

FOURTH ANNUAL
Convio Summit
November 16-18 **2009**

CONFERENCE GUIDE



MOVE IT
LEARN, LEAD, INNOVATE

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CATHEXIS [KUH-THEK-SIS] - NOUN

1. Concentration of emotional energy on an object or idea.
2. The investment of emotional significance in an activity.



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- Database management and systems integration
- eCommunications strategy and content creation
- IT consulting and technical support
- Ongoing support for non-profit CRM and CMS software solutions
- Project management of all of the above

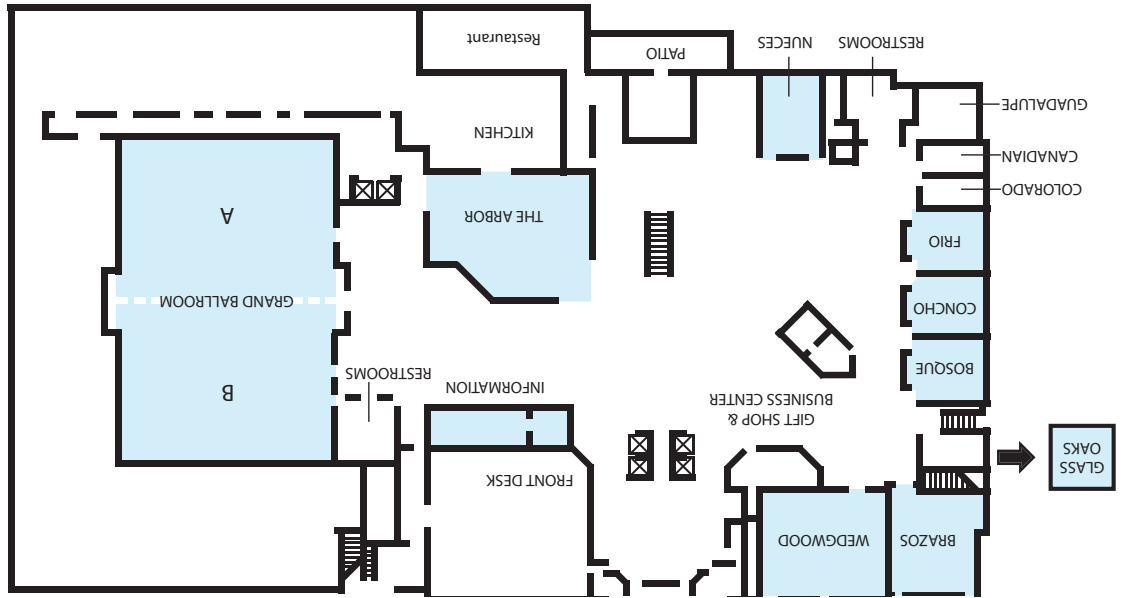


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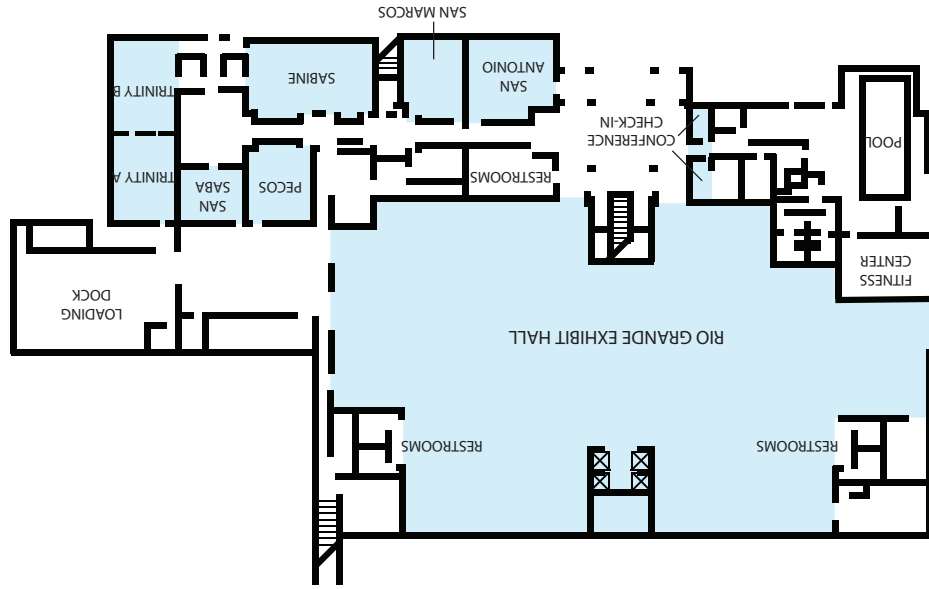
TEAR HERE

DETACH THE MINI CONFERENCE GUIDE AND
CARRY WITH YOU FOR QUICK REFERENCE.

ATRIUM LEVEL (upper level)



PLAZA LEVEL (lower level)



FOLD

FOLD

FOURTH ANNUAL
Convio Summit
 November 16-18
2009

MINI CONFERENCE GUIDE



MOVE IT

LEARN, LEAD, INNOVATE

SCHEDULE AT A GLANCE

MONDAY, NOVEMBER 16

7:30AM - 5:00PM	Conference Check-in Open
8:30AM - 3:00PM	Partner Day
12:00PM - 6:00PM	Information Desk Open
3:00PM - 6:00PM	*New this year* Interactive Workshops
6:00PM - 8:00PM	Innovator Awards and 10 Year Anniversary Party

TUESDAY, NOVEMBER 17

7:30AM - 5:00PM	Conference Check-in and Information Desk Open
9:45AM - 6:00PM	Exhibit Hall, Blog Lounge, Client Lounge, User Experience Lab Open
9:45AM - 7:00PM	Expert Lab Open

7:30AM - 8:15AM	Continental Breakfast
8:30AM - 9:45AM	General Session with Gilbert Tuhabonye
9:45AM - 10:15AM	Free time for visiting exhibitors and lounges
10:15AM - 11:30AM	Breakout Sessions
11:30AM - 12:45PM	Special Lunch session with Convio founder, Vinay Bhagat (Ballroom)
1:00PM - 2:15PM	Breakout Sessions
2:15PM - 3:00PM	Free time for visiting exhibitors and lounges
3:00PM - 4:15PM	Breakout Sessions
4:30PM - 5:45PM	Breakout Sessions
7:00PM - 12:00AM	Buses provided to and from downtown Austin from Renaissance

SCHEDULE AT A GLANCE

WEDNESDAY, NOVEMBER 18

7:30AM - 10:00AM	Conference Check-in Open
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12:30PM - 1:45PM	Breakout Sessions
2:00PM - 3:15PM	Breakout Sessions

CONFERENCE FEATURES

BUSES TO DOWNTOWN AUSTIN | Find out why Austin is called the Live Music Capital of the World! Round trip bus rides from the Renaissance hotel to downtown Austin will be provided.

TUESDAY, NOVEMBER 17 | 7:00PM - MIDNIGHT FRONT OF HOTEL

NONPROFIT TV | Comfortable in front of the camera! Stop by the Nonprofit TV studio and tell us about a great campaign you're running, or share tips and tricks that have made your organization more successful.

TUESDAY, NOVEMBER 17 | ATRIUM LOBBY (TOP OF THE STAIRS)

CLIENT LOUNGE | Need to get away from the conference for a few minutes? The Client Lounge is a "Convio-free" space just for you. Stop by, sit down and relax. Or, catch up on your email at one of our free email stations.

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | CONCHIO

CONNECTION CAFÉ | Find out what others are saying and experiencing at the Summit. Check out Convio's Connection Café blog to read live blogging from the event and to join in on the Summit discussion. www.convio.com/connectioncafe

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | PECOS

EXHIBIT HALL | Visit with companies and organizations that provide services to the nonprofit sector. Talk with them about your organization's ideas and plans, and find out how they can help you turn your dreams into reality.

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | THE ARBOR & PLAZA Foyer

EXPERT LAB | Take your questions about Convio products or about your own Convio site to the Expert Lab and get them answered. Stop by and speak face-to-face with a Convio expert. Experts will meet with you on a first-come, first-served basis. See live demos of new and exciting tools as well as updates to classic favorites. Demonstrations will include: Common Ground™, CMS, Multi-Center, Convio Open APIs, and much more!

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | SAN MARCOS

USER EXPERIENCE LAB | We want to hear from you! Stop by and say hello, take part in a usability test, or just chat about YOUR experience using Convio. As a token of our appreciation, the first 50 visitors will receive a free \$5 Starbucks card. If you sign up for a 30 minute testing session, we'll enter you in a drawing for an iPod Touch!

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | SAN SABA

BIRDS OF A FEATHER DISCUSSION TABLES | Take a break, have a bite and gather with organizations like yours to network and share ideas. This is your opportunity to connect with your peers who are doing similar work with Convio. Tables will be labeled with discussion topics.

BREAKFAST & LUNCH | WEDNESDAY, NOVEMBER 18 | RIO GRANDE

ACCOUNT MANAGEMENT CENTRAL | Convio account managers want to meet you in person. They'll be available to meet you on a first-come, first-served basis. Be sure to stop by and say hello!

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | BOSQUE



WELCOME AND HAPPY ANNIVERSARY

Welcome!

