



RECURRING GIFTS: STRATEGIES TO GROW YOUR PROGRAM

March 6, 2017 :: 1:00 - 2:30 p.m. EST

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Learn how you can create a giving program that provides a steady source of support for your institution.

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OVERVIEW

Learn key strategies needed to revamp or establish a successful and sustainable recurring gifts program. During this webinar, we will focus on:

- Positioning your recurring gifts program to donors
- Processing recurring gifts and complying with standards
- Collaborating within your shop to grow your program

Whether you have an existing program or are just getting started, this event will give you the skills and ideas you need to run a more successful program.

WHO SHOULD ATTEND

Annual giving, development officers, and advancement services professionals interested in establishing or growing their recurring gifts program. Attendees will leave this webcast with the tools for creating a successful program.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/webcast/recurring-gifts-strategies-grow-your-program



LEARNING OUTCOME

After participating in this online training, you will be able to take a strategic approach to growing your recurring gift program.

CONTACT US FOR MORE INFORMATION

Contact David Boggs, Associate Program Manager David.Boggs@academicimpressions.com or 720-988-1215 if you'd like additional information about the program.

AGENDA

Monday, March 6, 2017 :: 1:00 - 2:30 p.m. EST

➔ **What You Can Expect from a Well-Organized Recurring Gift Program**

- Recurring gifts as an engagement opportunity
- Young alumni and millennial donors
- Building the pipeline

➔ **Positioning Your Program**

- Identifying segments of your audience
- Meeting your audience where they are
 - » Traditional methods: mailers and phone calls
 - » Website: optimizing your online giving form

➔ **Gift Processing and Compliance**

- Evaluating your infrastructure
- Ensuring your process is PCI-DSS compliant
- Maintenance
- Vendor solutions
- Metrics for determining ROI
- Receipting recurring gifts
- Processes for rejection issues/updating card numbers and expiration dates

➔ **Collaboration**

- How the frontline fundraisers and gift processors can work together
- Stewarding recurring gift donors
- Building the pipeline



INSTRUCTORS

Lacie LaRue, Senior Director of Annual Philanthropy, University of Oregon

Lacie LaRue joined the University of Oregon Advancement team as the Senior Director of Annual Philanthropy in September, 2016. With more than 15 years of annual giving experience, LaRue got her start in fundraising as a student caller at Iowa State University. Throughout her career she has developed giving programs with a strong focus on pipeline development, leadership annual giving, segmentation, regional fundraising, face to face solicitations and donor stewardship. In 2016, LaRue was listed as one of the Chronicle of Philanthropy's "Top 40 under 40 non-profit leaders" for her segmentation strategies.

Prior to joining the OSU Foundation, LaRue worked for the annual giving programs at Oregon State University, Iowa State University, the University of Maryland, and Portland State University, overseeing programs that included parent and student giving, pipeline development, direct mail, and phone programs.

LaRue graduated with a Bachelor of Arts in Spanish from Iowa State University in Ames, IA. An active member of CASE for more than 11 years, Lacie has served regional and national conferences in a number of capacities, including as a Faculty Member and Conference Chair.

Kirsten Williams, Director of Gift Services, University of Oregon

Kirsten has been with the University of Oregon Foundation as head of the Gift Services Department for five years. She is responsible for the overall management and development of the Foundation gift processing function, including charitable gifts and pledges, gift receipts, memberships, related documentation and reporting. Prior to that she spent four years at the University of New Mexico Foundation in their Gift Administration Department. In addition to overseeing the day to day operations of gift processing, she implemented Development wide training and helped create policies and procedures for the intranet.



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Postmarked on or before February 27, 2017. After February 27, 2017, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

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