



IA INSIGHTS

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OUR MISSION STATEMENT

To advance public understanding, build and strengthen lifelong relationships and enhance philanthropy in support of Southern Illinois University.

From the South Wing . . .

Change in the Works!!

Rickey N. McCurry



Change is on the horizon. I believe by now each and every one of you has heard about Saluki Way. I believe you have also heard that one part of the Saluki Way plan calls for an Alumni Center which will house the Division of Institutional Advancement. As exciting as that sounds for us, the reality is that it will take a few years before such a building can be built. In the meantime, we have a space need which must be addressed. We currently have a large part of our operation within houses on Oakland and Elizabeth streets which are not conducive to an office environment. We also have a large number of staff working in the basement of Colyer Hall which again is not the best environment in which to work.

Now that Student Health Services has moved into new facilities on Grand Avenue, we will be able to address some of our space needs. Through the efforts of Chancellor Wendler, we were able to secure space in Kesnar Hall, one of the buildings vacated by Student Health. By securing Kesnar, we will be able to move staff out of houses on Oakland and Elizabeth and into either Kesnar or Colyer. We will also be able to move staff from the basement in Colyer into areas that are more conducive to their needs.

Over the next couple of months, we will be working out all of the details, including where everyone will be located. We hope to have all of the moves completed by the end of the fiscal year. As with any change, we ask for your patience and cooperation as we work through this move.

A pearl of wisdom:

Change is inevitable

except from a vending machine.

~Robert C. Gallagher

Advancement Services

Twyla Adkisson-Peak and Annie Davis Weber

Researcher II Update

We have completed the interview process for filling the Researcher II position in the Research Department which has been vacant since June 2005 when Jeff Agne left. I am happy to announce that Annie Davis Weber, who has been working in our department as a Researcher I since the fall of 2004, will be taking on the responsibilities of the Researcher II position. I would like to thank everyone who has contributed their efforts to this process on the Screening and Selection committees.



Annie Davis Weber
Researcher II

Geographic Analysis

The Research Department, in conjunction with Information Systems and Development, has been working on developing a spreadsheet-based reporting format for conducting some national geographic analysis of potential prospect pools by constituency unit. Scott Kruger and Elizabeth Murphy in the School of Law have volunteered to serve as our "beta" unit for trying this analysis out. We provided their analysis to them in December and they are currently engaged in reviewing the information and providing feedback about the content and format of the report. We plan to roll the full description of these plans out to the full development

staff in an upcoming staff meeting. Our hope is that this will provide a very powerful and flexible tool for development officers to use in prospecting for their units.

APRA Conference – Data Mining

Annie Davis Weber attended the 18th Annual International Conference of the Association of Professional Researchers for Advancement (APRA) in August 2005 in San Diego. The theme of the conference was *The Campaign Trail: Research Rich, Fundraising Focused*. Many of the sessions that she had the opportunity to attend dealt with the subject of data mining. Annie has a background in statistical analysis that is a great asset in working with data mining, and she is currently working through some trainings in a very powerful US Census-based tool that is also a significant component in conducting data mining.

Data mining refers to the systematic searching of large stores of data to look for patterns that can be used to predict future behaviors or outcomes. It is a technique that has its roots in the business world, where it is used to predict all types of customer behavior. In the field of prospect research, data mining means looking for patterns in past donor and prospect behavior that

helps us identify possible future prospects or better qualify existing and future ones.

For major gift prospects, data mining can help establish a profile of what a major donor "looks like;" identifying the demographic and historical characteristics of a major donor. We can then take that profile and find people who are not currently major donors, but who match the profile. In theory, this method would provide another tool to identify new major gift prospects.

Data mining can also be used to predict such things as Alumni Association membership and Annual Fund giving. These techniques can help us identify segments of alumni who are more or less likely to join the Alumni Association or donate to the Annual Fund. With this information, resources can be focused on the most promising segments and diverted away from the least promising. When successfully implemented, data mining can help target efforts.

