

# MASTERING THE MAJOR GIFT PROCESS

March 18-19, 2010  
San Diego, CA



**“This was not your standard fundraising conference. Creative and innovative solutions to old problems were offered. Jim’s flexibility in allowing participants to help shape some of the discussions was novel and very effective.”**

*Julia Horn, Director of Development,  
University of Montana Foundation*

**“I’ve attended several other conferences over the past six years and this, by far, was absolutely the best in terms of information acquired, content, and presenter.”**

*Tim Brennan, Vice President of Institutional Advancement,  
D’Youville College*

**“Excellent conference! The speaker was clear and concise and full of marvelous ideas for us. His experience in three very different universities made his insights applicable for all. I will highly recommend Academic Impressions conferences to our deans and other administrators.”**

*Anne S. Wright, Major Gifts Officer, Elon University*

**“This class is a must-attend for seasoned development officers and deans. It offers fresh ideas and helps to explain the unsolved mysteries of fundraising.”**

*Gregory Gibbs, Director, Development,  
College of Engineering, University of California, Davis*

**“This conference provided excellent subject-specific coverage for all North American educational institutions who are interested in improving their fundraising capacity.”**

*Brian D. Campbell, Director, Resource Development &  
Director, Foundation, Confederation College*

ACADEMIC ■ IMPRESSIONS

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## OVERVIEW

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The recent economic downturn has only increased the complexity and competitiveness of 21st century fundraising. Join us in San Diego to experience a highly-rated, two-day session on an innovative and comprehensive approach to securing major gifts.

Situating the seminar in the cultural phenomenon he calls the "American Philanthropic Revolution," Jim Langley, founder of Langley Innovations and immediate past vice president of advancement at Georgetown University, explores all phases and aspects of the development process, including:

- Identification
- Prospecting
- Discovery
- Creative engagement
- Project assignment
- Solicitation
- Stewardship

## WHO SHOULD ATTEND

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All professionals directly responsible for cultivating and raising major gifts – including senior development officials, major gift officers, academic leaders, and board members – will gain a new perspective on effective fundraising work.

## WHAT YOU WILL LEARN

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Jim will show you how to determine donor interest and align it with your institution's strategic objectives. His system will help you question the efficacy of many established practices and, through the use of case studies, demonstrate more rewarding and realistic ways to work with prospects. You will leave the event with a more compelling vision for securing the resources necessary to advance your institution's mission.

## A TEAM EFFORT

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This event offers a unique opportunity to systematically re-think — from prospecting to stewardship — your approach to securing transformational gifts for your institution. As such, we recommend bringing a team including senior advancement leaders, gift officers, academic leaders, board members, and presidents.

**Learn an  
innovative and  
comprehensive  
approach to  
improving your  
fundraising  
performance.**

## AGENDA

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THURSDAY, MARCH 18, 2010

8:30 – 9:00 a.m.      **Registration and Continental Breakfast (included in registration)**

9:00 – 10:15 a.m.      **Setting the Scene: The Culture of Philanthropy**

*Last year, Americans gave nearly \$300 billion in philanthropic gifts. How much of that remarkable support is the result of fundraising technique and how much can be attributed to specific cultural factors? A better understanding of American philanthropic culture will help you develop more effective fundraising techniques. This session explores the answers to the fundamental questions of:*

- *Why do Americans give so much?*
- *In what cultural phenomena are our philanthropic tendencies rooted?*
- *How can a better understanding of those roots make us more effective fundraisers?*
- *How can we appeal to donors' highest and best instincts?*

10:15 – 10:30 a.m.      **Morning Break**

10:30 – 11:45 a.m.      **Understanding Donor Perceptions and Trends**

*Research is beginning to reveal some surprising clues about why donors give. The trends are changing. Individuals with large net worth demonstrate philanthropic behaviors that vary from overall patterns, and the rise of entrepreneurial wealth is creating a new era and a new kind of philanthropy. This session will explore current perceptions and trends to help you pinpoint the most promising opportunities and pursue them with the greatest probability of success.*

11:45 a.m. – 1:00 p.m.      **Lunch (included in registration)**

1:00 – 2:00 p.m.      **Defining the Process: The Phase and Flow Model**

*The classic identification-to-cultivation-to-solicitation model fails to effectively develop and deliver compelling cases for support. The innovative phase-and-flow model solves that problem. During this session, you will learn how the model functions along with how it makes major gift work more efficient, better measured, and more productive.*

