

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

curriculum vitae as of April 25, 2021

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EDUCATION

Indiana University

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

Dissertation: *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

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

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

The American College of Financial Services

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

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

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

Mesch, D., Osili, U., Dale, E., Ackerman, J., & **O'Connor, H.** (2021). "Charitable giving in married couples: Untangling the effects of education and income on spouses' giving." *Nonprofit and Voluntary Sector Quarterly*. <https://journals.sagepub.com/doi/10.1177/08997640211008983>

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*. 26(1). <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). <https://js.sagepub.com/jnel/issue/view/986>

REFEREED BOOK CHAPTERS

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. <https://www.e-elgar.com/shop/gbp/teaching-nonprofit-management-9781788118668.html>

UNDER REVIEW

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*.

IN PROCESS

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

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

REPORTS, WHITE PAPERS & INDUSTRY PUBLICATIONS

Nathan, S., **O'Connor, H.**, Shaker, G. & Danahey-Janin, P. (2021). "[Fundraisers at small nonprofits need more support. Peer mentoring is an easy, low-cost answer.](#)" *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.

BOOK REVIEWS

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*, 48(6).

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

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.

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

Part-Time Instructor, 2020 – 2021

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)

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).

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.

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

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

Inductee, Nu Lambda Mu International Honor Society, the Nonprofit Academic Centers Council (NACC)

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. Pracademics 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

The Lilly Family School of Philanthropy at Indiana University

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

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

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

Rusnak, C. (2021, Jan. 29). How do beliefs and identities influence women's philanthropy? Let's look at the research. *Fresh Perspectives From the World of Philanthropy*. Retrieved from blog.philanthropy.iupui.edu

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

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

Purposeful Planning Institute (PPI)

Member, 2020 – Present

Society for the Psychological Study of Social Issues (SPSSI)

Member, 2018 – Present