We are continuing to work toward planning and implementing some data mining of our database to further augment our efforts.

Alumni Services

Student Wins \$2800 Scholarship From SIU Alumni Assn.

Greg Scott

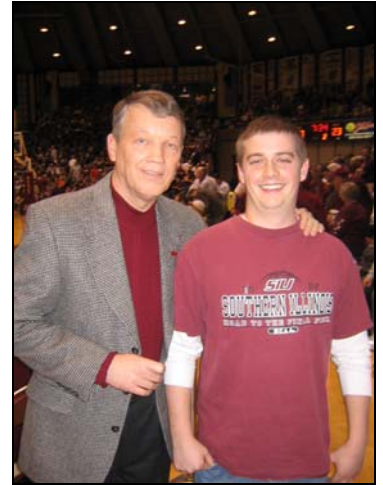
Jeffrey Doherty, a junior majoring in management at Southern, was the lucky winner of a \$2,800 scholarship drawing during halftime of the SIU-Creighton basketball game on Jan. 24. The scholarship, sponsored by the SIU Alumni Association, covers tuition and fees for fall semester.

Two hundred eighty-two students entered the drawing, 13 percent of which were members of the Alumni Association. Student members also received a coupon for a free hamburger and fries from the Student Center McDonald's, compliments of Short Enterprises and the SIU Alumni Association.

this program to extend appreciation to SIUC students. As an added bonus, a boisterous crowd of 9,004 watched the Salukis make history by defeating the Bluejays. With the victory, Southern broke the conference record for consecutive home conference wins with 42. It also extended the nation's longest overall home-court winning streak to 33 games.

Current SIUC students were eligible to register for the drawing prior to the game.

The Association served as game sponsor on the evening, and coordinated



Jeffrey Doherty (on right) pictured with Mr. Ed Buerger, Assoc. VC and Exec. Dir., SIU Alumni Association

Alumni Association Presents Textbook Scholarships to Three SIUC Students

Greg Scott

Three SIUC students won textbook scholarships as a result of their performance in the SIU Alumni Association Punt, Pass, and Kick Competition during the Saluki football season.

Participants who successfully completed the contest with a field goal won a textbook scholarship for the spring semester.

engineering technology.

This year's winners are Nicholas Modesto, a senior from Chicago majoring in administration of justice; Rasheed Muwallif, a senior from Peoria majoring in administration of justice, and Kyle Williams, a junior from Dixon majoring in

The textbook scholarships are sponsored by Pepsi, River Radio, Venegoni-Horrell Distributing, Regions Bank, *Southern Illinoisan* newspaper, Tres Hombres Mexican Restaurant, and the SIU Alumni Association. All competitors receive a T-shirt and a gift certificate, compliments of Tres Hombres Mexican Restaurant.

The Alumni Association, in conjunction with sponsors of its pre-game member tailgates, sponsored a Punt, Pass, and Kick Competition at halftime of each Saluki home football game.



Mr. Ed Buerger with students Kyle Williams (left) & Rasheed Muwallif (right)



Lucky student Nick Modesto

Alumni Member Appreciation Baseball and Softball Events Scheduled in April

Greg Scott

SIU Alumni Association members are invited to appreciation events in

conjunction with Saluki baseball and softball on April 15 and April 22 on

the SIUC campus.

The Saluki baseball team

Alumni Member Appreciation Baseball and Softball Events Scheduled in April (cont. from P3)

will host Creighton at Abe Martin Field. The first pitch is scheduled for 2 p.m. Alumni members will gather for a pregame tailgate beginning at 12 noon. Head coach Dan Callahan's team features a myriad of returning starters and many observers have the Salukis finishing as high as second in preseason Missouri

Valley Conference polls.

SIUC's softball squad will host a doubleheader against Creighton on April 22. The first game begins at noon. Members are invited to enjoy a 10:30 a.m. pregame tailgate at Rochman Field, Charlotte West Stadium. Head coach Kerri Blaylock's team has

advanced to the NCAA Tournament three consecutive years, and are favored to win their third consecutive MVC title this season.