2:00 – 2:45 p.m.      **Working Session: Analyzing Your Cultivation Processes**

*After walking through the phase and flow model, you will break into small groups to analyze your institution's current donor cultivation processes and identify areas where you may want to pull in best practices from the model. You will also have the opportunity to ask questions about how to best apply the principles of the model to your institutional setting.*

2:45 – 3:00 p.m.      **Afternoon Break**

3:00 – 4:15 p.m.      **Identification and Prospecting**

*A shift of focus from capacity to propensity can dramatically increase the success of your development operation. This session will explore practical examples to show how a rigorous analysis of these variables will lead to more successful solicitations.*

4:15 – 5:00 p.m.      **Discovery and Creative Engagement**

*The discovery and creative engagement phases of the model deal explicitly with the art and science of the major gift process. Highly innovative – yet proven – approaches will be shared, including:*

- *Conducting discovery interviews to reveal donors' giving interests*
- *Using students or volunteers as interviewers*
- *Designing creative programs that engage prospects in the life of your institution*

5:15 – 6:15 p.m.      **Networking Reception (included in registration)**

## AGENDA

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FRIDAY, MARCH 19, 2010

- 8:30 – 9:00 a.m.      **Continental Breakfast (included in registration)**
- 9:00 – 10:30 a.m.      **Project Assignment**  
*The assignment of prospects to projects is the heart of phase and flow model of securing major gifts. American philanthropy is project-oriented, yet many institutions define only broad goals that have limited donor appeal. This session will provide specific examples of how your institution can translate its goals into compelling projects that will induce higher levels of philanthropic support.*
- 10:30 – 10:45 a.m.      **Morning Break**
- 10:45 a.m. – 12:00 p.m.      **Solicitation and Stewardship**  
*The strategic use of solicitations, not only to secure commitments but also to plant seeds and further engage the donor, is a key component of the phase and flow model. This session will challenge, if not debunk, many long-held assumptions about soliciting gifts and address many important questions, including:*
- *Do we rush to solicitation and thereby fail to optimize the potential of most donors?*
  - *Are too many solicitations a form of ambush?*
  - *Should we press for an answer at the solicitation or make sure we avoid a “no”?*
- 12:00 – 1:15 p.m.      **Lunch (included in registration) and Working Session: Developing Compelling Projects**  
*Prior to the conference, you will be asked to identify a challenging fundraising initiative at your institution. During lunch, you will work in small groups to develop your initiative into a more compelling case for donors. Your group will brainstorm important elements and perspectives of different donors and how to frame your initiative for different types of donors.*
- 1:15 – 1:45 p.m.      **Discussion: Feedback on Projects**  
*Following lunch, you will share your compelling case you developed during lunch. Jim and your colleagues in attendance will offer feedback and additional ideas for developing your case further.*
- 1:45 – 3:15 p.m.      **Effective Use of Academic Leaders and Volunteers**  
*A perennially challenging issue, this session will help you explore the role academic leaders and volunteers can play in securing major gifts. In a lively session that encourages strong interaction among conference participants, these and similar questions will be explored:*
- *When do you enlist the aid of others in the fundraising process?*
  - *Is peer solicitation a thing of the past?*
  - *Are most volunteers more trouble than they are worth?*
  - *Do we ask too much of our presidents?*
  - *How do we make effective use of our deans and other academic leaders?*
  - *How do you break in a neophyte or socially-awkward academic dean?*
  - *How do you decide who should be in on a solicitation?*
- 3:15 – 3:30 p.m.      **Afternoon Break**
- 3:30 – 5:00 p.m.      **Recessionary Strategies, Conference Wrap Up and Next Steps**  
*This final interactive session will give you the opportunity to ask any unanswered questions and provide you the opportunity to delve deeper into particular topics, including fundraising during difficult economic climates. You’ll then spend time discussing what your next steps should be so you can hit the ground running when you get back on campus to advance your institution’s philanthropic goals.*

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## INSTRUCTOR



### **James M. Langley, Founder and President, Langley Innovations**

Before forming his own comprehensive advancement consulting firm, Jim served as vice president for advancement at Georgetown University. At Georgetown, he led the institution's offices of alumni relations, communications, governmental and community relations, health sciences development, information and financial systems, and university development. During his tenure, he produced record numbers in new commitments and cash despite a difficult economy and launched a number of innovative programs, including the Student Discovery Initiative which uses current students to interview alumni who have been only occasionally engaged with the university.