The Convio team welcomes you to the fourth annual Convio Summit. We hope your experience here will energize you for the exciting times ahead.



This year’s theme “Move it. Learn, Lead, Innovate” is appropriate for the times in which we live. The philanthropy landscape is changing rapidly due to the widespread use of technology, changing demographics of donors and, of course, the economy. Together, we have to learn new ways to connect, engage and manage constituents using the Internet, mobile technology, social media and more. Now more than ever, leaders like you are directing your organizations to strategically invest in areas that will further missions and expand audiences. Those that choose to innovate, especially in tough times, and connect with people in new and exciting ways are building a strong foundation for the better times that lie ahead of us.

I applaud your resilience and passion to overcome obstacles and congratulate you in your success. You’re passionate about your cause, and we’re passionate about helping you, and that is what the Convio Summit is all about — coming together for three days to share ideas, hear from your peers, learn the latest advances in technology and best of all, take this knowledge back to your organization for a renewed sense of focus.

We are glad that you are here! Don’t hesitate to stop me or anyone from Convio. We want to get to know you — what you’re passionate about, what keeps you up at night, and how we can help you. I look forward to seeing you over the next three days. So what are you waiting for? Move it!

Regards,

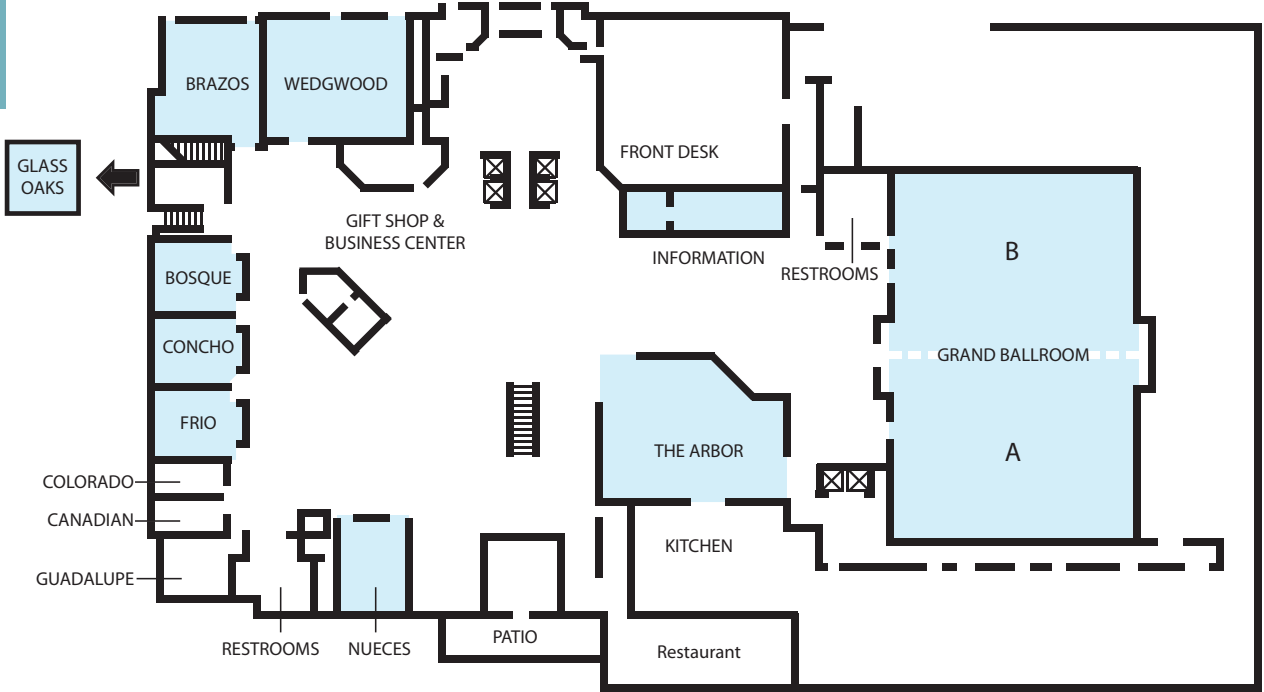
Gene Austin
Chief Executive Officer, Convio

Happy Anniversary, Convio!

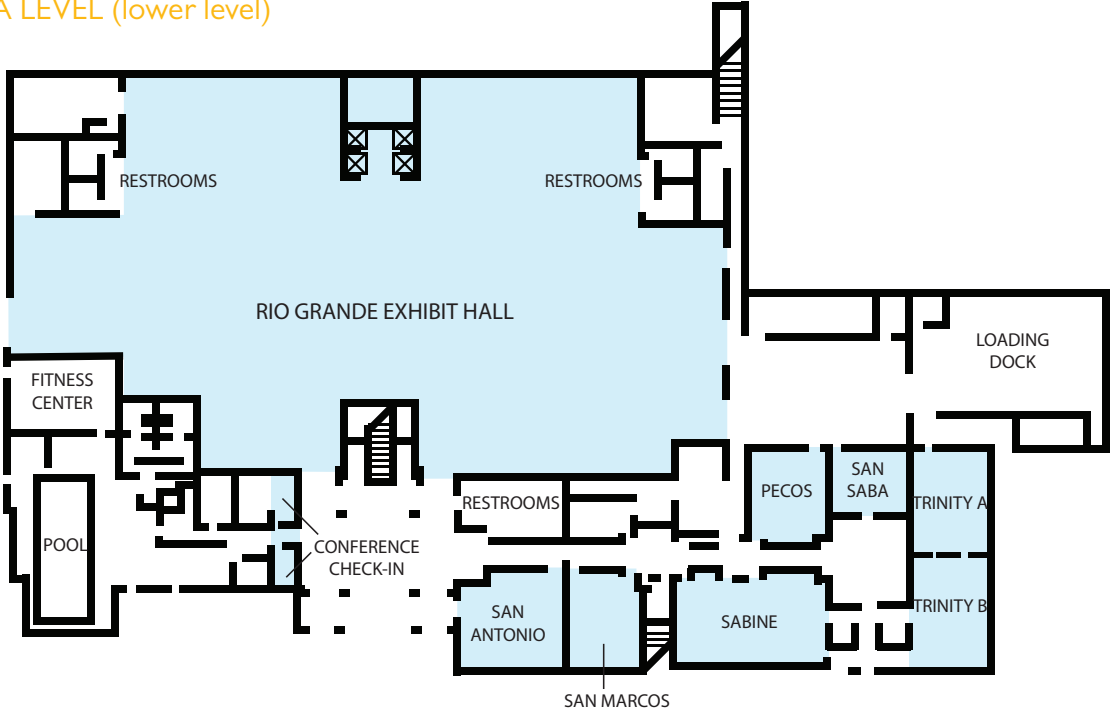
This year marks the 10th anniversary of Convio, and we are celebrating this milestone with a bang! The red carpet will be rolled out in honor of our clients and the inspiring work that you do! The evening will kickoff by recognizing this year’s Innovator Award recipients, then the celebration will continue with drinks, food and lots of networking. The party begins at 6:00pm in the Grand Ballroom.

CONFERENCE MAP

ATRIUM LEVEL (upper level)



PLAZA LEVEL (lower level)



Sorry, I gave at the office

using my laptop at lunch without the pressure of a volunteer at my front door or the worry of divulging my credit information over the phone but instead enjoyed the peace of mind of knowing that my donation was being processed with the utmost electronic security and care.

Give people another good excuse to give. Expedite, safeguard and simplify donating while reducing your charity's processing time and costs. Discover the advantage of International Automated Transaction Services – or IATS for short at www.iats.ticketmaster.com



THANK YOU TO OUR CONFERENCE SPONSORS AND EXHIBITORS

ASTADIA

www.astadia.com
Arbor table #9



www.beaconfire.com
Plaza foyer table #2



www.salestax.com
Arbor table #17



www.care2.com
Arbor table #1



www.cathexispartners.com
Arbor table #5

charityDYNAMICS

www.charitydynamics.com
Arbor table #13



www.donordigital.com



www.event360.com
Arbor table #23



www.fireflypartners.com
Arbor table #12



www.hepdevelopment.com
Arbor table #24



www.teamheller.com
Arbor table #22



www.iats.ticketmaster.com
Arbor table #2



www.idealistsconsulting.com
Arbor table #15

Jasper Design

www.jasperdesign.com
Arbor table #4

THANK YOU TO OUR CONFERENCE SPONSORS AND EXHIBITORS



www.kellpartners.com
Arbor table #6



www.landmarkclearing.com
Arbor table #11



www.mrсс.com
Arbor table #19



www.mcphersonassociates.com



www.mcommons.com
Arbor table #25



www.mysamaris.com
Arbor table #21



www.paypal.com
Arbor table #10



www.theport.com
Arbor table #16
Plaza foyer table #3



www.r3strat.com



see3 communications

www.see3.net
Arbor table #14



www.stratmark.com
Arbor table #18



www.terpsys.com
Arbor table #3



www.threespot.com
Arbor table #7



www.trinetsolutions.com
Arbor table #20



www.vmix.com
Arbor table #8

SCHEDULE AT A GLANCE

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11:30AM - 12:45PM	Special lunch session with Convio founder, Vinay Bhagat (Ballroom)
1:00PM - 2:15PM	Breakout Sessions (pages 13-14)
2:15PM - 3:00PM	Free time for visiting exhibitors and lounges
3:00PM - 4:15PM	Breakout Sessions (pages 14-17)
4:30PM - 5:45PM	Breakout Sessions (pages 17-18)
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8:30AM - 4:30PM Expert Lab Open