For more information or to make reservations to attend these gatherings, call the SIU Alumni Association at (618) 453-2408.

Legacy Families Eligible for Scholarship

Greg Scott

The SIU Alumni Association's Roscoe Pulliam Memorial Scholarship Fund awards four scholarships valued at \$1,000 each. Applicants must be a child, grandchild, or sibling to an SIUC alumnus or alumna who is a current member of the SIU Alumni Association. Applicants must either be admitted or currently enrolled undergraduate

students who are registered for a minimum of 12 semester hours.

Applications and eligibility criteria are available at www.siualumni.com/pulliam. Materials must be postmarked by May 26 to be considered. Applicants must include a copy of their financial aid award letter and three letters of recommendation, one from

the relative who is an SIU Alumni Association member.

For more information, contact the SIU Alumni Association, Student Center, Southern Illinois University, Carbondale, IL 62901, call 618-453-2417, or visit www.siualumni.com/scholarships.htm.

Constituent Relations and Special Events

The Makings of a Campaign Kick Off Event

Cindy Miller and Penny Moon



How do you transform the Arena into something fitting a black tie affair? Constituent Relations found the many ways!!!

I decided it might be interesting, as well as good therapy, for me and my staff to review the November 4, 2005 kick off. It is always funnier when you look back!

Timing is everything they say in show business, and so it is in the event business. As you know, the campaign could not be announced until we had reached 50% of the goal; therefore, only preliminary

work could be done prior to knowing an exact date.

On July 2005, I met with Vice Chancellor McCurry and a date was finalized—November 4. I don't think I was breathing when I left the meeting, but Dr. McCurry showed no signs of distress, so I wasn't going to put my cards out there either. I met with my staff, developed a plan and away we went.

The Makings of a Campaign Kick Off Event (cont. from P4)

The rest of the highlights and details for the event are outlined beautifully from Penny Moon---and away she goes.....

As a newcomer to event planning, I could not have asked for a better opportunity to test my endurance and abilities than by working on the *Opportunity Through Excellence* Campaign event. Just as basic training never fully prepares a soldier for war, what knowledge and experience of event planning I possessed did not prepare me for the challenges leading up to November 4. I soon learned how little I knew, but I have definitely grown from this experience and feel more confident having been a part of this extraordinary undertaking. Wow!

Dwight D. Eisenhower once said, "In preparing for battle I have always found that plans are useless, but planning is indispensable." I quickly learned the importance of our planning but also experienced how plans never fully live up to expectations – "Murphy's Law." Some aspects of our planning played out beautifully while others met with unexpected barriers. The ability to recover and restructure our planning was critical in maintaining the level of quality and ambiance envisioned for the event.

Our first challenge was to design an invitation that would communicate the

formality of the event and maintain the campaign image. Our printing department with the assistance of their design unit took our ideas, added some polish and fine-tuned them until they successfully created an invitation that was unique and met with approval. They also assisted in maintaining the image throughout the reservation stations and dining area with signage, table cards, place cards, etc. Their contribution played an integral part in the aesthetics of the event and is a testament to the quality of resources we have on campus.

The next challenge was to determine whether or not the event could be held inside the SIU Arena. How do you transform the Arena into something fitting a black tie affair? With the assistance of Jason King, Matt Shackleton, Karen Frailey and Fir Sure, Etc. Florist, Traube Tent Company and Logic Systems the transformation was made possible.

Traube Tent Company erected two tents inside the Arena. The draping and chandeliers inside the reception tent provided an elegance that was foreign to the Arena. The dining tent was warm with color that complemented the campaign logo that was proudly displayed on video screens. The final results of Cindy's vision were somewhat altered but offered a dramatic setting in which to kick off the

campaign.

