

Heather O'Connor, Ph.D., CFRM, CAP®
Curriculum vitae as of December 2022
Heather@HeatherAOConnor.com • HeatherAOConnor.com

ACADEMIC AFFILIATIONS

Ronin Institute

Research Scholar, 2022 – Present

EDUCATION

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

RESEARCH EXPERIENCE

Vice President, Research and Learning

Daylight Advisors, 2022 – Present

Provide commissioned research and curriculum development services to support philanthropic advisors and the families they serve.

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 mixed-methods 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

Conducted literature reviews, developed surveys in Qualtrics, and drafted articles and white papers on gender differences in giving around retirement and high-net-worth donors' support for women and girls.

Doctoral Research Assistant

Indiana University Lilly Family School of Philanthropy, 2016 – 2017

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

REFEREED JOURNAL ARTICLES

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

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

BOOK CHAPTERS

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>

REPORTS, WHITE PAPERS & INDUSTRY PUBLICATIONS

O'Connor, H., Yuen, D., Krause, I. (2022) "[Philanthropic advisors in the 21st 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

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. (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

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.

TEACHING & CURRICULA DEVELOPMENT

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).

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

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

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

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

SERVICE TO PROFESSION

Committees and Conferences

Co-Chair, Communications Working Group, Ronin Institute

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

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