationships leading to significant philanthropic support for the six pillars of WWF: **climate, food, fresh water, wildlife, forests and oceans**. Working with senior Board leadership and all staff across the U.S. organization, Chris **built a culture of philanthropy** to re-imagine and develop a ten-year strategy toward the framework **for a multi-billion dollar campaign**.

Over the years, Chris served in several roles at the **University of Chicago**. As Associate Vice President for Alumni Relations and Development, Chris led the 160,000 member Alumni Association of the University where she **rebuilt senior volunteer leadership structures, expanded and reinvigorated a global volunteer network, strengthened internship and alumni mentoring programs and raised the effective profile of University alumni within the highest levels of University leadership**. Chris then continued as Senior Advisor and Executive Director, **Harper Society**, where she worked to ensure the meaningful involvement of donors of extraordinary gifts multi-million dollar gifts and of emeriti trustees. Earlier in her career at Chicago, Chris headed the **Alumni Fund** of the University.

Additionally, Chris has served as the Vice President for Development and Marketing at the **Lincoln Park Zoological Society**, and Vice President for Development at the **Art Institute of Chicago**, providing strategic direction for advancement, staff development and mentoring, and budget planning, and responsibility for fundraising, gift planning, and advancement services for each institution.

Chris has worked with the **University of Toronto** major gifts staff, **teaching and coaching** both in a seminar setting and individually in person and virtually. Chris also specializes in **Strategic Planning Study** interviews, most recently at the **Lyric Opera of Chicago** and **Temple University**. Chris offers the full range of her long and successful experience meeting challenges of all kinds, at all levels, in all areas of Advancement in partnership with top institutional officers and Board members as well as key staff and volunteer leaders, particularly in the cultural, conservation and higher education sectors.

Chris hold a B.A. from Michigan State University and did graduate work at the University of Chicago.

Areas of Expertise

Cultural Organizations
Higher Education
Global Conservation
Volunteer Leadership Development

Campaign Planning and Execution
Major and Principal Gifts Structure and Strategies
Vision and Priority Setting
Staff Teaching and Coaching

Client list

- University of Toronto
- Lyric Opera of Chicago
- Temple University

Eric Snoek

Eric Snoek, Vice President, brings to the firm 30 years of development and advancement experience within **higher education and independent educational** institutions. He has extensive experience in individual giving; advancement planning and management; capital campaigns and campaign planning; training development staff and Board members; engagement programs; stewardship programs; moves management; and volunteer management.

Eric works with clients to build sustainable fundraising success in campaigns and in ongoing development efforts, serving as a consultant, coach, or in an interim management role. Specifically, he has experience in **evaluating contemporary advancement programs**; identifying opportunities and strategies for growth; organizing fundraising priorities; guiding the planning and execution of **major campaigns**; and managing all facets of advancement programs, including **principal and major gifts**, planned giving, annual giving, alumni relations, and stewardship. His fundraising and consulting experience makes him particularly qualified to understand the distinct culture and opportunities at a wide range of institutions, including **complex public universities, private colleges, independent schools, hospitals and health care systems, and cultural institutions**.

Before joining GG+A, Eric served as Vice President, Advancement, for **Interlochen Center for the Arts** in Michigan, where he led the effort to create a unified advancement program with expanded outreach, engagement, and fundraising activities. Interlochen secured record levels of support from alumni, parents, and patrons under his leadership.

Prior to this role, Eric served as Vice President for College Advancement at **Wheaton College in Massachusetts**, where he provided leadership and vision for all aspects of Wheaton's external relations department, which included alumni relations and annual giving, development, advancement services, communications, research, and events and conferences. Although in a period between campaigns, his emphasis on a coordinated and systematic advancement effort led Wheaton to record-setting annual fund and conference revenue while capital giving was sustained at campaign levels.

Before joining Wheaton College, Eric served as **Director of Development at Bucknell University**, playing a major role in the leadership of *The Bucknell Campaign*, which raised \$188.3 million against a \$150 million goal.

Eric has also served as Director of Annual and Leadership Giving at the University of Massachusetts Amherst, where he built a personal solicitation team to enhance the existing phone and direct mail effort, exceeding program goals. He began his advancement career as a staff member on the University's Alumni Relations team.

He has also provided pro bono fundraising consultation to several nonprofit organizations and served as a board member in two districts of the Council for the Advancement and Support of Education (CASE).

Eric holds a bachelor's degree in communication studies from the University of Massachusetts Amherst.

