

## Heather O'Connor, Ph.D., CFRM, CAP®

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### AFFILIATIONS

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#### Ronin Institute

Research Scholar, 2022 – Present

#### American College of Financial Services, Center for Philanthropy and Social Impact

Research and Evaluation Consultant, 2020 – Present

### EDUCATION

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#### Indiana University

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

Dissertation: *Reading between the lines: Social contextual influences on the production of and response to charitable appeals*

#### 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

### REFEREED JOURNAL ARTICLES

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**O'Connor, H.** (2022). "The unexpected activist: Catholic women's support for pro-choice organizations." *Journal of Philanthropy and Marketing*. <https://onlinelibrary.wiley.com/doi/epdf/10.1002/nvsm.1767>

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.sagamorepub.com/jnel/issue/view/986>

### EDITED VOLUMES

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Carpenter, H., Dolch, N., **O'Connor, H.** (Eds.). (forthcoming). *Nonprofit Public Relations: A Critical Approach*. Sagamore Publishing.

## BOOK CHAPTERS

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**O'Connor, H.** (forthcoming). "Public Relations Theories in the Nonprofit Context." In *Nonprofit Public Relations: A Critical Approach*. Carpenter, H., Dolch, N., O'Connor, H. (Eds.). Sagamore Publishing.

**O'Connor, H.** (2022). "Writing Compelling Appeals." In *Achieving Excellence in Fundraising, 5th Edition*. Shaker, G., Nathan, S., Tempel, E., Stanczykiewicz, W. (Eds.). John Wiley & Sons.  
<https://www.wiley.com/en-us/Achieving+Excellence+in+Fundraising%2C+5th+Edition-p-9781119763758>

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

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**O'Connor, H.** & Konrath, S. "Fundraiser fit: How teamwork and work preference affect the writing of appeals." Invited to revise and resubmit for *Nonprofit Management and Leadership*.

## REPORTS, WHITE PAPERS & INDUSTRY PUBLICATIONS

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**O'Connor, H.**, Yuen, D., Krause, I. (2022) "Philanthropic advisors in the 21<sup>st</sup> century: Holders of the Chartered Advisor in Philanthropy® (CAP®) designation." Center on Philanthropy and Social Impact, American College of Financial Services.

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

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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*, 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

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**O'Connor, H.** (2021). "The unexpected activist: Catholic women's support for pro-choice organizations." Paper presentation, ARNOVA National Conference, Atlanta, Nov. 19.

**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.

## INVITED TALKS

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**O'Connor, H.** (2022). "The mutual benefits of researcher and practitioner collaborations: The National Audubon Society example." Panel guest for webinar hosted by Research4Impact and the Climate Advocacy Lab. May 18.

**O'Connor, H.** (2022). "Fundraiser fit: How teamwork and work preference affect the writing of appeals." Panel guest for the Science of Philanthropy Initiative (SPI) webinar April 7.

Nathan, S., **O'Connor, H.**, Shaker, G. (2022). "How to get the most out of your mentor relationship." Association of Fundraising Professionals (AFP) webinar, March 23.

**O'Connor, H.** (2022). "Challenge or Opportunity? A Discussion of Research on Women's Pro-choice Philanthropy Conducted During COVID-19." Philanthropy Research Workshop, Indiana University Lilly Family School of Philanthropy, Feb. 8.

Nathan, S., **O'Connor, H.**, Shaker, G. (2022). "Thank you for being a friend: Forming communities of support for fundraisers." Association of Fundraising Professionals (AFP) webinar, Jan. 25.

**O'Connor, H.** (2021). "A New Perspective on Karoff's Philanthropic Curve: Data from HNW Women Donors." Chartered Advisor in Philanthropy (CAP) webinar, Nov. 10.

**O'Connor, H.** (2021). "Peer Mentoring." Association of Fundraising Professionals (AFP) Western PA Chapter webinar, Sept. 8.

Drezner, N. & **O'Connor, H.** (2019). "Queering Philanthropy: Understanding emerging research on LGBTQ+ donors." Interviewed Dr. Drezner for a Mays Family Institute on Diverse Philanthropy podcast.

## **RESEARCH EXPERIENCE**

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### **Research, Evaluation, and Programs Consultant, Center for Philanthropy and Social Impact The American College of Financial Services, 2020 – Present**

Conduct research on needs and opportunities for the education of philanthropic advisors. Evaluate existing training programs. Design and oversee mixed-methods research to capture experiences unique to advisors of color and LGBTQ+ advisors to inform the design of new programs.

### **Doctoral Fellow, Women's Philanthropy Institute (WPI) Indiana University Lilly Family School of Philanthropy, 2020 – 2021**

Completed dissertation research as a recipient of the 2020 Debra Mesch Doctoral Fellowship for Research on Women's Philanthropy.