7:30AM - 8:30AM Continental Breakfast with optional Birds of a Feather tables (Rio)

8:30AM - 9:45AM Breakout Sessions (pages 19-20)

9:45AM - 10:15AM Free time for visiting exhibitors and lounges

10:15AM - 11:30AM Breakout Sessions (pages 20-22)

11:30AM - 12:30PM Lunch with optional Birds of a Feather tables (Rio)

12:30PM - 1:45PM Breakout Sessions (pages 22-24)

2:00PM - 3:15PM Breakout Sessions (pages 24-25)



KEYNOTE SPEAKER: GILBERT TUHABONYE

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On October 21, 1993, the centuries-old war between the Tutsi and Hutu tribes erupted in horrific reality one afternoon as Gilbert and his classmates were in school. The Hutu classmates at the Kibimba school, their parents, some teachers and other Hutu tribesmen, forced more than a hundred Tutsi children and teachers into a room where they

beat and burned them to death. After nine hours of being buried by the corpses of his beloved friends, and himself on fire, Gilbert used the charred bone of one of his classmates to break through a window. He jumped free of the burning building and ran into the night, on charred feet, the sole survivor of one of the most horrible massacres in the long Tutsi-Hutu war. He ran from that horror into a new life.

Now, 12 years later and more than 8,000 miles from Burundi, Gilbert Tuhabonye is a celebrity in the world of running. He went on to graduate college at Abilene Christian University where, despite being covered with scar tissue from his extensive burns, he was a national champion runner. He is now, by all accounts, the most popular running coach in Austin, Texas where he lives with his wife Triphine and two daughters, Emma and Grace.

Gilbert coaches runners at RunTex in Austin who call themselves Gilbert's Gazelles. He speaks English, French, Swahili and his own native Kirunde.

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YOUR CONSTITUENTS.
YOUR WEB SITE.**



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non-profits

Deep Integration with Constituent 360 and Common Ground!

GENERAL SESSION & LUNCH WITH VINAY

GENERAL SESSION AND KEYNOTE ADDRESS

Learn what's in store for Convio in 2010 and beyond from Gene Austin, Convio CEO. Then, hear Gilbert Tuhabonye's inspiring true story.

DAY	TIME	LOCATION
TUESDAY NOVEMBER 17	8:30 - 9:45AM	GRAND BALLROOM

LUNCH WITH VINAY

A commentary on the challenges and opportunities of the evolving philanthropy and technology landscapes, and how your partnership with Convio can help you achieve results today and prepare for tomorrow.

DAY	TIME	LOCATION
TUESDAY NOVEMBER 17	11:30-12:45PM	GRAND BALLROOM

LEGEND



ESSENTIALS

Ever ask yourself, "How'd they do that?" when you see a great nonprofit website, fundraising appeal or online campaign? The sessions tagged "Essentials" are right for you. You'll get a wealth of knowledge ranging from Convio product how-tos and online best practices to real-life examples for maximizing the online channel for fundraising, marketing and advocacy results.



ADVANCED

Are you pushing the envelope when it comes to your Convio product use and eager for more? If you dream about custom apps, S-tags and website conversion, then the "Advanced" sessions are for you. You will get fresh perspectives on how organizations are taking their programs to the next level.



GLOBAL

Interested in discussing the hottest trends and the latest issues affecting the nonprofit sector? Join the sessions tagged "Global" to hear about a wide range of topics presented by industry experts and leading technologists.



CFRE CREDIT

Look for the sessions with the CFRE logo which are pre-approved for continuing education points. Get a point tracking sheet from the information desk in the atrium lobby to verify your participation.

3-HOUR, HANDS-ON WORKSHOPS

DAY

I

Nov 16 Mon

PAGE
10



LOCATION
TRINITY A
PRODUCTS
CONVIO APIS

APIS FOR NERDS...ER...ADVANCED USERS

Time: 3:00 - 6:00pm

Convio Speakers: Dave Hart – Chief Technology Officer; Bruce Keilin – Manager and Principal Consultant, Technical Design Services

Join the fun at this technical workshop where you will take a deep dive into the world of Convio APIs. Work on complex, real-world examples with your fellow coders from other organizations and Convio, and get a sneak peek into the technical future of Convio APIs. Working knowledge of HTML and JavaScript is essential; prior experience using APIs from Convio, Facebook, Google, and/or Twitter is strongly recommended. Participants will learn:

- To design and implement single sign-on between Convio and a separately hosted website.
- To leverage Convio APIs from Convio CMS or from other separately hosted websites using server-side proxies and/or cross-domain javascript libraries.
- APIs best practices around performance, error handling and dealing with edge cases.



LOCATION
PECOS
PRODUCTS
EMAIL
FUNDRAISING
PERSONAL
FUNDRAISING
ADVOCACY
EVENTS
CMS

S.T.A.R. SESSION

Time: 3:00 - 6:00pm

Convio Speaker: Blake Groves – Principal Consultant

This session will give you the Strategy, Tactics, Analysis and Review of successful strategies for online fundraising and marketing. This course does not require your computer, but it does require some brain power to answer some of the 'why questions' behind the what and how of using your Convio products. We will focus on list growth, messaging strategies, relationship building and social media.



LOCATION
SABINE
PRODUCTS
NONE

SOCIAL MEDIA CHARADES

Time: 3:00 - 6:00pm

Guest Speakers: Alan Graham – President, Mobile Loaves & Fishes; David Neff – Director of Web, Film and Interactive, American Cancer Society; Carie Lewis – Director of Emerging Media, Humane Society of the United States; Matthew Mahan – Business Development & Nonprofit Relations Director, Causes; Adam Steinberg – Marketing Coordinator, The Port; Kenneth Cho – Co-Founder, Social Agency

Convio Speakers: Jordan Viator – Interactive Communications Manager; James Young – Senior Product Strategy Manager

Come work hand-in-hand with the experts from leading nonprofits who are running the most successful social media campaigns today. Walk away with a holistic understanding of how social media can positively impact your organization. You will have the opportunity to:

- Learn how to use social media to raise awareness, engagement and support of your mission.
- Develop a social media strategy with a group of your peers and receive expert advice from nonprofit social media practitioners.
- Walk away with a plan to help you form a social media strategy for your nonprofit after the conference ends.

Convio Strategic Services – Let us help you reach your goals. Stop by and visit with one of our representatives in the exhibit area.



GETTING THE MOST FROM YOUR CONVIO SOLUTION

Time: 3:00 - 6:00pm

Convio Speakers: Frank Gentry – Client Education Specialist; Mark Fisetto – Senior Solutions Engineer

This workshop is intended for people that have deployed Convio Online Marketing, Common Ground CRM, or a combination of the two. We will cover the products at a high level, with a focus on connecting strategies (e.g. housefile growth) to the tactical Convio solutions used to carry out those strategies. Specifically, we will:

- Connect your organization’s goals with the Convio solutions to achieve results.
- Help you to find at least two conversion opportunities on your website that your organization is not utilizing, and to identify the Convio solutions that can be used to realize those opportunities.
- Show you how to define an automated cultivation flow that will lead prospects down a relationship pathway to becoming fully engaged constituents.
- Understand how Common Ground presents you with a 360° view of all interactions with your constituent base, online and offline.

LOCATION
SAN MARCOS

PRODUCTS
CONVIO ONLINE
COMMON GROUND

DAY

Nov 16 Mon

PAGE



RAISE 4X/REACH 4X

Time: 3:00 - 6:00pm (also offered as breakout session in two parts on Wednesday, 10:15 - 11:30am and 12:30 - 1:45pm)

Guest Speakers: Jenny Lee – Creative Director, Oklahoma Medical Research Foundation; Danielle Johnson Vermenton – Director of Individual Giving, Boys & Girls Club of Metro Atlanta

Convio Speakers: Adam Lemmon – Senior Interactive Specialist; Jennifer Darrouzet – Solutions Marketing Manager

Did you know that if you compare a multi-part email campaign series to a single email appeal, you’ll see an average of four times the fundraising? And, that your message can reach four times the inboxes, through a structured list growth campaign? Participate in this workshop and head home with plans for a multi-part fundraising campaign and viral list growth campaign. We’ll introduce you to nonprofit marketers who have run successful campaigns on the software you’ve licensed, and teach you how to use the same best practices to achieve results fast.



LOCATION
SAN ANTONIO

PRODUCTS
FUNDRAISING
EMAIL
PAGEBUILDER
CONSTITUENT360



MOVING THE NEEDLE: HOW TO INCREASE EVENT FUNDRAISING

Time: 3:00 - 6:00pm

Guest Speakers: Brenda Miele – Director, IT Projects, Event360; Christy VanHeugten – Project Manager, Event 360

Convio Speaker: Noel Beebe – Interactive Consultant

This workshop will help you understand and measure fundraising event performance and develop a plan to achieve higher levels of engagement, registration and fundraising for your next event.

LOCATION
TRINITY B

PRODUCTS
TEAMRAISER

Don't forget to visit the Expert Lab on Tuesday and Wednesday in the San Marcos room. You're sure to learn something new, with hands-on demonstrations and access to Convio product experts!



