

# Heather A. O'Connor, Ph.D. candidate, CAP®

curriculum vitae as of December 8, 2020

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## EDUCATION

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### Indiana University

Ph.D. in Philanthropic Studies, Lilly Family School of Philanthropy, expected June 2021

Dissertation title: "Reading Between the Lines: Social Contextual Influences on the Production of and Response to Charitable Appeals."

Committee: Sara Konrath (Chair), Lehn Benjamin, Genevieve Shaker, Ray Haberski

Certificate in College Teaching, Indiana University Center for Teaching and Learning, 2019

Certificate in Fund Raising Management, Lilly Family School of Philanthropy, 2008

### The American College of Financial Services

Chartered Advisor in Philanthropy® (CAP®) designation, 2020

Accredited Estate Planner® (AEP®) designation, expected 2022

### The University of Chicago

Master of Arts in Social Work, School of Social Service Administration, 2005

### University of Tennessee at Knoxville

Bachelor of Science in Public Relations, School of Communications, 1999

## RESEARCH INTERESTS

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I study third sector theory and practice with an emphasis in nonprofit management, fundraising, and philanthropic behavior. My research interests include philanthropic motivations and decision-making, nonprofit communications strategies, and nonprofit pedagogy.

## REFEREED JOURNAL ARTICLES

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Dale, E. & O'Connor, H. (2020) "The Million Dollar Donor Journey: Stages of Development for Women Donors." *International Journal of Nonprofit and Voluntary Sector Marketing*. <https://doi.org/10.1002/nvsm.1680>

O'Connor, H. (2020) "Mindfulness as a Foundation for Reflection: Applying Principles from Dialectical Behavior Training to Service-Learning Instruction." *Journal of Nonprofit Education and Leadership*. 10(2).

## REFEREED BOOK CHAPTERS

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O'Connor, H. (forthcoming). "Writing Compelling Appeals." In *Achieving Excellence in Fundraising, 5th Edition*. Genevieve G., Nathan, S., Tempel, E., Stanczykiewicz, W. (Eds.). John Wiley & Sons.

Dale, E., Shaker, G. & **O'Connor, H.** (2020) "Teaching Philanthropy: Developing Critical and Compassionate Approaches to Giving." In *Teaching Nonprofit Management*. Bezboruah, K. and Carpenter, H., (Eds). Edward Elgar Publishing.

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## UNDER REVIEW

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Mesch, D., Osili, U., Dale, E., Ackerman, J., & **O'Connor, H.** "Charitable giving in married couples: Untangling the effects of education and income on spouses' giving." Invited to revise and resubmit for *Nonprofit and Voluntary Sector Quarterly*.

Lenne, R., Dwyer, P., Wlaschin, J., Rothman, A., & **O'Connor, H.** "Social message framing: Self-presentational motives affect preferential use of gain- and loss-framed statements in interpersonal communication." Invited to revise and resubmit for the *European Journal of Social Psychology*.

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## IN PROCESS

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**O'Connor, H.** & Konrath, S. "Fundraiser fit: How work preference affects the writing of appeals."

**O'Connor, H.** "The unexpected activist: Catholic women's support for pro-choice organizations."

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## REPORTS, WHITE PAPERS & INDUSTRY PUBLICATIONS

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Nathan, S., **O'Connor, H.**, Shaker, G. & Danahey-Janin, P. (forthcoming). "Supporting small shop fundraisers through peer mentoring." *The Chronicle of Philanthropy*.

Nathan, S. & **O'Connor, H.** (2019). "[Perspectives on an old narrative about the fundraising profession.](#)" [invited blog post]. *Fresh perspectives from the world of philanthropy*.

Dale, E., **O'Connor, H.**, Small, D., Mesch, D., Osili, U., & Ackerman, J. (2018). "Giving by and for Women: Understanding High-Net-Worth Donors' Support for Women and Girls." Indianapolis. Women's Philanthropy Institute, Indiana University. <http://hdl.handle.net/1805/15117>

Osili, U., Mesch, D., Ackerman, J., Pactor, A., & **O'Connor, H.** (2018). "How Women and Men Give Around Retirement." Indianapolis. Women's Philanthropy Institute, Indiana University. <http://hdl.handle.net/1805/16758>

Austin, T. & **O'Connor, H.** (2017). "Giving to Religion." In *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016*. Giving USA Foundation. 171-193.

**O'Connor, H.** (2016). "Giving to Human Services." In *Giving USA 2016: The Annual Report on Philanthropy for the Year 2015*. Giving USA Foundation. 183-200.