Areas of Expertise

Principal and Major Gift Strategy
Portfolio Management
Campaign Readiness Assessment
Campaign Feasibility Study
Program Design
Gift Officer Training
Gift Officer Management
Stewardship
Ongoing Counsel

Client list

- American Heart Association
- AMITA Health
- The Blake School
- Boy Scouts of America
- Boys Town
- Bucknell College
- Carnegie Library of Pittsburgh
- Greenwich Country Day School
- Chicago Lyric Opera
- The Children's Museum of Indianapolis
- Cincinnati Museum Center
- Colby College
- Colgate College
- Cornell College
- Curtis Institute of Music
- Dartmouth College
- Da Vinci Science Center
- DePaul University
- Evelina London Children's Hospital
- Greenwich Country Day School
- Hobart and William Smith Colleges
- Keck School of Medicine of USC
- Kenyon College
- Kings College London
- Knox College
- Ann & Robert H. Lurie Children's Hospital of Chicago
- Macalester College
- Mary Bird Perkins Cancer Center
- Medical University of South Carolina
- McGill University
- McLaren Northern Michigan Foundation
- Memorial Hermann Foundation
- Mount Allison University
- Our Lady of the Lake Regional Medical Center Foundation
- University of Minnesota Foundation
- University of North Carolina at Chapel Hill
- University of North Carolina School of the Arts
- *The Ohio State University*
- *University of Rochester*
- University of Toronto
- San Francisco Museum of Modern Art
- Sarasota Orchestra
- Seton Hall University
- University of Waterloo
- West Virginia University

Patricia Watson

Patricia Watson, Senior Vice President, utilizes her more than 40 years of business experience in providing best practices counsel for all facets of advancement to clients. She specializes in change management, strategic planning, operational execution and talent development and management. Her **expertise in Principal and Major Gifts fundraising** are especially impactful in shaping strategies to achieve campaign and annual goals.

Before joining GG+A, Patricia **led Brown University's Advancement division** and built an enterprise capable of fulfilling Brown's aspirational goals set forth in its "Building on Distinction" strategic plan. As Senior Vice President, Patricia instituted industry best practices as she established or restructured the University's fundraising, engagement and operational programs. She developed a culture of collaboration and transparency necessary to launch the **\$3 billion "BrownTogether" campaign** in October 2015. Patricia's strategic planning and campaign execution put Brown on an upward trajectory to increase and sustain private support from \$200 million to more than \$300 million in New Gifts and Commitments and to successfully complete the campaign.

Before her work at Brown, Patricia held several senior development positions with **Cornell University**. As Senior Associate Vice President of Alumni Affairs and Development, and as Associate Vice President of University Development from 2009 to 2012, Patricia executed a division-wide restructuring that transformed the Alumni Affairs and Development division from a centrally organized fundraising and engagement operation to a hybrid structure. She was also instrumental in phasing out the \$4 billion "Far Above" campaign to better position Cornell for its sesquicentennial in 2015, and she helped relaunch and rebrand the campaign in October 2011 with a new goal of \$4.75 billion.

During her tenure with Cornell, Patricia also served in the roles of Associate Vice President for Development and as Director of College & Unit Alumni Affairs and Development. She also participated on a number of University development committees, and participated in **GG+A's Advanced Leadership Forum** and CASE Peer Review Program.

Additionally, she formerly served as **Development Director**, as well as Assistant Dean for College Advancement for the L.C. Smith College of Engineering at Syracuse University, overseeing all aspects of the college's relations with alumni, corporations, foundations and community organizations to **secure financial support for faculty and students**.

Patricia previously worked for several years as a senior manager in design, manufacturing, and consulting engineering firms. She utilized this experience to oversee the **implementation of a regional job-creation strategy** for an economic development agency in upstate New York. Before transitioning to the private sector, she spent more than 20 years as a professional dancer, choreographer, and instructor.

Patricia holds a Master of Arts in Public Administration from Syracuse University Maxwell School of Citizenship and Public Affairs and a Bachelor of Science in Design and Environmental Analysis from Cornell University College of Human Ecology. She also serves on the Board of Directors of the American Museum of Fly Fishing and on the Board of Governors of the Narragansett Boat Club.

Areas of Expertise

Change Management
Identifying Resource Requirements
Operational Execution
Strategic Planning
Talent Management

Megan C. Williamson

Megan C. Williamson currently serves GG+A as a Consulting Associate. Since 2014, she has supported and **provided counsel to more than 150 clients** across the firm's sectors and industries. Her work at the firm has focused on alumni relations, communications and marketing, strategic planning, and the structuring and resourcing of development programs.