LOCATION
WEDGWOOD
PRODUCTS
NONE

TUESDAY BREAKOUT SESSIONS

NOVEL ENGAGEMENT CAMPAIGNING

Time: 10:15 - 11:30am

Guest Speakers: Susan Neumann – Director of Engagement, Membership Department, National Trust for Historic Preservation; Abby Sandlin – Senior Consultant, Charity Dynamics

Convio Speaker: Matthew Mielcarek – Principal Consultant

A trove of engagement data exists about each and every one of your online constituents. How are you putting this data to work? This session will help you to identify and target engaged non-donors and will cover strategies for activating disengaged online and lapsed donors.



LOCATION
SABINE
PRODUCTS
NONE

NO REALLY, *SHOW ME THE MONEY!* MERCHANDISED GIVING

Time: 10:15 - 11:30am

Guest Speaker: Alisa Aydin – Director of Interactive Marketing, US Fund for UNICEF

Convio Speaker: Molly Brooksbank – Senior Interactive Consultant

If your mission was an object, what would it be? Virtual stores and tangible asks help donors connect with your mission through the power of symbols. If you've ever seen a campaign to donate backpacks for kids, livestock for families or trees for a forest and wondered, "How could my nonprofit do this?" then this session is for you. Learn how to use symbolic offers to attract and build rapport with donors. Explore the opportunities and challenges associated with opening a virtual store: Should the gift be designated? What makes a good honor gift? How can I get started?



LOCATION
NUECES
PRODUCTS
ADVOCACY
SURVEYS

THE ANATOMY OF A SUCCESSFUL ONLINE ADVOCACY CAMPAIGN

Time: 10:15 - 11:30am

Guest Speakers: Joel Bartlett – Assistant Director of Marketing, People for the Ethical Treatment of Animals; Barry Jackson – Online Advocacy Manager, AARP; Kevin Reid – Vice President, Amplify

Convio Speaker: Noah Cooper – Senior Consultant, Technical Design Services

Defining advocacy success means more than just high participation numbers and viral activity; it means actually changing the policies of the legislative body, corporation or other decision-makers that you are targeting. You should incorporate several best practices into your online advocacy efforts to ensure that your constituents' voices are heard and that your message is as effective as possible. Hear from some dynamic speakers about how their efforts resulted in real-world policy change.



LOCATION
SAN ANTONIO
PRODUCTS
NONE

ISSUES AND INSIGHT ON PRIVACY LAWS AND THE IMPACT ON PHILANTHROPY

Time: 10:15 - 11:30am

Guest Speakers: Paul Clolery – Editor-in-Chief, *The Nonprofit Times*; Geoff Peters – President & CEO, CDR Fundraising Group; Deborah Edward – Ph.D., The University of Texas at Austin, RGK Center for Philanthropy and Community Service

Convio Speaker: Tad Druart – Director, Corporate Communications

The threat of new regulations involving Internet privacy is prompting web advertisers to give consumers more control over how their private information is collected and used online. What impact will this have on philanthropy and donor data?



LOCATION
GLASS OAKS
PRODUCTS
COMMON GROUND

THERE'S AN APP FOR THAT! MAKING YOUR DONOR DATABASE "DO MORE" THAN BEFORE

Time: 10:15 - 11:30 am

Guest Speakers: Judi Sohn – Vice President of Operations, C3: Colorectal Cancer Coalition; Jerry Huskins – EVP Corporate Development, Astadia

Convio Speaker: Tompkins Spann – Senior Market Strategist

Because Common Ground was built on the Force.com platform, clients can take advantage of nearly 1,000 add-on applications available through the AppExchange. There you'll find everything from nonprofit-specific apps, to apps that link Facebook and Twitter with Common Ground, and loads of apps for managing your back-office operations like expense tracking, project management, and much more. Attend this session to hear how nonprofits are using apps from the AppExchange to manage their mission work and integrate multiple pieces of their organization together.

DAY
2

Nov 17 Tues

PAGE
13

▼ 1:00 - 2:15pm



LOCATION
GLASS OAKS
PRODUCTS
CONVIO ONLINE

USING YOUR USERS: ENHANCING YOUR WEBSITE THROUGH AUDIENCE ANALYSIS

Time: 1:00 - 2:15pm

Guest Speaker: Bethany Bauman – Associate Director, eCRM, American Diabetes Association

Convio Speaker: Lacey Kruger – Senior Information Architect

See how organizations are tuning into their audiences' personalities and needs to increase conversion of site visitors into subscribers. Participants will learn:

- The importance of learning about your site visitors to balance their needs with your internal priorities — being able to define and prioritize audience groups.
- Techniques for educating your organization about site visitors and building consensus.
- How a sophisticated organization (American Diabetes Association) used constituent personas to develop audience-specific pathways and communications on their new website.



LOCATION
SAN ANTONIO
PRODUCTS
TEAMRAISER

MAXIMIZING EVENT FUNDRAISING

Time: 1:00 - 2:15pm (repeat session Tuesday, 4:30 - 5:45pm)

Guest Speakers: Mondy Lamb – Marketing Director, SPCA of Wake County; Kerri Mink – Systems and Web Manager, American Brain Tumor Association; Jason Wood – Director of Internet Services, Salvation Army; Mark Becker – President and Founder, Cathexis Partners

Convio Speaker: Joey Martin – Lead Project Manager, Program Management Services

This session will cover the best practices you should consider when planning your TeamRaiser event. Learn how to keep participants engaged from one year to the next and encourage them to attain higher levels of fundraising. Learning objectives:

- How to engage last year's participants.
- Inspire participants to raise money and reach more people.
- Increase donations without increasing participants.
- Effective follow-up after your event.
- What to do during the off season.



LOCATION
WEDGWOOD

PRODUCTS
CMS

GO MOBILE! PUT YOUR WEBSITE INTO YOUR CONSTITUENTS' HANDS USING CONVIO CMS

Time: 1:00 - 2:15pm

Convio Speakers: Kevin Suer – Senior Product Manager; Bruce Keilin – Manager and Principal Consultant, Technical Design Services

Do your constituents use iPhones and Blackberry's? Learn about the mobile strategies, best practices, and implementation techniques necessary to create an engaging, mobile-friendly experience. In this session, we will examine state-of-the-art mobile websites and highlight good and bad examples. We will empower you with the knowledge and tools necessary to make your site an effective communication channel in an increasingly mobile world.



LOCATION
TRINITY

PRODUCTS
CONVIO ONLINE
COMMON GROUND

CONVIO 2010 PRODUCT ROADMAP

Time: 1:00 - 2:15pm (repeat session Tuesday, 4:30 - 5:45pm)

Convio Speakers: John Stockton – Director, Product Management; Tom Krackeler – Vice President, Common Ground; Gary Allison – Vice President, Engineering

Share your feedback on the themes and major headline developments planned for Convio Online Marketing and Common Ground.



LOCATION
SABINE

PRODUCTS
COMMON GROUND

THINK THERE'S NOTHING NEW IN DONOR DATABASES? CHECK OUT COMMON GROUND

Time: 1:00 - 2:15pm (repeat session Tuesday, 4:30 - 5:45pm)

Guest Speaker: Keith Heller – Principal, Heller Consulting

Convio Speaker: Kate Harwood – Implementation Manager

See how Common Ground has replaced donor database products like the Raiser's Edge, eTapestry, PledgeMaker, DonorPerfect and more and how it is meeting both the current and future fundraising needs of nonprofits. Common Ground is like nothing else out there — more and more organizations are seeing results and enjoying the tight integration with the Convio Online Marketing suite.

▼ 3:00 - 4:15pm



LOCATION
WEDGWOOD

PRODUCTS
DATASYNC

IMPORT/EXPORT: HOW TO EFFECTIVELY MOVE AND MANAGE YOUR DATA

Time: 3:00 - 4:15pm (repeat session Wednesday, 2:00 - 3:15pm)

Convio Speakers: Cynthia Balusek – Manager, Client Support; John Miller – Client Support Analyst

In this session, learn how to use Convio tools, create processes, and follow best practices for moving data in and out of the Convio system. This will include:

- Standard and custom constituent imports.
- Interest and group assignment.
- Standard constituent download.
- Transaction information download.



ADVANCED “ENGAGEMENT PATHWAYS”: MOVING BEYOND THE WELCOME SERIES

Time: 3:00 - 4:15pm

Guest Speakers: Kacey McGowen – Associate Director, Internet, Interactive and Affinity Strategy and Development, Paralyzed Veterans of America; Marc Ruben – Vice President, eCampaigns, M+R Strategic Services

Convio Speaker: Brad Duff-Hudkins – Interactive Consultant

Move constituents down cultivation or “engagement pathways” online. Topics include:

- Defining your audience segments and designing appropriate treatments for each.
- Identifying potential monthly and major donors.
- Optimizing your website to complement segmented emails.
- Implementing advocate-to-donor conversion programs.

LOCATION
BALLROOM A
PRODUCTS
ADVOCACY

DAY
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Nov 17 Tues

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CHANNEL INTEGRATION 101: ONLINE AND OFFLINE WORK BETTER TOGETHER

Time: 3:00 - 4:15pm

Guest Speakers: Abby Koenig – Assistant Director of Membership, Houston PBS; Tim O’Leary – Vice President, McPherson Associates

Convio Speaker: Kelsi Morrow – Senior Account Manager

Acquire and reactivate donors through channel integration while lowering costs. This session will cover:

- Converting web visitors to registrants.
- Building internal prospect lists.
- Maintaining and expanding the donor relationship.