Keeping in mind that first impressions set the tone and mood, the decision was made to provide valet service where guests would exit their vehicles onto a red carpet. Skylights from Big Sky Balloons & Searchlights, Inc. added a Hollywood flair. Midwest Valet from St. Louis did an excellent job managing the flow of traffic of arriving guests. To capture the mood of the evening, photographers from Media and Communication Resources photographed the guests. The photographs enclosed in an etched-glass frame from Silkworm served as parting gifts for our guests.

I have heard that the one thing people will remember most about an event is the food. It was our good fortune to secure the catering services of Orlando's of St. Louis. They provided a meal that was not only pleasing to the eye but to the taste buds of the guests as well. Under the direction of Sam Orlando, the meal was prepared and served with an efficiency and professionalism that exceeded our expectations.

Musical entertainment for the evening featured the talents of our very own Professor and Pianist, Heidi Williams; School of Music students; and the Sharon Clark Band featuring Mel Goot. Professor Williams performed the works of Sergei Rachmaninoff,

"In preparing for battle I have always found that plans are useless, but planning is indispensable."

Dwight D. Eisenhower
34th US President
1953-1961

The Makings of a Campaign Kick Off Event (cont. from P5)

Prelude in D Major, Op. 23/4 and Prelude in B Flat Major, Op. 23/2 between remarks by Chancellor Walter V. Wendler and Vice Chancellor Rickey N. McCurry. With the assistance of Bob Weiss we were able to secure the talents of Jordan Doolittle, Boja Kragulj and Lindsey Smith who performed works by Mozart, Gounod, and Puccini during dinner. Immediately following the announcements of the \$10.2 million pledge from

John Simmons of SimmonsCooper and current campaign dollars and a dramatic confetti shoot, Mel Goot and his band took control of the evening.

Prior to coming on board as part of the CRSE staff, I was naïve to the volume of work that goes into the planning and orchestration of an event. This reflection does not fully capture the intricate detail work and hours that this event

entailed. The successful outcome would not have been possible without the visionary leadership of Cindy Miller and the collaborative efforts of the many talented people who contributed their time.

A special thanks to the: SIU Arena for donation of their facility and specifically Jason King for his support and services throughout the planning process and his assistance the evening of the event.



Nancy Martin, Constituent Development Officer, College of Science



Rebecca Stenhaus, Constituent Development Officer, College of Agricultural Sciences and Central Development Officer

[Greater detail on Nancy and Rebecca can be found on the Foundation website]

Development

Jeff Lorber

Since the last *IA Insights* update on staffing, we have completed several searches for major gifts positions. Hires are as follows:

- Nancy Martin, Constituent Development Officer, College of Science—Nancy assumed her new role in September. She is a graduate of SIU.
- Jill Beidler has joined the staff of Mass Communication & Media Arts; however, her focus is development — more specifically, Annual Fund.
- Tanna Morgan, Central Development Officer, SIU Foundation—Tanna has served as the Annual Fund Director for Student Affairs and Enrollment Management for a year and a half. Tanna began her new position January 3, 2006.
- Rebecca Stenhaus, Constituent Development Officer, College of Agricultural Sciences, and

Central Development Officer, SIU Foundation—Rebecca recently was a College Relations Senior Specialist with Abbott Laboratories in the Chicago area. She began her new position on January 3, 2006.

• Kevin Lister, Central Development Officer, SIU Foundation—Kevin has served as Director of Annual Giving for the SIU Foundation for nine years. Kevin began his new role January 17, 2006.

Additionally, we have changed the roles of three development staff. Jim Manis has moved from the College of Education and Human Services to serve in a special projects capacity with a current focus on corporate giving. Mike Murray will work with the College of Engineering to fill the vacancy left by Jerry Thomas' departure. On January 17th Nanditha

Balasubramanian, Assistant Dir. of Annual Giving, took on the role of Interim Director of Annual Giving until a search has been completed to fill the Director of Annual Giving position. Nanditha has been with the annual giving office as Assistant Director for 10 years.

