



CONFERENCE

INTEGRATED STRATEGY FOR ANNUAL GIVING

February 1 - 3, 2017

Orange County, CA





Perform a complete audit of your annual giving program and solicitation tools.

OVERVIEW

Go beyond the basics of annual giving to comprehensively assess your annual giving program and develop actionable strategies that will help you grow your program for long-term success. This three day conference will walk you through traditional approaches to annual giving as well as emerging trends to better equip you to evaluate your program and ensure you are equipped to meet the varied challenges you face in establishing an annual giving program that is positioned to thrive in today's competitive philanthropic landscape.

Day one explores the complex and evolving landscape of annual giving and helps you define answers to key questions every program is facing. What does modern annual giving look like? Where is your program now versus where you would like it to be? What are the current challenges we face as well as emerging opportunities? How can you strategically position your program for long-term success?

Day two focuses on exploring the full gamut of solicitation tools available for today's modern annual giving programs. We will assess what is working, what new opportunities are emerging and provide time to create actionable goals for participants to take away for each area discussed.

Day three begins with a presentation on how to effectively steward annual donors with a focus on increasing donor retention. The capstone sessions will help participants incorporate their learning from the event to develop preliminary strategies to take back to your shop for immediate implementation.

COMPREHENSIVELY AUDIT YOUR SOLICITATION TOOLS

This event offers a unique opportunity to take a comprehensive look at all of your solicitation tools. You will leave with a clear idea of which solicitations are working, which you can fine-tune, and which need to be re-worked. This audit will help you prioritize your efforts when you return to campus.

PRE-CONFERENCE WORKSHOP: FRONT-LINE FUNDRAISING FOR LEADERSHIP ANNUAL GIVING

Annual giving programs are increasingly seeing a reliance on relationship-based fundraising. Learn the skills you need to ramp up your front-line effort.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/integrated-strategy-annual-giving-february-2017



WHO SHOULD ATTEND

This event is ideal for annual giving managers, directors, and their team members who want to learn how to more efficiently target giving populations. This conference assumes a general level of annual giving knowledge and is not recommended for newcomers to fundraising.

LEARNING OUTCOME

After participating in this conference, you will be able to create a more effective and strategic plan for your annual giving program.

CONTACT US FOR MORE INFORMATION

Contact Gwen Doyle, Program Manager at gwen@academicimpressions.com or 720-988-1258 if you'd like additional information about the program.



AGENDA

WEDNESDAY, FEBRUARY 1, 2017

Pre-Conference Workshop: Front-Line Fundraising for Leadership Annual Giving

8:30 - 9:00 a.m.

Continental breakfast for pre-conference workshop attendees (included in workshop registration fee)

9:00 - 11:45 a.m.

Pre-Conference Workshop: Front-Line Fundraising for Leadership Annual Giving

Annual giving programs are seeing a greater reliance on relationship-based fundraising. This workshop will teach you the front-line skills necessary to ramp up your front-line effort, including:

- Planning calls based on prospect data, anchor appointments, and budget pressures
- Tips for securing an initial appointment, including moving through gatekeepers
- How to use the cultivation process to naturally build to the ask
- The pros and cons of using a proposal or white paper during your solicitation process
- Creating a conducive environment for a successful ask
- Role-playing difficult scenarios

11:45 a.m. - 12:30 p.m.

Lunch for pre-conference workshop attendees (included in workshop registration fee)

Day One: The Landscape of Annual Giving

12:00 - 12:30 p.m.

Conference registration

12:30 - 1:00 p.m.

Welcome and Opening Remarks

1:00 - 2:00 p.m.

Landscape of Annual Giving: What Does Annual Giving Look Like Now?

Setting the stage for the conference, this session will provide context for the annual giving landscape as it stands currently, including data from 2014 giving trends and donor behavior.

2:00 - 3:15 p.m.

Program Assessment: Where Is My Program Now?

In small groups, you will identify specific strengths, weaknesses, opportunities, and threats associated with your annual giving efforts to prepare you for creating a strategy that takes into account your institution's unique culture.

3:15 - 3:30 p.m.

Break

3:30 - 4:15 p.m.

Generational Values Activity: To Whom Are We Talking?

To understand how to communicate with your donors, you must understand how their values differ across time. In this session you will participate in an activity that will demonstrate the living generations' values and will conclude with how messaging should adapt based on their unique values.