LOCATION
TRINITY
PRODUCTS
NONE



ESSENTIAL WEBSITE ANALYTICS

Time: 3:00 - 4:15pm

Guest Speaker: Robin Steffek – VP of Interactive Technology, Red Engine Digital

Convio Speaker: Andrew Magnuson – Interactive Consultant

Web analytics tools churn out an overwhelming amount of data, but where should you start and what should you be paying attention to? In this session, we’ll introduce you to key metrics and show you real-world examples of how to apply them, ask the right questions, and make meaningful decisions that impact specific strategic goals. You will learn:

- Strategies for defining website and/or campaign goals to get the most out of your analytics.
- Ten web analytics metrics you should care about and why.
- How metrics can serve larger, results-focused strategic goals.

LOCATION
NUECES
PRODUCTS
NONE

Look for the CSP Label

Convio Solution Providers (CSPs) consult around and deploy Convio software. They also provide related post-deployment services that may include interactive strategy and web design. CSPs achieve authorized status through training and testing, so you can count on them for the quality you expect.

The following firms are CSPs as of October 2009:

ACF Solutions***	Boston Interactive**	Charity Dynamics***	Idealist Consulting*	Mysamaris**	NPower NY*
Amplify Public Affairs**	Cathexis Partners**	Event 360**	is7**	NFP Technologies*	R3 Strategies**
Astadia*	Causeway	Firefly Partners***	Jasper Design**	Northridge	Terpsys**
Beaconfire**	Interactive**	Heller Consulting*	KELL Partners***	Interactive**	

* = authorized on Convio Common Ground

** = authorized on Convio Online Marketing products

*** = authorized on Convio Common Ground and Convio Online Marketing products





LOCATION
GLASS OAKS

PRODUCTS
NONE

HELP! I NEED SOMEBODY — STRUCTURE AND STAFFING FOR MULTICHANNEL SUCCESS

Time: 3:00 - 4:15pm

Guest Speakers: Julie Butcher – EVP, Information Technology, National Multiple Sclerosis Society; Mondy Lamb – Marketing Director, SPCA of Wake County

Convio Speaker: Brian Hauf – Vice President, Strategic Services

Your organization's decision structure, internal staffing, and outsourcing plans, and management structure can directly impact your ability to succeed online. See how your nonprofit peers have been able to tackle this critical challenge. Participants will learn:

- How to organize your precious resources.
- New ways to plan the priorities for these resources.
- How to assign ownership and accountability for your staff.
- How to acquire/develop the interactive skills required.



LOCATION
BALLROOM B

PRODUCTS
EMAIL

THE HEALTHY HOUSEFILE: BUILDING AND CULTIVATING YOUR LIST

Time: 3:00 - 4:15pm (repeat session Wednesday, 2:00 - 3:15pm)

Guest Speaker: Christine Weinheimer – Director of Communications, Yellowstone Park Foundation

Convio Speaker: Patrick Hansen – Principal Consultant

Is your housefile in good health? Know the basics of effective email housefile building and nurturing. This includes stewardship, viral offers, simple and effective welcome messages, segmentation, and constituent profiling. Participants will learn:

- Baseline metrics for measuring housefile health.
- Tactics and related campaign concepts for building and nurturing your housefile.
- Tactics and related activities for planning and constituent profiling.



LOCATION
SAN ANTONIO

PRODUCTS
EMAIL
FUNDRAISING
WEB SERVICES

BUILDING CUSTOM APPLICATIONS WITH CONVIO WEB SERVICES

Time: 3:00 - 4:15pm

Convio Speakers: Karl Goldstein – Principal Engineer; Kevin Suer – Senior Product Manager

An introduction to leveraging Convio Web Services for building custom data integration, reporting and visualization applications. Participants will learn about:

- The goal of Convio Web Services: full access to your online data.
- The differences between ReST and SOAP.
- Convio WSDL, the data types it makes accessible and the two main categories of operations.
- The basics of the Web Services Console.
- The typical development lifecycle for applications that leverage Convio Web Services.

Participants will also see a sample application in action: a data reporting application for the Adobe AIR platform.

Meet the Convio account management team. Stop by to say hello in the Bosque room.



LOCATION
SABINE
PRODUCTS
EMAIL
FUNDRAISING

GOING BEYOND THE DONATE BUTTON

Time: 3:00 - 4:15pm (repeat session Wednesday, 2:00 - 3:15pm)

Guest Speakers: Todd Turner – Director of Web Ministries, Insight for Living; Michael Cervino – Vice President, Beaconfire Consulting; Nick Allen – Chief Strategy Officer, DonorDigital

Convio Speakers: Vinay Bhagat – Founder and Chief Strategy Officer; Kate Millea – Interactive Consultant

Extend the effectiveness of your online fundraising appeals by looking at factors beyond the appeals themselves. Dive into topics including:

- Optimizing landing pages, donation forms and recurring giving programs.
- Customized ask strings.
- Videos and multimedia that motivate giving.

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▼ 4:30 - 5:45pm



LOCATION
BALLROOM B
PRODUCTS
CONVIO APIS

GET YOUR GEEK ON WITH CONVIO APIS

Time: 4:30 - 5:45pm

Convio Speakers: Dave Hart – Chief Technology Officer; Bruce Keilin – Manager and Principal Consultant, Technical Design Services

Learn what is (and isn't) possible using Convio APIs to advance your organization's mission. In this technical session, we will dive into the detailed mechanics of using the APIs, including looking at real-world code examples. Wear your pocket protector and be ready to geek out. Participants will learn:

- What Convio features can be used via APIs and which ones can't.
- What can be done to enable a single sign-on between Convio and a separately hosted website.
- How Convio APIs can be leveraged from Convio's CMS or from other separately hosted websites using server-side proxies and/or cross-domain JavaScript libraries.
- Best practices around performance, error handling and dealing with edge cases when using APIs.



LOCATION
WEDGWOOD
PRODUCTS
CMS

JOIN THE SOCIAL MEDIA MOVEMENT: MANAGE YOUR FUNDRAISING, MARKETING AND BRANDING

Time: 4:30 - 5:45pm

Guest Speakers: Carie Lewis – Director of Emerging Media, Humane Society of the United States; Jeff Patrick – President and Founder, Common Knowledge

Convio Speaker: Jordan Viator – Interactive Communications Manager

Nonprofits have a great deal to gain from using social media effectively. This session covers the basics of incorporating it into your fundraising and marketing mix, as well as how to monitor your nonprofit brand online to deal with both "fans" and "detractors." Attendees will learn:

- How many nonprofits are currently using social media tools effectively.
- The scoop on the most popular sites and considerations before setting up your accounts.
- How to make a social media plan and what tools make the most sense for your organization.
- How to track and analyze results.



LOCATION
TRINITY
PRODUCTS
CONVIO ONLINE
COMMON GROUND

CONVIO 2010 PRODUCT ROADMAP

Time: 4:30 - 5:45pm (repeat session Tuesday, 1:00 - 2:15pm)

Convio Speakers: John Stockton – Director, Product Management; Tom Krackeler – Vice President, Common Ground; Gary Allison – Vice President, Engineering

Share your feedback on the themes and major headline developments planned for Convio Online Marketing and Common Ground.



LOCATION
SAN ANTONIO
PRODUCTS
TEAMRAISER

MAXIMIZING EVENT FUNDRAISING

Time: 4:30 - 5:45pm (repeat session Tuesday, 1:00 - 2:15pm)

Guest Speakers: Mondy Lamb – Marketing Director, SPCA of Wake County; Kerri Mink – Systems and Web Manager, American Brain Tumor Association; Jason Wood – Director of Internet Services, Salvation Army; Mark Becker – President and Founder, Cathexis Partners

Convio Speaker: Joey Martin – Lead Project Manager, Program Management Services

This session will cover the best practices you should consider when planning your TeamRaiser event. Learn how to keep participants engaged from one year to the next and encourage them to attain higher levels of fundraising. Learning objectives:

- How to engage last year’s participants.
- Inspire participants to raise money and reach more people.
- Increase donations without increasing participants.
- Effective follow-up after your event.
- What to do during the off season.



LOCATION
GLASS OAKS
PRODUCTS
NONE

MEASURING AND OPTIMIZING MULTI-CHANNEL MARKETING EFFORTS

Time: 4:30 - 5:45pm

Guest Speakers: Jeff Regen – VP of Online Marketing, Defenders of Wildlife; Kevin Moran – Co-Founder & Principal, Integral

Convio Speaker: Vinay Bhagat – Founder and Chief Strategy Officer

A lot of organizations are engaged in multi-channel marketing, but few are measuring their efforts “scientifically” nor necessarily optimizing the coordination of channels and the treatment of different audiences. Join this lively discussion among practitioners about how they measure integrated marketing programs, and what best practices they’ve arrived upon. Come ready to share.