In addition to the Director of Annual Giving position search, we anticipate conducting additional searches to fill the following vacancies:

- Assoc. Dir. of Institutional Advancement/Chicago Region
- Assoc. Dir. of Institutional Advancement/Education and Human Services
- Annual Fund Director/ Student Affairs and Enrollment Management

All searches will be completed during Spring 2006 with personnel to begin duties no later than July 1, 2006.

Planned Giving

Yvonne Morris Spencer

What is it?

There are those who believe that all gifts are “planned” gifts--that a donor does not simply reach into a pocket and hand over cash to a charity; but, rather, takes the time to contemplate to what charity to give, how much to give, when to give it, for what purpose it will be given, and the restrictions to be placed on the use of the gift. In other words, the donor “plans” the gift. And, in this respect, the real gift planner is the donor.

The traditional view of planned giving envisions a gift that has a deferred component. A donor makes a gift that the university cannot use right away but must wait until some date in the future to receive. Planned Giving is often seen as separate from annual and major gifts.

The reality at the SIU Foundation is a bit of both. Planned Giving, or Gift Planning or Gift Design as it is sometimes now called, is an integral part of fund raising. It is a way of helping a donor to make a gift in the most advantageous way possible. It may allow the donor to make a larger gift than he/she thought possible, may provide important tax benefits, or even a lifetime of income.

Do you have to be wealthy to make a planned gift?

Although many people

believe that only wealthy people make planned gifts, this is simply not true. Some planned gifts provide an opportunity for a donor with fairly limited assets to make a gift that will return a quarterly or annual income to him/her for a lifetime. Other planned gifts are made through a will or living trust, allowing the donor full use of the assets during his/her lifetime, but making an important gift upon their passing.

How does making a planned gift help me?

- A planned gift connects you with the university and its mission. You become a part of its future.
- You can designate the college, department or project for which you would like your gift used.
- Irrevocable planned gifts provide an income tax charitable deduction in the year of the gift (plus up to five more years if the entire deduction cannot be taken in the first year).
- Some types of planned gifts provide you with a lifetime of income.
- You have the satisfaction of knowing that you have made a difference.

How can I make a planned gift?

Everyone can make a planned gift. It's the desire and commitment which are important, not the amount of the gift. Following are several types of planned

gifts:

- *Bequest*: This is the most common type of planned gift. You simply add a provision to your will making the SIU Foundation a beneficiary. This can be done when you make your first will, change your will, or simply by asking your attorney to make a codicil to your will. Some donors leave a specific dollar amount, while others leave a percentage of their estate, or even a specific item to the Foundation. There are no income tax advantages to this method, but it does allow you to make a gift that may not have been possible during your lifetime.
- *Beneficiary Designation in a Living Trust*: This is also a very common way to make a planned gift, and very similar to a bequest designation in a will, but this is done through a living trust.
- *Life Insurance*: You may either make the SIU Foundation a beneficiary of your life insurance policy, or you may make a gift of the entire policy, thereby making the SIU Foundation the owner and beneficiary of the policy. You would continue to pay the premiums for the policy. There is an income tax charitable deduction available if a gift of the entire policy is made.



Although many people believe that only wealthy people make planned gifts, this is simply not true.

Planned Giving (cont. from P7)

- **Charitable Gift Annuity:** A lifetime income gift. In exchange for your gift of \$10,000 or more, the Foundation agrees to make income payments to you for your lifetime. Payments may start at age 55 or older. The amount of the payments depends upon your age.
- **Charitable Remainder Trusts:** A lifetime income gift. If you are 55 or older and wish to receive income for life in exchange for a gift of \$50,000 or more, a charitable remainder trust may be the answer. With some types of these trusts, your payments fluctuate with the market, making it possible for your payments to increase over time. You may also add money to this type of trust.
- **Real Estate Gift.** This may be done as either a gift through your will or trust, or may be done during your lifetime. If you make a gift of your home through a life estate agreement, you can continue to live there for your lifetime, and you receive an income tax charitable deduction.