AGENDA

WEDNESDAY, FEBRUARY 1, 2017 (CONTINUED)

4:15 - 5:15 p.m.

Data Driven Strategy: How Do We Get There?

To have a strong annual giving program, you must be able to strategically analyze your data to continue to increase funds raised in the current fundraising climate. With your SWOT results in hand, you will learn basic data analysis techniques for essential reporting, segmenting, and tactical decision making. You will also discuss the key metrics and benchmarking figures for your program as well as for various solicitation tools.

5:15 - 6:15 p.m.

Networking reception (included in registration fee)

THURSDAY, FEBRUARY 2, 2017

Day Two: Assessing and Improving Your Solicitation Tools

8:00 - 8:30 a.m.

Continental breakfast (included in registration fee)

8:30 - 9:00 a.m.

Working Session: Solicitation Tool Audit

In this working session you will perform a comprehensive audit on all of your solicitation tools, scoring on effectiveness by segment. This activity will lay the groundwork for the rest of the day's discussion on solicitation vehicles.

9:00 - 10:15 a.m.

Direct Mail

Direct mail continues to be a staple for most annual giving programs; however, the execution of direct mail strategies can vary greatly. This session will highlight elements of effective mail pieces and demonstrate how to tailor them to your population segments.

10:15 - 10:30 a.m.

Break

10:30 - 11:45 a.m.

Digital Solicitations and Social Media

The need to take your solicitations digital is known, but are you taking full advantage of your web, email, and social media platforms? In this session, we will demonstrate what success looks like in each of these mediums and how to ensure complementary messaging across all three. We will also discuss how to optimize each platform by segment.

11:45 a.m. - 12:45 p.m.

Lunch (included in registration fee)

12:45 - 1:45 p.m.

Innovations in Annual Giving: Crowdfunding, Days of Giving, and Micro-Campaigns

Chances are that you are aware of these latest trends in annual giving and have, perhaps, even tried one or more at your institution. This session will cover best practices of innovations including: crowdfunding, days of giving, and micro-campaigns and how to best integrate them into your overall strategy.



AGENDA

THURSDAY, FEBRUARY 2, 2017 (CONTINUED)

1:45 - 3:00 p.m.

Phone Programs

Are you properly leveraging your phonathon in your annual giving effort? Are your calls planned in tandem with solicitation schedules, and are your scripts adjusted accordingly and by segment? In this session you will learn how to leverage your calling program so that you are making the most of your efforts, especially as contact rates continue to decline.

3:00 - 3:15 p.m.

Break

3:15 - 4:15 p.m.

Personal Solicitations

Annual giving is increasingly showing a greater reliance on frontline and relationship-based fundraising, particularly for leadership annual donors. This session will cover how to best segment and identify donors who should receive a personal solicitation and how to maximize those visits.

4:15 - 4:30 p.m.

Day two closing and Q&A

FRIDAY, FEBRUARY 3, 2017

Day Three: Stewardship and Developing Your Plan

8:00 - 8:30 a.m.

Continental breakfast (included in registration fee)

8:30 - 9:30 a.m.

Annual Giving Stewardship

Stewarding annual fund donors is notoriously difficult but vital for retention of this population. This session will show you how to use existing resources and opportunities to maximize your time, budget, and stewardship efforts.

9:30 - 9:45 a.m.

Break

9:45 - 10:15 a.m.

Working Session: Integrated Strategy

With a thorough audit of each of your solicitation tools and an understanding of how to best integrate all of your solicitation options, you will now have time to put together your preliminary strategy to take action once returning to campus.

10:15 - 11:15 a.m.

Tying It All Together and Deploying Your Plan

Having a strategy for the next year is vital to your annual giving success, but equally important is the know-how to complete that plan with strong internal support. In this session, you will learn what systems you need to ensure your plan is executed and what techniques you can use to make mid-course revisions.

11:15 - 11:45 a.m.