LOCATION
BALLROOM A
PRODUCTS
CMS

EFFECTIVE HOMEPAGE DESIGN SLAM

Time: 4:30 - 5:45pm (repeat session Wednesday, 8:30 - 9:45am)

Convio Speakers: Lacey Kruger – Senior Information Architect; Don Roach – Lead Visual Designer

You have just a few seconds to capture your users’ attention before they click away to another surfing-squirrel video on YouTube. In this hands-on interactive session, you’ll evaluate the effectiveness of a sample website and walk away with a bucket full of ideas and tools that will transform your homepage into a user-focused, goal-driven, results-gettin’ machine.



LOCATION
SABINE
PRODUCTS
COMMON GROUND

THINK THERE’S NOTHING NEW IN DONOR DATABASES? CHECK OUT COMMON GROUND

Time: 4:30 - 5:45pm (repeat session Tuesday, 1:00 - 2:15pm)

Guest Speaker: Keith Heller – Principal, Heller Consulting

Convio Speaker: Kate Harwood – Implementation Manager

See how Common Ground has replaced donor database products like the Raiser’s Edge, eTapestry, PledgeMaker, DonorPerfect and more and is meeting both the current and future fundraising needs of nonprofits. Common Ground is like nothing else out there — more and more organizations are seeing results and enjoying the tight integration with the Convio Online Marketing suite.

Have you visited the User Experience Lab yet? Be sure to stop by and take part in a usability test, or just chat about your experience using Convio. As a token of our appreciation, the first 50 visitors will receive a \$5 Starbucks card.

WEDNESDAY BREAKOUT SESSIONS



LOCATION
BALLROOM B
PRODUCTS
CMS

EFFECTIVE HOMEPAGE DESIGN SLAM

Time: 8:30 - 9:45am (repeat session Tuesday, 4:30 - 5:45pm)

Convio Speakers: Lacey Kruger – Senior Information Architect; Don Roach – Lead Visual Designer

You have just a few seconds to capture your users' attention before they click away to another surfing-squirrel video on YouTube. In this hands-on interactive session, you'll evaluate the effectiveness of a sample website and walk away with a bucket full of ideas and tools that will transform your homepage into a user-focused, goal-driven, results-gettin' machine.



LOCATION
WEDGWOOD
PRODUCTS
CMS

CREATIVE STRATEGIES IN ANIMAL WELFARE

Time: 8:30 - 9:45am

Guest Speaker: Michael Robbins – Director of Marketing & Communications, Michigan Humane Society

Convio Speakers: Kent Gilliam – Interactive Consultant; Laura Brown – Senior Account Manager

We will present information and examples of traditional and non-traditional uses of online tools and functions that have generated great results for other animal welfare organizations. Come learn how to add value to your website, drive site traffic, increase donations and site registrations, and create expanded fundraising opportunities. The goal is for you to learn a new campaign idea that you can take home to your shelter and immediately implement and create results.



LOCATION
SAN ANTONIO
PRODUCTS
CONSTITUENT360
COMMON GROUND

ONLINE AND OFFLINE MEET ON COMMON GROUND

Time: 8:30 - 9:45am

Guest Speaker: Lindsy Gish – E-Communications Marketing Manager, Second Harvest Heartland

Convio Speaker: Rachel English – Program Manager

See how Convio is making imports and exports a thing of the past by tightly integrating Constituent360 with Common Ground. Nonprofits that use both tools together are saving time and gaining a competitive advantage by combining their online and offline campaigns to achieve better results.



LOCATION
SABINE
PRODUCTS
CONVIO APIS

PEREZ HILTON MAY NOT COVER THEM, BUT CONVIO APIS ARE HOT!

Time: 8:30 - 9:45am

Guest Speakers: Chris Baggett – Senior Webmaster, Insight for Living; Donna Wilkins – President, Charity Dynamics

Convio Speakers: James Young – Senior Product Strategy Manager; Corey Pudhorodsky – Lead Consultant, Technical Design Services

It seems crazy that Perez, The Defamer and other A-List bloggers haven't been mentioning all of the cool things being done with Convio APIs. Well, we want to rectify that by showing you just how hot the Convio APIs really are. This non-technical session will expose some of the craziest experiences built using our APIs and give you insight into the creative process behind the work. You'll see real examples and have a chance to ask questions of the people who built them. Attendees will learn:

- How Convio APIs are best used.
- What is possible with the APIs.
- What kind of effort and expertise are needed to succeed.

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Think There's Nothing New In Donor Management? Think Again.

Software your team will actually enjoy. Fits the way you work. Hassle free for IT. Visit with a Common Ground representative at the Convio exhibit booth.



LOCATION
GLASS OAKS
PRODUCTS
TEAMRAISER

TEAMRAISER: NEXT STEPS

Time: 8:30 - 9:45am (repeat session Wednesday, 12:30 - 1:45pm)

Guest Speakers: Dario Mallerman – Manager, Online Marketing and Giving, YAI Network; Nicole Aubry – Manager, Central Park Challenge, YAI Network; Bethany Bauman – Associate Director, eCRM, American Diabetes Association; Jonathan Drennan – Senior Consultant, Charity Dynamics

Convio Speaker: April Davis – Consultant, Web Development Services

Now that you know the basics, learn about some of the more advanced features available in TeamRaiser that can help you build a compelling website and get more participants fundraising!



LOCATION
TRINITY
PRODUCTS
NONE

USING GOOGLE ANALYTICS TO DRIVE RESULTS

Time: 8:30 - 9:45am

Guest Speaker: Brett Meyer – Communications and Web Manager, NTEN

Convio Speaker: Dimitri Lundquist – Information Architect

If you've been using Google Analytics for a while, you're likely comfortable with basic reporting and what those reports mean. Now, take your analytics to the next level by applying the information to drive meaningful results. Join NTEN's Brett Meyer for a live demonstration on how to use Google Analytics to understand website performance in terms of measuring progress toward your organizational goals. You'll leave with tips and tricks you can use right away and see first-hand how NTEN applied these principles to successfully increase site traffic and inform their site redesign. Participants will learn how to:

- Apply analytics data in context to answer specific questions and meet specific goals.
- Use web analytics to understand the performance of your websites, how to measure progress toward organizational goals, and turn your accumulated data into actual site improvements.

▼ 10:15 - 11:30am



LOCATION
BALLROOM A
PRODUCTS
EMAIL
SURVEYS
CONSTITUENT360

THE FIRST 30 DAYS

Time: 10:15 - 11:30am

Guest Speaker: Jaime-Alexis Fowler – Online and New Media Editor, Pathfinder International

Convio Speaker: Kenan Pollack – Senior Interactive Consultant

Congratulations! You've captured a prospect's email. Uh, what now? After you've spent the time, energy and money bringing in new names, how do you ensure your prospects have a positive experience, stay engaged, and tell their peers? This session will cover essentials around those critical 30 days after a prospect joins your list and the relationship begins. Learning objectives include:

- Getting even the small details right. (Hint: When's the last time YOU walked in your prospect's shoes online?)
- Building and launching a multi-part welcome series using relationship pathways.
- Promoting viral and peer-to-peer tools.
- Cultivating the relationship and delivering the first ask.



LOCATION
SABINE
PRODUCTS
EMAIL

HOT TOPICS IN EMAIL DELIVERABILITY: STRENGTHEN YOUR EMAIL REPUTATION

Time: 10:15 - 11:30am

Convio Speakers: Bill Pease, Chief Scientist; T.J. Spinks, Operations Analyst

This session will provide an overview of Convio's email delivery assurance program. Learn how to investigate and reduce spam complaints and improve your email reputation. We'll cover the important parameters that influence your email deliverability – list acquisition methods, audience segmentation, and messaging frequency. And, ensure your email program reflects the best practices.



LOCATION
TRINITY
PRODUCTS
EMAIL

MEET THE NEW AND IMPROVED WYSIWYG

Time: 10:15 - 11:30am

Convio Speakers: Myra Friel – Senior Product Manager; Noah Cooper – Senior Consultant, Technical Design Services; Jeff Kingsland – Senior Client Support Analyst; Matt Rupe – Senior Engineer

All levels are invited to take a tour of the new and improved Convio HTML WYSIWYG Editor in this session. This is a great chance to become familiar with the new WYSIWYG and learn more about the benefits of this upgrade. You will find your day-to-day Convio tasks like creating email content and building PageBuilder pages easier with the new WYSIWYG. Please note that this is the WYSIWYG for the Convio Online Marketing tool and does not apply to Convio CMS.



LOCATION
SAN ANTONIO
PRODUCTS
CMS
CONVIO APIs
EMAIL

CROWD SOURCING YOUR WAY TO THE TOP OF THE VIDEO HEAP

Time: 10:15 - 11:30am

Guest Speakers: David Neff – Director of Web, Film and Interactive, American Cancer Society; Ramya Raghavan – Nonprofits & Activism Manager, YouTube; Michael Hoffman – CEO, See3 Communications

Convio Speaker: Jordan Viator – Interactive Communications Manager

This session will cover how using videos to tell stories and drive support can be an effective strategy for nonprofit organizations. In this session, we'll discuss using constituent-generated videos to reach your audience on YouTube and your website, walk through the great examples of using video on Convio-powered pages and share practical tips on integrating video strategically and technically.



LOCATION
BALLROOM B
PRODUCTS
NONE

MAKING MOBILE MATTER: MESSAGE, MOTIVATE AND MONETIZE!