For more information on any aspect of planned giving, please contact Yvonne Spencer, Director of Planned Giving, at 453-4907 or yvonnem@siu.edu.

Nanditha Balasubramanian Earns Pride of CASE V Award



Nan Balasubramanian

Nanditha Balasubramanian, currently Interim Director of Annual Giving, received a Pride of CASE V Award this past December. This awards program honors those institutions and individuals who demonstrate outstanding

Achievement in the execution of advancement programs.

Nan had submitted the Foundation's 2005 calendar mailing as an entry in the category, Best Program for Annual Giving. Entries

were judged based on the program's success in meeting its stated goals, use of resources, creativity and impact on the fund raising program and institution. Congratulations, Nan!

Foundation Accounting Services

Raffles in the City of Carbondale

Bryan Vagner

On September 6, 2005, the Carbondale City Council approved an ordinance amending and clarifying the City's gambling regulations. Under the City's revised gambling ordinance, raffles conducted in accordance with the Illinois Raffles Act are legally permitted.

The SIU Foundation has purchased an annual raffle license for the 2006 calendar year. As raffle

manager, Bryan Vagner will report to the City of Carbondale in advance of the event the date of the raffle and items to be raffled. This includes 50-50 raffles, any raffles where chances are sold in the city limits of Carbondale, or if the site of determining the winning chance is in the city limits of Carbondale. A licensee may rent a premise on which to determine the winning chance or chances

in a raffle only from an organization which is also licensed.

The ordinance limits the amount of the raffle to \$100,000.00, and a single raffle ticket to a maximum of \$200.00. The raffle manager is required to provide a fidelity bond in order to assure that the organization will be reimbursed in the event of loss or theft of raffle money

Raffles in the City of Carbondale (cont. from P8)

and/or prizes. compliance. We are in the that this information is
 There are penalties for non- process of reviewing our on- captured in advance of any
 line forms to be assured special event or raffle.

INSIGHTS on Staff

Welcome, Debi Hanson!

Barb Bogard

Debi Hanson joined the Accounting Services team of the SIU Foundation on December 5, 2005. Debi is our Accounting Clerk and is located near the receptionist area in Colyer Hall. Debi is providing specialized support in the areas of deposit, coding, corrections, and proofing. Debi previously had worked under Tuesday Ashner's supervision as extra help in the Alumni Association. She resides in Murphysboro with her husband, Eric, her 12-year old son, Skyler, who is the the sixth grade, and her 13-year old daughter, Kirstyn, who is in the eighth grade. Eric and Debi have been married for nearly 14 years. Debi served in the United States Air Force from July, 1986 to June, 1996. A special thanks to Debi for ten years' service to our country.



Debi Hanson
Accounting Clerk

INSIGHTS on IA Pets

We're fortunate to have two pet photos to share with staff this month. Both pets belong to Yvonne Spencer and husband, Craig, who reside in DuQuoin. Sophie is a 3-year-old tiny toy poodle. She weighs in at a whopping 5 pounds. At 10 pounds and 2-years-old, Loki is an Abyssinian—one of the oldest known cat breeds. He is very intelligent and named after the mythical Norse god of mischief. His coat is 'ticked'—each strand of hair has 2 to 3 dark bands of color—similar to deer hair. Loki is people-oriented, and Sophie knows no strangers. Sophie and Loki get along very well. They chase each other through the house daily, and sleep together at night. Both are lap pets and love treats--both come running when Yvonne shakes their treat bags.



Sophie



Loki

Information on INSIGHTS

Ways you can contribute to *IA INSIGHTS*:

- ✓ Submit articles, anecdotal stories, poetry, humor, ideas for articles, a photo and details about your pet, or an autobiography
- ✓ Create an IA comic character (i.e., Sug Bode, Gus' female counterpart) to add satire or humor to future issues
- ✓ Volunteer your digital camera and photo services

We reserve the right to edit or censor all submissions.

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