Jim arrived at Georgetown after spending eight years as the vice president for advancement at the University of California, San Diego. At UCSD, he led the planning and execution of the institution's seven-year \$1 billion campaign, then raised almost half the target amount in three years, despite a weak economy. He also expanded and improved outreach to key constituencies, increased and strengthened volunteer participation, acted as university spokesperson, and implemented programs that improved community relations. During Jim's tenure, significant increases were posted in federal funding, national and international publicity, and alumni participation.

Before arriving at UCSD, he served as vice president for external affairs at the Georgia Institute of Technology. At Georgia Tech, Jim increased annual gift income from \$26 million to \$76 million and more than tripled the institution's endowment to well over \$500 million. He began his career in higher education at Miami University and served at the University of Cincinnati as well as the University of Massachusetts. Operations under Jim's management have won awards in virtually every area of university advancement.

## HOTEL RESERVATIONS

The conference will be held at:



Loews Coronado Bay Resort  
4000 Loews Coronado Bay Road,  
Coronado, CA 92118

To reserve your room, call (619) 424-4000. Please indicate that you are with the Academic Impressions group to receive the room rate of \$169 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of March 17 – 18, 2010. Reservations must be made by February 22, 2010. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Loews Coronado Bay Resort & Spa is situated on a private 15-acre peninsula surrounded by the Pacific Ocean and the Coronado Bay, just minutes from downtown Coronado. This luxury California resort is across the street from Silver Strand State Beach, four miles from Coronado Village and nine miles from downtown San Diego. In addition to private beach access and breathtaking views of the San Diego Bay, the resort features The Market Cafe, Azzura Point Restaurant, La Cantina Bar and Grill, and Cays Lounge. Downtown Coronado also offers the Ferry Landing Marketplace, a bayside complex comprised of charming shops and restaurants.

### **CFRE Continuing Education Credits**

Full participation in Mastering the Major Gifts Process is applicable for 13.75 points in Category I.B – Education of the CFRE International application for initial certification and/or recertification.

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Attend as a team – remember, if you register as a group, every 4th registrant is free.  
Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you.  
**Register online at [www.academicimpressions.com](http://www.academicimpressions.com)**

## REGISTRATION FEES

Your registration fee includes: full access to all conference sessions and materials, access to the networking reception on Thursday, breakfast and lunch on Friday, and breakfast on Saturday, as well as refreshments and snacks throughout the conference.

Postmarked on or before March 5, 2010

Mastering the Major Gift Process \_\_\_\_\_ \$1095 USD  
(For registrations postmarked after March 5, 2010, an additional \$100 fee per registrant applies)

Check here if you have any dietary or accessibility needs. Please list any needs in the space below and we will do our best to accommodate you.

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) \_\_\_\_\_

## CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name \_\_\_\_\_ Name Preferred for Badge \_\_\_\_\_  
Job Title \_\_\_\_\_ Institution/Organization \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_

(For registration confirmations and pre-conference communication. FOR ADDITIONAL REGISTRANTS PLEASE COMPLETE ADDITIONAL FORMS.)

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_  
Additional Contact Name \_\_\_\_\_ Additional Contact Phone \_\_\_\_\_  
Additional Contact Title \_\_\_\_\_ Additional Contact Email \_\_\_\_\_  
Emergency Contact Name \_\_\_\_\_ Emergency Contact Phone \_\_\_\_\_  
(In case of emergency, we will contact this person on your behalf)

## SIGN UP FOR FREE HIGHER ED NEWS & ANALYSIS

Academic Impressions is happy to offer free higher education daily news updates and weekly analysis, delivered in an easy-to-scan email.

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- Specific takeaways: how the news may impact your institution

Sign me up for **Daily Impact**

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## PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.741.0849 or mail form along with payment to: Academic Impressions, 4643 S. Ulster St. Ste. 350, Denver, CO 80237.

### CREDIT CARD

Please charge my credit card: (Visa, MC, AmEx)  
Name on Card \_\_\_\_\_  
Account Number \_\_\_\_\_  
Exp. Date \_\_\_\_\_  
Billing Zip Code/Postal Code \_\_\_\_\_  
Security Code (last 3 digits on the back of Visa and MC or  
4 digits on front of AmEx) \_\_\_\_\_

### CHECK/INVOICE

My check is included and covers \_\_\_\_\_ registration(s)  
Check # \_\_\_\_\_  
 Please invoice me  
Purchase Order # \_\_\_\_\_  
(PO# not required to receive invoice)

## REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by December 18, 2009. A \$100 processing fee will be assessed. After December 18, 2009 a credit (less \$100 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, web conferences, audio proceedings, or web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.