### **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 development and design, and drafting white papers.

### **Doctoral Research Assistant Indiana University Lilly Family School of Philanthropy, 2017**

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

## **TEACHING & CURRICULA DEVELOPMENT**

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### **Adjunct Instructor, 2018 – 2022 Indiana University Lilly Family School of Philanthropy**

Philanthropic Studies 558: Principles and Practices of Fundraising (graduate)  
Summer 2022, Summer 2020 (asynchronous online, 12 weeks, in Canvas LMS)  
Fall 2019 (asynchronous online, 16 weeks, in Canvas LMS)

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, Spring 2019 (asynchronous online, 8 weeks, in Canvas LMS)  
Fall 2018 (blended course, 16 weeks, in Canvas LMS)

**Adjunct Faculty Member, 2018 – 2022**

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

Fundraising for Small Nonprofits (asynchronous online, three weeks, in Canvas LMS)  
Principles and Techniques of Fundraising (in-person, four days)

**Adjunct Faculty Member, 2021 – 2022**

**Louisiana State University Shreveport, Master of Science in Nonprofit Administration**

Nonprofit Administration 706: Nonprofit Administration Research Methods (graduate)  
Spring 2022 (asynchronous online, 7 weeks, in Moodle LMS)

Nonprofit Administration 764: Seminar in Resource Development (graduate)  
Fall 2021 (asynchronous online, 7 weeks, in Moodle LMS)

Nonprofit Administration 762: Nonprofit Resource Development (graduate)  
Spring 2022, Fall 2021 (asynchronous online, 7 weeks, in Moodle LMS)

**Instructor, 2020 – 2021**

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

Created content and facilitated synchronous online study groups for:

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

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

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

**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, in Canvas LMS)

Developed course developed for new Certificate in Philanthropic Leadership

Strategic Planning for Nonprofits (synchronous online, one day)

Customized seminar for a national organization

**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 (in-person, one-day professional development course offered each fall).

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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 1,200 clients each year;  
Developed initiatives for marketing communications, fundraising, volunteer recruitment, and community partnerships that diversified funding sources and increased revenue by 38%;  
Managed program evaluation and reporting to federal, state, and foundation funders;  
Directed a team of 12 FTE employees across three programs;  
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 provided 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 largest gift in the 37-year history of the organization;  
Trained and supervised a team of 5 FTE development professionals

### **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 18% 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 gifts of \$1,000 to \$10,000;  
Produced over 200 individualized stewardship reports for donors of endowed scholarships;  
Drafted personalized acknowledgment letters for signature by the President of the University

### **Development Associate**

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

Wrote press releases, charitable appeals, donor acknowledgments, and program brochures for an organization that provided services for children and adults with developmental disabilities

### **Account Representative**

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

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

## **ADDITIONAL TRAINING & CERTIFICATION**

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**Certificate in Market Research**  
University of California, Davis, 2021

**Philanthropic Solutions in Financial Planning Certificate**  
Financial Planning Association® (FPA®) and The American Heart Association, 2021

**Chartered Advisor in Philanthropy® (CAP®) designation**  
The American College of Financial Services, 2020

**The Collaborative Institutional Training Initiative (CITI)**  
Human Subjects Research, Social/Behavioral Researchers (ID 38340 & 40253) 2014, 2017, 2020-2023

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

**Grounded Theory Workshop**  
Indiana University Center for Professional Development and Lifelong Learning, 2018

**Graduate Certificate in Fund Raising Management (CFRM)**  
The Fund Raising School at the Indiana University Lilly Family School of Philanthropy, 2008

**Certified Fundraising Executive**  
CFRE International, 2008

## **GRANTS, FELLOWSHIPS & AWARDS**

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Nu Lambda Mu International Honor Society, Nonprofit Academic Centers Council (NACC), 2021

Fellow, Women's Philanthropy Institute (WPI), Lilly Family School of Philanthropy at Indiana University, 2020

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

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

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

Nancy Macduff Scholarship. Pracademics Section, Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), 2017

Graduate Student Research Grant. Lilly Family School of Philanthropy at Indiana University, 2017

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

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

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

Dottie Rosso Scholarship Fund. The Fund Raising School (TFRS). Indiana University, 2008

International Conference Travel Award, Association of Fundraising Professionals (AFP) Chicago Chapter, 2007

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

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## **UNIVERSITY & DEPARTMENTAL SERVICE**

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

Member, Middle States Commission on Higher Education Accreditation Standard V Work Group, 2021

### **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

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## **SERVICE TO PROFESSION**



## **Committees and Conferences**

Co-Founder, Common Interest Group in Message Framing, ARNOVA, 2019 – 2022

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

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)*

*Philanthropy and Education*

*Voluntas: International Journal of Voluntary and Nonprofit Organizations*

## **PROFESSIONAL AFFILIATIONS**

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### **Qualitative Research Consultants Association (QRCA)**

Member, 2021 – Present

### **American Evaluation Association (AEA)**

Member, 2021 – Present

### **Market Research Society (MRS)**

Certified Member, 2021 – Present

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

Co-Founder, Message Framing Common Interest Group, 2019 – 2022

Treasurer, Pracademics Section, 2018 – 2020

Member, Pracademics, Early Scholars, and Teaching Sections 2015 – Present

### **European Research Network on Philanthropy (ERNOP)**

Member, 2019 – Present

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

Member, 2015 – Present