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## BOOK REVIEWS

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**O'Connor, H.** (2019). [Rev. of Goldseker, S., & Moody, M. (2017). *Generation Impact: How Next Gen Donors are Revolutionizing Giving.*] *Nonprofit and Voluntary Sector Quarterly*. [DOI 10.1177/0899764019855947](https://doi.org/10.1177/0899764019855947)

**O'Connor, H.** (2008). [Rev. of Heath, C. & Heath, D. (2007) *Made to Stick: Why Some Ideas Survive and Others Die*] *Perdido Magazine: Leadership with a Conscience*. 12, 24-25.

## CONFERENCE PRESENTATIONS

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**O'Connor, H.** (2019). "For the Cause: Exploring Professional Development and Identity Among Fundraisers in Rural Alaska." Paper presentation, ARNOVA National Conference, San Diego, Nov. 21

Nathan, S., Shaker, G., **O'Connor, H.**, & Danahey-Janin, P. (2018). "Breaking the Isolation: Fundraisers, Informal Support Groups, and Professional Growth." Poster presentation, ARNOVA National Conference, Austin, Nov. 15-17. <https://scholarworks.iupui.edu/handle/1805/23792>

Dale, E., & **O'Connor, H.**, (2018) "Million-Dollar Gifts by and for Women: A New Model of Philanthropy?" Paper presentation, ISTR International Conference, Amsterdam, July 12.

**O'Connor, H.**, Konrath, S., Goodwin, J., & Austin, T. (2018). "Effects of Teamwork on the Fundraiser Experience." Paper presentation, ISTR International Conference, Amsterdam, July 10.

**O'Connor, H.**, Austin, T., & Goodwin, J. (2017). "Are Two Heads Better than One? Effects of Working as a Team vs. Alone on Fundraising Effectiveness and Fundraiser Satisfaction." Paper presentation, ARNOVA National Conference, Grand Rapids, Nov. 16.

**O'Connor, H.** (2015). "Professional Development for Nonprofit Leaders in Rural Alaska: Perceptions, Access, Utilization, and Needs." Paper presentation, ARNOVA National Conference, Chicago, Nov. 19.

## TEACHING & CURRICULA DEVELOPMENT

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**Part-Time Instructor**, 2020 – Present

**The American College of Financial Services, Chartered Advisor in Philanthropy (CAP) program**

Co-facilitate study groups for:

GS 839 Planning for Philanthropic Impact in the Context of Family Wealth (graduate, synchronous online, 10 weeks)

GS 849 Charitable Giving Strategies (graduate, synchronous online, 10 weeks)

GS 859 Gift Planning in a Nonprofit Context (graduate, synchronous online, 10 weeks)

GS 869 Practicum I: Legacy Planning Reimagined (graduate, synchronous online, 10 weeks)

**Adjunct Faculty Member**, 2018 – Present

**The Fund Raising School, Indiana University Lilly Family School of Philanthropy**

Principles and Techniques of Fundraising (in-person, four days), 2018, 2019

Fundraising for Small Nonprofits (asynchronous online, three weeks), 2020

**Curriculum Developer/Doctoral Graduate Assistant**, 2019 – 2020

**The Fund Raising School, Indiana University Lilly Family School of Philanthropy**

Developed professional development workshops for third sector leaders:

Understanding Philanthropy (blended, two days)

Developed course developed for new Certificate in Philanthropic Leadership

Strategic Planning for Nonprofits (synchronous online, one day)

Customized seminar for a national organization

**Instructor, 2018 – 2020**

**Indiana University Lilly Family School of Philanthropy**

Philanthropic Studies 558: Principles and Practices of Fundraising (graduate)  
Summer 2020 (asynchronous online, 16 weeks)  
Fall 2019 (asynchronous online, 16 weeks)

Philanthropic Studies 105: Giving and Volunteering in America. (undergraduate)

Incorporated service-learning and other high-impact, evidence-based practices within a themed learning community of 25 students.

Summer 2019 (asynchronous online, 8 weeks)  
Spring 2019 (blended course, 16 weeks)  
Fall 2018 (blended course, 16 weeks)

**Doctoral Graduate Assistant, 2016 – 2017**

**Indiana University Lilly Family School of Philanthropy**

Assisted in the development of two new Certificates in Philanthropic Fundraising at the graduate and undergraduate levels. Researched and drafted program proposals; developed syllabi, created course outlines and assignments for four courses:

Institutional Donor Dynamics (undergraduate, in-person, 16 weeks)  
Individual Donor Motivations and Engagement (undergraduate, in-person, 16 weeks)  
Donor Behavior in Major and Planned Giving (graduate, asynchronous online, 16 weeks)  
Institutional Donors (graduate, asynchronous online, 16 weeks)

**Adjunct Faculty, 2013 – 2015**

**Kenai Peninsula College, University of Alaska Anchorage**

Developed and taught Introduction to Grant Proposal Writing. Professional development course for adult learners (in-person, one-day course offered each fall).