Final Wrap-up, Faculty Q&A Panel, and Program Evaluation



INSTRUCTORS

Brian Daugherty, Senior Vice President & Chief Philanthropy Officer, San Diego Humane Society

With more than twenty years of experience in development with a focus on annual giving and major gifts, Brian has worked for a variety of organizations in the nonprofit arena, including the Baltimore Symphony Orchestra, the Maryland Zoo in Baltimore, the University of Baltimore, the University of California, San Diego San Diego State University and the University of San Diego. His experience includes extensive work on telemarketing campaigns, direct mail, board management, volunteer solicitations, e-philanthropy, and personal solicitations. Brian has used his extensive experience in statistical data analysis and strategic planning to be an integral team member of capital campaigns ranging in scope from \$16 million to \$1 billion. A contributor to Currents magazine, he has been a frequent presenter for the Council for Advancement and Support of Education (CASE) and the Annual Giving Professionals Network (AGPN).

Molly Robbins, Executive Director of the Saint Joseph's Fund, St Joseph's University

Molly oversees the design and execution of a comprehensive annual giving strategy. She has over a decade of experience working with leadership giving programs, Telefund, volunteer programs, direct marketing, social media, and events. In addition to her work in the office, she also launched the Philadelphia Annual Giving Workshop Series through a CASE Venture Capital Grant. She holds a Masters in Organizational Leadership and Development from Saint Joseph's University and a Bachelors in Political Science from the University of Pittsburgh.

Melissa Rowan, Executive Director of Annual and Special Giving, Iowa State University Foundation

Melissa oversees an annual giving operation that raises more than \$5 million on an annual basis. She also serves as the development liaison for Reiman Gardens, the University's botanical gardens; the Iowa State Center, the university's performing arts center; and the university's honors program.

Additionally, she staffs Iowa State's nationally recognized women and philanthropy program. Melissa also works as a consultant for Campbell & Co., Melissa provides annual giving and membership council for higher education, service based, and cultural institutions. In this role, she seeks to help the programs she is working with enhance their fundraising capabilities with traditional annual giving strategies and cutting edge ideas. Melissa has participated as a conference chair and faculty member at several CASE (Council for the Advancement and Support of Education) and other higher education annual giving conferences in addition to speaking at national conferences for organizations such as the League of American Orchestras and Volunteers of America.

Melissa graduated from Iowa State University with a bachelor's degree in history and Florida State University with a master's degree in public administration with an emphasis in nonprofit management.



OTHERS	VS	ACADEMIC IMPRESSIONS
Typically large annual event		Intimate, workshop-style event with personalized attention
Many concurrent sessions; forcing choice		One focused learning track
Uneven sessions and less outcome-focused, driven by an open call for proposals		Needs-driven and meticulously planned with practical outcomes <ul style="list-style-type: none"> Action plans and next steps to use upon returning to campus Carefully-vetted expert instructors that are also practitioners in the field
Lecture-based		Learner-centric and designed for interaction and collaboration
Large networking events with vendors		Small-scale opportunity to truly connect with colleagues in the same position at other institutions
Some slide presentations posted online after the event		200+ page workbooks with references, worksheets, articles, templates, exercises, and planning documents

96%
of past attendees would recommend an AI conference to a colleague

250+
and growing of AI member institutions (AI Pro)

15,000+
higher ed professionals served

AI Conference Experiences

Academic Impressions provides valuable exploration of timely and pragmatic challenges to higher education institutions. The combination of impassioned subject matter experts as presenters and means of engaging conference attendees was potent.

- C. Tennent, Associate VP of Facilities Management, University of Saskatchewan

This conference was the complete package: relevant topics, philosophical and practical applications, fantastic speakers, fantastic location. One of the BEST conferences I've ever attended. It is what a conference should be! Full of collaboration, networking and solutions.

- M. Lowe, Associate Professor and General Reference Librarian University of Louisiana at Monroe



LOCATION

February 1 - 3, 2017 :: Orange County, CA

HOTEL:

Hyatt Regency Orange County
11999 Harbor Blvd.
Garden Grove, CA 92840

To reserve your room, please call 714-750-1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$129 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of January 31, February 1 and 2, 2017.

RATE AVAILABLE UNTIL:

Make your reservations prior to January 10, 2017. There are a limited number of rooms available at the conference rate. Please make your reservations early. Rooms are subject to hotel availability.

ADDITIONAL INFORMATION:

Conveniently located in Anaheim, this hotel is a spectacular resort destination for families, business travelers, and vacationers alike. It's just a short drive away from Orange County beaches, shopping outlets and attractions.