Prior to joining the firm, Megan worked as the Director of **Individual Giving at Housing Opportunities for Women**, where she developed and implemented strategies in direct mail, e-solicitation, special events, communications, website management, and social media. In her role, she **increased annual event revenue by 22%**, planned and produced all development and organizational publications, and worked as part of the leadership team on key strategic issues, including organizational merger plans.

Previously, Megan served as a **development and public relations professional** with a focus on nonprofit administration, volunteer management, and board relations for Old St. Patrick's Church; Project Exploration; Girl Scouts – Prairie Winds, Inc. (Girl Scouts of Chicagoland and Northwest Indiana); and Glenwood School for Boys and Girls (Glenwood Academy).

Megan holds a Bachelor of Arts degree in journalism and mass communication from Drake University and a Master of Public Administration degree from the University of Illinois at Springfield. She has also been a Certified Fund Raising Executive (CFRE) since 2011.

Areas of Expertise

Alumni Engagement
Higher Education Fundraising
Human and Social Services
Membership Programs
Voluntary Sector
Volunteer Management
Youth & Family Services

Client List

- 360 Youth Services
- Alpha Phi International Women's Fraternity
- AltaMed Health Services
- American School of Milan
- American University
- Anderson University
- Antarctic Science Foundation
- Aston University
- Bakersfield Christian High School
- Brandeis University
- Brandman University
- Buckingham Browne & Nichols School
- Capital University
- Cardiff University
- Carnegie Mellon University
- Case Western Reserve University
- The Catholic University of America
- Colgate University
- College of DuPage Foundation
- College of Saint Elizabeth
- Concordia University
- Cornell College
- Cornell University
- Creighton University
- Dana Hall School
- Dave Thomas Foundation for Adoption

- Delaware Valley Friends School
- DePaul University
- Drexel University
- Duke University
- Emanate Health (Citrus Valley Health Foundation)
- Emory University
- Englewood Health
- EP Nuffic
- Farmer School of Business, Miami University
- Florida Atlantic University
- Greenwich Country Day School
- Grenoble École de Management
- Hebrew Union College
- Hobart and William Smith Colleges
- Hood College
- Houston Methodist Hospital
- University of Idaho
- IESE Business School
- Illinois Mathematics and Science Academy
- IMD Business School
- Indiana University Alumni Association
- Indiana University of Pennsylvania
- INSEAD
- International Eczema Council
- Kenyon College
- Kiel University
- King's College Cambridge
- King's College London
- Knox College
- KTH Royal Institute of Technology
- Kutztown University of Pennsylvania
- Lehigh University
- Loyola Marymount University
- Macquarie University
- McGill University Health Centre Foundation
- McMaster University
- University of Miami
- Milwaukee Art Museum
- Mount Allison University
- Museum Kunst der Westküste (Föhr, Germany)
- New Mexico State University
- Northwestern Alumni Association
- Nova Southeastern University
- University of Melbourne Faculty of Medicine Dentistry and Health Sciences
- Occidental College
- Oregon Health & Science University
- Oregon State University
- Pennsylvania State University
- Pepperdine University
- Population Council
- Rice University
- Rowan University
- Saint Joseph's University
- San Diego Zoo
- San Francisco State University
- Scripps College
- Sidwell Friends School
- Southeastern Louisiana University
- Temple University
- Texas Christian University
- The Cambridge School of Weston
- The Episcopal Academy
- The Jackson Laboratory
- The Rockefeller Foundation
- The University of British Columbia
- The University of Memphis
- The University of Queensland
- The University of Sheffield
- United Way of Greater Cincinnati
- United Way of Miami-Dade
- University College Dublin
- University of Alberta
- University of Arizona Foundation
- University of California, Los Angeles
- University of California, Office of the President
- University of California, Santa Barbara
- University of Cambridge
- University of Dayton
- University of Florida Foundation
- University of Illinois Alumni Association
- University of Indiana - Purdue University Indianapolis
- University of Manitoba
- University of Maryland, Baltimore County
- University of Maryland Medical Center Foundation
- University of Maryland, Robert H. Smith School of Business
- University of Massachusetts Amherst
- University of Melbourne
- University of Phoenix
- University of Rochester

- University of Southampton
- University of Toronto
- University of Wisconsin
- University of Wisconsin Foundation
- Vanderbilt University
- Victoria University of Wellington
- Villanova University
- Virginia Polytechnic Institute and State University
- Wageningen University & Research
- Washington State University Foundation
- West Virginia University Foundation
- Western Kentucky University
- Winston Churchill Foundation of the USA
- Yale University

Nicole Wilson

Nicole, Consulting Vice President, is a skilled and passionate development professional having worked for the **Metropolitan Museum of Art**, one of the world's largest cultural institutions. At the Museum, she served as an Associate Development Officer on both the Capital Campaign and the Foundation and Government Giving teams, identifying prospective **foundations** and government entities and working across departments on numerous **sophisticated communications** including successful proposals to support exhibitions, conservation, and educational programming.