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**RESEARCH EXPERIENCE**

**Doctoral Research Assistant, Women's Philanthropy Institute (WPI)**

**Indiana University Lilly Family School of Philanthropy, 2017 – 2019**

Assisted with quantitative and qualitative research on gender differences in giving around retirement and understanding high-net-worth donors' support for women and girls. Tasks included literature reviews, survey preparation, and drafting white papers.

**Doctoral Research Assistant**

**Indiana University Lilly Family School of Philanthropy, Summer – Fall 2017**

Conducted and coded individual and focus group interviews on fundraisers' informal support groups and professional growth.

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**NONPROFIT LEADERSHIP EXPERIENCE**

**Executive Director**

**Kachemak Bay Family Planning Clinic, 2012 – 2016 (Homer, Alaska)**

Led a nonprofit reproductive health organization offering direct clinical services, community health outreach, and teen education programs for an average of 1,000 clients each year;  
Managed partnerships with Title X and the State of Alaska Breast and Cervical Health Check program;  
Diversified funding sources and increased revenue from \$492,000 to \$735,000;  
Received the 2016 Alaska Community Service Award by the Alaska Public Health Association

### **Vice President, Development**

#### **Dental Lifeline Network, 2010 – 2012 (Denver, Colorado)**

Managed major gifts, foundation relations, and annual fund programs for an organization that provides treatment through a volunteer network of 15,000 dentists and 3,200 dental labs nationwide;  
Increased number of individual donors by 31% and corporate donors by 17%;  
Secured the second-highest gift in the 37-year history of the organization

### **Major Gift Officer**

#### **Samaritan Health Services, 2008 – 2010 (Corvallis and Newport, Oregon)**

Managed a portfolio of 100 prospective donors across a tri-county healthcare system with five hospitals and three simultaneous capital campaigns;  
Secured gifts between \$10,000 and \$100,000 from individuals and corporate donors;  
Conducted a feasibility study for a \$3.2M capital project

### **Director of Development and Communications**

#### **Lakeview Pantry, 2007 – 2008 (Chicago, Illinois)**

Planned and managed the annual fund, foundation relations, and public relations programs for a food pantry that served an average of 500 individuals a week;  
Increased revenue by 16% in first 12 months; successfully closed gifts of up to \$50,000 from individual, foundation and corporate donors as well as grants from state and federal government;  
Increased annual renewal rate 20%, and increased donors enrolled in monthly pledge program 27%.

### **Assistant Director, Leadership Giving and Assistant Director, Donor Relations**

#### **The University of Chicago, 2005 – 2007 (Chicago, Illinois)**

Managed a portfolio of 200 prospective donors and ensured timely and strategic cultivation, solicitation and acknowledgment activities;  
Secured annual and restricted gifts of \$1,000 to \$10,000;  
Produced over 200 individualized stewardship reports for donors of named, endowed undergraduate scholarships; ensured proper reporting and acknowledgment;  
Drafted personalized acknowledgment letters for signature by the President of the University

### **Development Associate**

#### **Trinity Services, Inc., 2002 – 2005 (Joliet, Illinois)**

Drafted press releases, donor acknowledgments, and program brochures for an organization that provides services for children and adults with developmental disabilities

### **Account Representative**

#### **Summit Consulting Group, Inc., 1999 – 2002 (Chicago, Illinois)**

Wrote copy and coordinated nonprofit accounts at a corporate communications and public affairs firm

## **ADDITIONAL TRAINING & CERTIFICATION**

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### **The American College of Financial Services**

Chartered Advisor in Philanthropy (CAP) designation, 2020  
Accredited Estate Planner (AEP) designation, expected 2022

### **Certificate in College Teaching**

Indiana University Center for Teaching and Learning, 2019

**Grounded Theory Workshop**

Indiana University Center for Professional Development and Lifelong Learning, 2018

**The Collaborative Institutional Training Initiative (CITI)**

Human Subjects Research series, 2015, 2017, 2019

**Certificate in Fundraising Management**

The Fund Raising School, Indiana University Lilly Family School of Philanthropy, 2008

**Certified Fundraising Executive**

CFRE International, 2008

**GRANTS, FELLOWSHIPS & AWARDS**

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Fellow, Women's Philanthropy Institute (WPI), Lilly Family School of Philanthropy at Indiana University, 2020. \$5,000.

Emerging Scholar Award. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2019.

Debra Mesch Doctoral Fellowship for Research in Women's Philanthropy. The Lilly Family School of Philanthropy at Indiana University, 2019.

Teaching Award for Doctoral Students. The Lilly Family School of Philanthropy at Indiana University, 2019. \$500.