Time: 10:15 - 11:30am

Guest Speakers: Brian Rubenstein – Associate Director, American Cancer Society Cancer Action Network; Matt Wilson – Director of Partnerships, Mobile Commons

Convio Speaker: Kevin Shin – Senior Account Manager

Mobile technology continues to develop and continues to be an accessible tool for those who want to build lists, inform constituents, inspire action, and raise funds. We'll discuss several successful campaigns for advocacy, fundraising, and member communications and share what works and how to make it work for you.



LOCATION
WEDGWOOD
PRODUCTS
FUNDRAISING

FUNDRAISING AND THE EMERGING SCIENCE OF BEHAVIORAL ECONOMICS

Time: 10:15 - 11:30am

Guest Speakers: Sue Citro – Senior Manager, Digital Membership, Nature Conservancy; Alia McKee – Principal for International Rescue Committee; Mark Rovner – Founder and Principal, Sea Change Strategies

Convio Speaker: Matthew Mielcarek – Principal Consultant

The past few years have seen a revolution in our understanding of how people make decisions, including decisions about charitable giving. Books like “Predictable Irrationality” and “Nudge” reflect a radical new insight into human behavior, one that turns many of our cherished assumptions on their heads. This session will review recent research and focus on takeaway lessons for fundraising and public engagement. Issues we will cover include:

- Emotional vs. intellectual messages, and the power of imagery.
- Getting people to take the first step.
- Conventional practices we would do well to avoid.

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Nov 18 Wed

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LOCATION
GLASS OAKS
PRODUCTS
TEAMRAISER

TEAMRAISER PARTICIPANT CENTER 2.0: PUTTING THE "FUN" IN FUNDRAISING

Time: 10:15 - 11:30am (repeat session Wednesday, 2:00 - 3:15pm)

Guest Speakers: Heather Lawrence – Manager, Affiliate Race for the Cure, Susan G. Komen; Derek Martin – Associate Director of Donor Services, San Francisco AIDS Foundation

Convio Speaker: Chris Simoes – Software Development Manager, Engineering

Curious about the new Participant Center 2.0? Looking to make it easier for your constituents to raise money for you? Learn how the new Participant Center 2.0 was completely redesigned from the ground up to remove distractions and allow the user to focus on what matters: reaching their fundraising goals. We will detail all of the usability improvements and show off new features that make Participant Center 2.0 the best grassroots fundraising tool on the Internet. Plus, two clients who have already moved their events to Participant Center 2.0 will explain why and answer your questions.



LOCATION
NUECES
PRODUCTS
FUNDRAISING
EMAIL
PAGEBUILDER
CONSTITUENT360

RAISE 4X

Time: 10:15 - 11:30am (presented as hands-on workshop on Monday, 3:00 - 6:00pm)

Guest Speaker: Danielle Johnson Vermenton – Director of Individual Giving, Boys & Girls Club of Metro Atlanta

Convio Speakers: Rachael Ahrens – Senior Interactive Specialist; Jennifer Darrouzet – Solutions Marketing Manager

Did you know that if you compare a multi-part email campaign series to a single email appeal, you'll see an average of four times the fundraising? Hear the story of such a campaign from concept to results, then roll up your sleeves to plan out your next fundraising campaign under the guidance of experts. Head home with paper mock-ups of the email messages, donation forms and webpages you'll need to launch your campaign, plus our planning worksheets, recommended campaign calendars, best-practice email templates and all the campaign samples covered.



▼ 12:30 - 1:45pm



LOCATION
NUECES
PRODUCTS
FUNDRAISING
EMAIL
PAGEBUILDER
CONSTITUENT360

REACH 4X

Time: 12:30 - 1:45pm (presented as hands-on workshop on Monday, 3:00 - 6:00pm)

Guest Speaker: Jenny Lee – Creative Director, Oklahoma Medical Research Foundation

Convio Speakers: Rachael Ahrens – Senior Interactive Specialist; Jennifer Darrouzet – Solutions Marketing Manager

Because nonprofits earn an average of \$13.96 in online revenue per email address, per year, you should be planning structured campaigns whose sole objective is list growth. Hear the story of such a campaign from concept to results, then roll up your sleeves to plan out your next list growth campaign under the guidance of experts. Head home with paper mock-ups of email messages, webpages, planning worksheets, recommended campaign calendars, best-practice email templates and all the campaign samples covered.



LOCATION
SAN ANTONIO
PRODUCTS
NONE

LISTEN UP! USE YOUR WEBSITE TO STEER YOUR CONTENT AND BUILD BETTER RELATIONSHIPS

Time: 12:30 - 1:45pm

Guest Speakers: Susan Neumann – Director of Engagement, Membership Department, National Trust for Historic Preservation; Abby Sandlin – Senior Consultant, Charity Dynamics

Convio Speaker: Brandy Reppy – Information Architect

Your website is one of many ways that your organization talks to its members. Like any good conversationalist, the website should not only speak to your visitors, but also listen to what they are saying. In this session, we'll discuss strategies on how to collect visitor information, and how to use that information when you're developing your site's content to engage your audience.



LOCATION
BALLROOM A
PRODUCTS
NONE

SHOULD YOU 'PAY TO PLAY'? INNOVATIVE WAYS TO BUILD YOUR SUPPORTER BASE

Time: 12:30 - 1:45pm

Guest Speakers: Michael Johnston – President, HJC; Liz Murphy – President, RedEngine Digital; Michael Ward – Senior Vice President, M+R Strategic Services

Convio Speaker: Molly Brooksbank – Lead Consultant

Psst! Hey buddy, want to buy a lead? At first blush, paying for emails may seem suspect at best, particularly when free, or organic. Options abound online and the word “spam” is never far away. But, with rising direct mail acquisition costs, it’s more and more important to find online alternatives to build your file. True, organic name/donor acquisition is always the most economic, but how do you grow volumes? When do paid, cost-per-lead services make sense? This session will cover various list-building techniques and related financials, including:

- Email offers and benefits to grow organic conversion.
- Using direct mail for integrated marketing conversion.
- Effective integration of appended names.
- Social networking and peer-to-peer based outreach and list growth.
- Paid services like e-Miles, Pontiflex, and Care2.

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3

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LOCATION
SABINE
PRODUCTS
EMAIL

OUR FLEXIBLE FRIENDS: USING CONVIO S TAGS AND CONDITIONAL CONTENT TO BOOST FUNDRAISING

Time: 12:30 - 1:45pm

Guest Speakers: Elizabeth Nielsen – Online Fundraising Manager, Feeding America; Brenda Miele – Director of IT Projects, Event360

Convio Speakers: Ken Cantu – Lead Implementation Specialist, Program Management Services; Taylor Shanklin – Implementation Specialist

Your websites look great, but do your fundraising strategies and techniques take full advantage of what is possible with some of the most versatile Convio tools and a little creativity? We’ll show you how to improve upon the standard marketing techniques in unique and creative ways using standard Convio functionality such as S tags and conditional content.



SAVE THE DATE!

Convio Summit 2010 will be in Baltimore.

October 25-27

www.convio.com/summit2010baltimore



LOCATION
GLASS OAKS
PRODUCTS
TEAMRAISER

TEAMRAISER: NEXT STEPS

Time: 12:30 - 1:45pm (repeat session Wednesday, 8:30 - 9:45am)

Guest Speakers: Dario Mallerma – Manager, Online Marketing and Giving, YAI Network; Nicole Aubry – Manager, Central Park Challenge, YAI Network; Bethany Bauman – Associate Director, eCRM, American Diabetes Association; Jonathan Drennan – Senior Consultant, Charity Dynamics

Convio Speaker: April Davis – Consultant, Web Development Services

Now that you know the basics, learn about some of the more advanced features available in TeamRaiser that can help you build a compelling website and get more participants fundraising!



LOCATION
BALLROOM B
PRODUCTS
CONVIO ONLINE
CONVIO APIs
WEB SERVICES

NEW FRONTIERS IN DATA INTEGRATION: CONVIO'S OPEN INITIATIVE

Time: 12:30 - 1:45pm

Guest Speakers: Steve Birnbaum – Chief Operating Officer, Jacobson Consulting Applications; Keith Heller – Principal, Heller Consulting

Convio Speaker: Chris Ojeda – Lead Integration Consultant

Convio's Open Initiative has created exciting opportunities for integrating client data with Convio Online Marketing. New Web Services APIs empower clients to use industry-standard tools to perform data synchronization. Come learn how Convio consultants and partners plan to build new integrations and customize existing ones, including the Convio Connector for RE. We will discuss:

- New possibilities for synchronizing client data with Convio using Web Services.
- How Convio will be leveraging Pervasive Software's Data Integrator tool.
- How Convio integration partners plan to offer custom client integrations.



LOCATION
WEDGWOOD
PRODUCTS
NONE

CONSTITUENT-GENERATED CONTENT: TALES FROM SIERRA CLUB'S COMMUNITIES

Time: 12:30 - 1:45pm

Guest Speakers: Jim Bradbury – Online Communications Manager, Sierra Club; Adrian Cotter – Senior Webmaster, Sierra Club; Aaron Biddar - Vice President of Sales and Marketing, ThePort

Convio Speaker: Ed Melendez – Lead Account Manager

Learn how Sierra Club used Convio Constituent360 and ThePort Network's social networking technologies to create social media enabled sites for three different audiences. During this session, we will show how one of Sierra Club's social media sites, Climate Crossroads, uses social media tools to create campaigns, engage constituents, and collaborate with allies. Learn how the Sierra Club overcame the technical challenge of connecting multiple communities with its house list, how they are transforming "lists" into communities, and what they see on the horizon.