She also served as an independent contractor for the Museum, providing assistance to different areas of the Development Office, including the **Annual Appeal, Foundation Giving, and Corporate Giving**. Nicole has vast knowledge of ancient history and art and has been an Instructor for courses on Greek and Roman mythology, ancient Greek history, and Roman art and architecture at the **University of Calgary**. From 2012-2014, she was a Mellon/American Council of Learned Societies Public Fellow at the Metropolitan Museum of Art.

Nicole earned her Ph.D. and her M.A. in Greek and Roman Studies from the University of Calgary and her B.A. from Loyola Marymount University in History and Classical Civilizations.

Areas of Expertise

Arts and Culture
Corporate and Foundation Relations
Annual Giving
Communications

David C. Wu

David C. Wu, Consulting Vice President, brings more than 30 years of professional experience in development and fundraising. David currently serves President of the **San Diego Zoo Foundation** where he provides overall leadership for the **Development** and **Membership** teams that raise over a \$100 million annually. Prior to this appointment, he served as Chief Advancement Officer at **Woodland Park Zoo**, where he provided leadership for a highly integrated group of professionals in the fields of **communications, development, membership, marketing, and government relations**.

David previously served as Chief Development Officer for **PATH**, an international nonprofit that transforms global health through innovation. In this role, he led PATH in achieving its first \$125 million campaign and **increased private support by 250% in four years**. As the Associate Vice President for Campaign and Development Programs at the **University of Washington (UW)**, he worked closely with the president, provost, and other development staff and volunteers to provide leadership and direction for a comprehensive capital campaign with a working goal of \$2 billion over seven to eight years. He was also responsible for leading and managing university-wide campaign and development programs, which included campaign programs (**campaign operations, prospect management tracking**), individual gift programs (**principal and leadership gifts, regional and international programs, planned giving**), and **corporate and foundation relations**.

Prior to this, David served as Acting Vice President for Development and Alumni Relations at UW. In this position, he was responsible for providing overall leadership and direction for UW's comprehensive campaign, as well as its development and alumni relations staff. David created **solicitation strategies for \$5 million to \$100 million gifts** and restructured the alumni and development senior management team to respond to the needs of the organization during the **campaign planning and leadership transition**.

During the seven years prior to this appointment, he served as Assistant Dean for Development and External Affairs at **UW College of Arts and Sciences** and was a member of the College's executive committee. David was responsible for leading the College's **development, alumni relations, and communications programs**, with the goal of maximizing fundraising and external relations opportunities. He was instrumental in developing and implementing the College's first **strategic planning initiative**, and he managed the growth of the department from seven staff members to 23. Prior to that, David also held development positions with **Seattle University**, the **University of California, Los Angeles**, and **Bowling Green State University**.

David has been a member of both the Council for Advancement and Support of Education (CASE) and CASE District VII Board of Trustees. He served as a CASE faculty member for the Summer Institute for Fundraising at Dartmouth College and Fundraising for Newcomers. He also has been a Board Member for the National Society of Fundraising Executives, Seattle Chapter, and acted as a Visiting Expert with The Chinese University of Hong Kong Philanthropy/Fundraising Resource and Advisory Unit. He is currently on two boards: Global Impact and the Association of American Museums.

David received his bachelor's degree in political science from Virginia Tech, and his master's degree in higher education administration from Bowling Green State University.

Areas of Expertise

Higher Education
Zoological
Communications
Membership
Marketing
Government Relations
Prospect Management
Campaign Planning
Leadership Transition

Client list

- State University of New York (SUNY) at Buffalo
- University of California, Davis
- Eastern Washington University
- Emporia State University
- University of Iowa Health Sciences
- Miami University
- Oregon State University College of Business
- Providence St. Joseph's Foundation
- Rush University Medical Center
- The University of Texas, Medical Branch at Galveston
- Utah State University
- National Audubon Society