Ernest W. Wood Fellowship. The Lilly Family School of Philanthropy at Indiana University (in partnership with AFP Foundation for Philanthropy), 2017, 2018, 2020

Ph.D. Seminar, 13th International Conference in Amsterdam. International Society for Third-Sector Research (ISTR), 2018.

Nominee, Sherry Queener Graduate Student Excellence Award. Indiana University Purdue University Indianapolis (IUPUI), 2018.

Travel Support Award. 13th International Conference in Amsterdam, International Society for Third-Sector Research (ISTR), 2018. \$100.

Graduate and Professional Education Grant. Indiana University Purdue University Indianapolis, 2018. \$500.

Nancy Macduff Scholarship. Practicums Section, Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2017. \$300.

Graduate Student Research Grant. Lilly Family School of Philanthropy at Indiana University, 2017. \$3,200.

David H. Jacobs Fellowship. The Lilly Family School of Philanthropy at Indiana University, 2016.

Conference Scholarship and Travel Grant. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2015. \$250.

The Kresge Foundation Executive Masters Scholarship. The Lilly Family School of Philanthropy at Indiana University, 2015.

Professional Development Scholarship. Association of Fundraising Professionals (AFP) Alaska Chapter, 2014. \$300.

Professional Development Scholarship. Association of Fundraising Professionals (AFP) Chicago Chapter, 2008. \$300.

Dottie Rosso Scholarship Fund. The Fund Raising School (TFRS). Indiana University. 2008. \$500.

International Conference Travel Award, Association of Fundraising Professionals (AFP) Chicago Chapter, 2007. \$300.

School of Social Service Administration Scholarship Award. The University of Chicago, 2003, 2004.

## **UNIVERSITY & DEPARTMENTAL SERVICE**

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### **The Lilly Family School of Philanthropy at Indiana University**

Invited judge, Behavioral Experiments in Philanthropy (P-630) graduate student competition, 2020

Member, Tim Seiler Scholarship Selection Committee, The Fund Raising School, 2019– 2020

Member, Professional Doctoral Degree Task Force, 2018 – 2020

Member, Ph.D. Program Student Task Force, 2018– 2019

Member, Academic Programs Committee, 2017– 2019

Invited judge, Behavioral Experiments in Philanthropy (P-630) graduate student competition, 2018

Mentor, Undergraduate Service Learning Assistant Program, 2018– 2019

### **The University of Chicago School of Social Service Administration**

Member, Professional Development Committee, 2005 – 2010

## **SERVICE TO PROFESSION**

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### **Committees and Conferences**

Panel Organizer, “Message Strategies in Fundraising and Volunteer Recruitment.” Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) Conference, 2020

Co-Founder, Common Interest Group in Message Framing, ARNOVA, 2019 – Present

Treasurer, Pracademics Section, ARNOVA, 2017 – 2019

Discussant, “Formalizing the Relationship Between Practitioners and Academics: Making the Data Connection.” ARNOVA Conference, San Diego, 2019

### **Peer Review**

*International Journal of Nonprofit and Voluntary Sector Marketing*

*Journal of Nonprofit Education and Leadership (JNEL)*

*Nonprofit Management and Leadership (NML)*

*Nonprofit and Voluntary Sector Quarterly (NVSQ)*

*Voluntas: International Journal of Voluntary and Nonprofit Organizations*

## **MEDIA COVERAGE**

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Eisenberg, R. (2018, July 24). What Retirement Means for Charitable Giving and Volunteering. *Forbes*. Retrieved from forbes.com

*Philanthropy News Digest*. (2018, Feb. 1). Female Donors to Women's and Girls' Causes Embrace Risk, Study Finds. Retrieved from philanthropynewsdigest.org

Joslyn, H. (2018, Jan. 31). Wealthy Women Donors Willing to Take Big Risks, Report Says. *Chronicle of Philanthropy*. Retrieved from philanthropy.com

## **PROFESSIONAL AFFILIATIONS**

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### **Association of Fundraising Professionals (AFP)**

Member, Peer Mentoring Committee, Chicago Chapter, 2006 – 2008  
Member, 2005 – Present

### **Academy of Management**

Member, Public and Nonprofit Division, 2017 – Present

### **Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)**

Co-Founder, Message Framing Common Interest Group, 2019 –Present  
Treasurer, Pracademics Section, 2018 –2020  
Member, Pracademics Section, Early Scholars Section, 2013 – Present

### **International Society for Third-Sector Research (ISTR)**

Member, 2013 – Present

### **International Association of Advisors in Philanthropy (AiP)**

Member, 2020– Present

### **National Association of Charitable Gift Planners (CGP)**

Member, 2020– Present

### **Purposeful Planning Institute (PPI)**

Member, 2020– Present

### **Society for the Psychological Study of Social Issues (SPSSI)**

Member, 2018– Present