▼ 2:00 - 3:15pm



LOCATION
BALLROOM A
PRODUCTS
EMAIL
FUNDRAISING

GOING BEYOND THE DONATE BUTTON

Time: 2:00 - 3:15pm (repeat session Tuesday, 3:00 - 4:15pm)

Guest Speakers: Todd Turner – Director of Web Ministries, Insight for Living; Michael Cervino – Vice President, Beaconfire Consulting; Nick Allen – Chief Strategy Officer, DonorDigital

Convio Speakers: Vinay Bhagat – Founder and Chief Strategy Officer; Kate Millea – Interactive Consultant

Extend the effectiveness of your online fundraising appeals by looking at factors beyond the appeals themselves. Dive into topics including:

- Optimizing landing pages, donation forms and recurring giving programs.
- Customized ask strings.
- Videos and multimedia that motivate giving.



LOCATION
WEDGWOOD
PRODUCTS
DATASYNC

IMPORT/EXPORT: HOW TO EFFECTIVELY MOVE AND MANAGE YOUR DATA

Time: 2:00 - 3:15pm (repeat session Tuesday, 3:00 - 4:15pm)

Convio Speakers: Cynthia Balusek – Manager, Client Support; John Miller – Client Support Analyst

In this session, learn how to use Convio tools, create processes and follow best practices for moving data in and out of the Convio system. This will include:

- Standard and custom constituent imports.
- Interest and group assignment.
- Standard constituent download.
- Transaction information download.

DAY
3

Nov 18 Wed

PAGE
25



LOCATION
GLASS OAKS
PRODUCTS
TEAMRAISER

TEAMRAISER PARTICIPANT CENTER 2.0: PUTTING THE "FUN" IN FUNDRAISING

Time: 10:15 - 11:30am (repeat session Wednesday, 2:00 - 3:15pm)

Guest Speakers: Heather Lawrence – Manager, Affiliate Race for the Cure, Susan G. Komen; Derek Martin – Associate Director of Donor Services, San Francisco AIDS Foundation

Convio Speaker: Chris Simoes – Software Development Manager, Engineering

Curious about the new Participant Center 2.0? Looking to make it easier for your constituents to raise money for you? Learn how the new Participant Center 2.0 was completely redesigned from the ground up to remove distractions and allow the user to focus on what matters: reaching their fundraising goals. We will detail all of the usability improvements and show off new features that make Participant Center 2.0 the best grassroots fundraising tool on the Internet. Plus, two clients who have already moved their events to Participant Center 2.0 will explain why and answer your questions.



LOCATION
BALLROOM B
PRODUCTS
EMAIL

THE HEALTHY HOUSEFILE: BUILDING AND CULTIVATING YOUR LIST

Time: 2:00 - 3:15pm (repeat session Tuesday, 3:00 - 4:15pm)

Guest Speaker: Alicia Searfross – Internet Marketing Specialist, National Relief Charities

Convio Speaker: Patrick Hansen – Principal Consultant

Is your housefile in good health? This session covers the basics of effective email housefile building and nurturing, including: stewardship; viral offers; simple and effective welcome messages; segmentation planning and constituent profiling. Attendees will learn:

- The baseline metrics for measuring housefile health.
- Tactics and related campaign concepts for building/profiling your housefile.
- Tactics and related activities for profiling/cultivating your housefile.



A big thanks to our scholarship sponsors, Astadia, Donor Digital, Firefly Partners, Paypal, and ThreeSpot Media for helping individuals attend Summit who otherwise would not have been able to make the trip.

CONFERENCE FEATURES

BUSES TO DOWNTOWN AUSTIN

Find out why Austin is called the *Live Music Capital of the World*! Round trip bus rides from the Renaissance hotel to downtown Austin will be provided.

TUESDAY, NOVEMBER 17 | 7:00PM – MIDNIGHT | FRONT OF HOTEL

NONPROFIT TV

Comfortable in front of the camera? Stop by the Nonprofit TV studio and tell us about a great campaign you're running, or share tips and tricks that have made your organization be more successful.

TUESDAY, NOVEMBER 17 | ATRIUM LOBBY (TOP OF THE STAIRS)

CLIENT LOUNGE

Need to get away from the conference for a few minutes? The Client Lounge is a "Convio-free" space just for you. Stop by, sit down and relax. Or, catch up on your email at one of our free email stations.

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | CONCHO

CONNECTION CAFÉ

Find out what others are saying and experiencing at the Summit. Check out Convio's Connection Café blog to read live blogging from the event and to join in on the Summit discussion. www.convio.com/connectioncafe

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | PECOS

EXHIBIT HALL

Visit with companies and organizations that provide services to the nonprofit sector. Talk with them about your organization's ideas and plans, and find out how they can help you turn your dreams into reality.

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | THE ARBOR AND PLAZA FOYER

EXPERT LAB

Take your questions about Convio products or about your own Convio site to the Expert Lab and get them answered. Stop by and speak face-to-face with a Convio expert. Experts will meet with you on a first-come, first-served basis. See live demos of new and exciting tools as well as updates to classic favorites. Demonstrations will include: Common Ground™, CMS, Multi-Center, Convio Open APIs, and much more!

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | SAN MARCOS

USER EXPERIENCE LAB

We want to hear from you! Stop by and say hello, take part in a usability test, or just chat about YOUR experience using Convio. As a token of our appreciation, the first 50 visitors will receive a free \$5 Starbucks card. If you sign up for a 30 minute testing session, we'll enter you in a drawing for an iPod Touch!

TUESDAY & WEDNESDAY, NOVEMBER 17 - 18 | SAN SABA

BIRDS OF A FEATHER DISCUSSION TABLES

Take a break, have a bite, and gather with organizations like yours to network and share ideas. This is your opportunity to connect with your peers who are doing similar work with Convio. Tables will be labeled with discussion topics.

BREAKFAST & LUNCH | WEDNESDAY, NOVEMBER 18 | RIO GRANDE

ACCOUNT MANAGEMENT CENTRAL

Convio account managers want to meet you in person. They'll be available to meet you on a first-come, first-served basis. Be sure to stop by and say hello!

TUESDAY & WEDNESDAY, NOVEMBER 17-18 | BOSQUE



"People said you couldn't swim the Channel, but I proved they could."

— Gertrude Ederle, 1926, first woman to swim the English Channel

Bettman/Corbis

English Channel? How About Multichannel?

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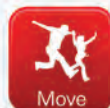
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- To Preserve America's Hiking Trails

**How May
We Help You?**

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TerpSys Is Excited to Be a Convio Implementation Partner, Helping Organizations Engage Their Constituents and Move Them to Action Through Our Listen, Share, Connect, & Move[®] Methodology.

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THEIR CONTRIBUTIONS ARE WHAT MAKE IT ALL POSSIBLE

Landmark Clearing is an integrated technology partner with Convio, offering Electronic Check Processing services to their clients. Processing fees associated with credit cards fluctuate depending on the card, card type, and transaction type. This can create a lot of confusion in trying to petition your donors for a specific dollar amount.

Our electronic check processing fees are always a single flat rate. Our exclusive partnership with Convio allows us to offer a discounted rate for all electronic check transactions. No matter how much your donor gives, it's the same flat cost per donation. Find out how many of your donors have been waiting for a way to give online via check.

- Great for large single-donor or corporate donations
- Flexibility in payment options attracts new donors
- Faster donations to your organization
- New marketable revenue stream for donations



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a great year

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learn more at
www.threespot.com/convio

What is troubling Nonprofit leaders in today's competitive funding environment?

Many face constant pressure to...

- Increase volunteer participation
- Deepen constituent relationships
- Develop secure funding sources: public, corporate and governmental donations
- Raise awareness of their mission

What is Astadia doing about these challenges?

We help optimize online fundraising, donor management, and email marketing.

Most importantly, our clients maintain better relationships with their donors.

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ASTADIA

Grow your email list with Care2!

With 12 million “do-gooder” members, Care2.com is the largest online community of people who want to make a difference. It’s also a wellspring of prequalified donors and supporters seeking to join your cause and help your nonprofit organization.

Valuable new donors and supporters

Using permission-based marketing, Care2’s targeted campaigns recruit high-quality supporters and prospective donors for your organization. Our mostly female members are aged 25 to 65 (average = 39), with strong values and a desire to support health, children, the environment, human rights, and many other causes.

Results-based pricing

You pay only for the leads you receive, eliminating the uncertainty of traditional impressions-based web advertising. We guarantee how many names we deliver, and the delivery date. Care2 also assures unique names with every campaign, further boosting your return on investment.

High volume

Care2 delivers guaranteed results — on time and on budget. Our large size enables us to help you grow your house file very big, very fast.

Easy process

Care2’s experienced campaign team works collaboratively with you on messaging. Then we do all the work to create, launch, track and report on your campaign so you only have to focus on the results.

Grow Your Results.



Read more about Care2’s services for nonprofits at:
www.frogloop.com/care2-nonprofit-services