John Wayne/Orange County Airport (SNA)

18601 Airport Way
Santa Ana, CA 92707
Distance: 13 miles

Super Shuttle: \$11 per person/one way

Los Angeles International Airport (LAX)

380 World Way
Los Angeles, CA 90045
Distance: 35 miles

Super Shuttle: \$17 per person/one way



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING (CIRCLE ONE)

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

Bring your team!

For every two people you register from your institution, receive a third registration at 50% off of the registration price.

BEST VALUE	CONFERENCE	WORKSHOP	WITH AI PRO MEMBERSHIP
Conference + Pre-Conference Workshop	Conference only	Pre-Conference Workshop only	Get \$100 OFF With Qualifying AI Pro Memberships Learn More
\$1,595	\$1,295	\$395	\$100 OFF

EARLY BIRD PRICING

Postmarked on or before January 13, 2017. For registrations postmarked after January 13, 2017., an additional \$100 fee per registrant applies.

[REGISTER ONLINE](#) or on the next page.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

CONFERENCE REGISTRATION INFORMATION

Print Name | Job Title

Institution/Organization

What name do you prefer on your name badge? | Address

City | State/Province | Zip/Postal Code | Country

Telephone | Email

IF THIS CONFERENCE PARTICIPANT HAS ANY DIETARY OR ACCESSIBILITY NEEDS, PLEASE LIST THEM IN THE SPACE BELOW. WE WILL DO OUR BEST TO ACCOMMODATE THESE NEEDS.

[Empty space for dietary or accessibility needs]

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

ADDITIONAL CONTACT INFORMATION

If you would like us to send a copy of your registration confirmation or receipt to someone else, please complete this section

Additional Contact Name | Contact Phone

Additional Contact Email | Additional Contact Title

EMERGENCY CONTACT INFORMATION

Emergency Contact Name | Emergency Contact Phone



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PAYMENT METHOD

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237

CREDIT CARD



Name on Card

Account Number

Billing Address

Billing City

Billing State

Billing Zip Code/Postal Code

Exp. Date

Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)

AMOUNT TO CHARGE: _____

CHECK/INVOICE

My check is included and covers _____ registration(s) Check # _____

Please invoice me, Purchase Order # _____ (PO # not required to receive invoice)

HIGHER ED IMPACT

Delivered free to your inbox, Higher Ed Impact provides you with a full tool kit to help you monitor and assess the trends and strategic challenges likely to have an impact on your institution's health and competitiveness. (Check the boxes for the editions you would like to sign up for)

DAILY PULSE - Scan current events, timely research, and notable practices at other institutions.

WEEKLY SCAN - Review the week's most significant events and the most timely research in higher education, with key takeaways suggested by higher education's leading experts.

DIAGNOSTIC - Get an enterprise-wide and in-depth look at a current, strategic challenge; identify steps to take and critical questions to address.

List the names of the registrants you'd like to sign up: _____

Learn more or sign up to receive Higher Ed Impact at: www.academicimpressions.com/news-sign-up

**Note if you do not provide any names in the above space, all attendees will be signed up for the options selected.*



CANCELLATION AND REFUND POLICIES



SATISFACTION PROMISE

We want you to be satisfied with your Academic Impressions learning experience. If the program you purchased fails to meet your expectations, please contact us within 30 days and let us know. We'll credit the full amount you paid toward another AI program that may better fit your needs.

CONFERENCES

For in-person conferences, substitute registrants are welcome and may be named free of charge at any time. If you cancel 8 weeks or more prior to the first date of the conference, you will receive a full refund, less a \$100.00 service charge per attendee.

If you cancel within 8 weeks of the first date of the conference, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not attend and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions' liability is limited to a refund of the registration fee only.

ONLINE TRAININGS CONSISTING OF AT LEAST ONE LIVE TRAINING DATE

You will receive a full refund (less a \$75 service charge) if you cancel 8 weeks or more prior to the first live training date. If you cancel within 8 weeks of the first live training date, you are not entitled to a refund. But as a courtesy, we will apply your payment (less a \$75 service charge) towards a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish. You may name a substitute primary participant free of charge at any time prior to the first live training date. If available, you may switch the live training format to a self-paced format (such as a CD-ROM Recording or On-Demand Download) free of charge. (Shipping charges will apply to CD-ROM Recording orders outside the U.S. or Canada.)

ONLINE TRAININGS WHICH ARE PURELY SELF-PACED

All sales are final. No cancellations or refunds are provided.

RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS

All sales are final. No cancellations or refunds provided.