ANNUAL GIVING PLANNING INSTITUTE

April 30 – May 2, 2012
Atlanta, GA

"A must for annual giving officers!"
– Sheila Rawlings, Executive Assistant/Development Coordinator, Point Park University

"This conference was packed full of useful information that I plan to implement this fiscal year. It was very worthwhile."
– Joy Knopp, Director of Annual Giving, SUNY Oswego

"Not only did this conference provide a structured atmosphere to speak and share with other development professionals, but our time was used very wisely!"
– Meagan McMullen, Assistant Director, Annual Trust and Donor Relations, Wentworth Institute of Technology

"I prefer the structure of Academic Impressions conferences because each presentation is a successive step in the process and hands-on working sessions provide opportunity to put what we're learning to work. When we get back to the office, we can begin applying and furthering our work, instead of just bringing back a binder to sit on the shelf."
– Laurel Palmer, Director, Kalamazoo College Fund, Kalamazoo College

ACADEMIC · IMPRESSIONS

OVERVIEW

Is your shop essentially doing the same things year after year? Is your annual giving performance subject to the whims of the economy? Do your staff have all the support they need to impact your annual fund? Do you need a better way to determine how to strategically deploy each of your solicitation tools?

Join us for a hands-on learning event that will help your institution regain its competitive edge by teaching you how to make strategic, data-informed decisions. We'll start with a thorough review of core annual giving strategy principles, then move to more detailed discussion of data analysis and segmentation by population and solicitation tools. You'll leave this event re-energized and prepared to make smarter decisions that will move your shop forward.

Is your shop essentially doing the same things year after year?

WHO SHOULD ATTEND

This event is ideal for annual giving managers and their team members who want to learn how to more efficiently target giving populations through effective strategic planning. Whether you are new to the field or a seasoned pro, this conference will challenge you to think about annual giving in a different way.

DID YOU KNOW?

The registration fee for this conference includes access to our March 22 webcast "Preparing and Mining Data to Inform Annual Giving Strategy." If you register for the conference, your institution will receive a complimentary registration to this webcast. For more information on the included event, please click here.

LEARNING OUTCOME

After participating in this conference, you will be able to more efficiently target your giving populations through strategic planning that leads to more thoughtfully resourced tactics.

AGENDA

THURSDAY, MARCH 22, 2012

1:00 – 2:45 P.M. EDT **_Pre-conference webcast (included with your conference registration): Preparing and Mining Data to Inform Annual Giving Strategy_**

Don't fear the data! This online pre-conference webcast will prepare you to get the most from your conference experience by examining:

- *How to isolate and define data for annual giving*
- *What data you should begin with and how to increase data points based on your shop's achievements*
- *Additional data sets: How to use reunion, college, young alumni, and parent data*
- *How to make your data work by your solicitation tool*

AGENDA

MONDAY, APRIL 30, 2012 (CONTINUED)

12:00 – 12:30 p.m. ***Registration***

12:30 – 1:00 p.m. ***Opening Comments***

1:00 – 2:00 p.m. ***Overview to Annual Giving Planning Strategy***
Proper annual gift planning strategy can lead to fruitful results, even in difficult economic times. In this session, we will discuss the annual giving big picture, offer a map of the planning process, highlight key strategic decision points, and propose suggestions for evaluating success.

2:00 – 3:30 p.m. ***Working Session: Using a SWOT Analysis to Brainstorm and Prioritize Your Efforts***
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. You will then come together as a group to identify common issues and offer initial feedback.

3:30 – 3:45 p.m. ***Afternoon break***

3:45 – 5:00 p.m. ***Strategic Messaging for Annual Giving***
Should your message change with the times? How do you position your institution within the world of nonprofit organizations? What is the best strategy for addressing a wide variety of alums? This session will explore best practices for strategic communication as part of a holistic plan for annual giving.

5:00 – 5:15 p.m. ***Day 1 wrap-up and closing Q&A***

5:30 – 6:30 p.m. ***Networking reception (included in registration)***

TUESDAY, MAY 1, 2012

8:00 – 9:00 a.m. ***Continental breakfast (included in registration) and topical roundtables***

9:00 – 10:00 a.m. ***Building Your Team: Staff Support and Retention***
Annual giving shops are consistently in transition, losing ground and money when your most valued resources — your people — move on. This session will address two pieces of this problem: 1) how to give your staff adequate support so that you can retain them, and 2) how to plan for leadership and staff changes that are somewhat inevitable.

10:00 – 10:45 a.m. ***Data-Driven Program Assessment (Part 1)***
Strong annual giving programs are data-intensive, and you must be able to strategically employ your data to continue to gain ground in our current climate. With your SWOT results in hand, in this session you'll learn basic data analysis techniques for essential reporting and tactical decision making.

10:45 – 11:00 a.m. ***Morning break***

11:00 – 11:45 a.m. ***Data-Driven Program Assessment (Part 2)***
The session will close with a discussion of the key metrics and benchmarking figures for your overall program as well as for various solicitation tools.

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

1:00 – 2:00 p.m. ***Analyzing Your Solicitation Tools***
Depending on your shop, you may be using each of your solicitation tools (phone, mail, online, and personal visitation) to increase engagement, loyalty, unrestricted support, or even pipeline building. But how do you know each one is accomplishing its goal? With your data analysis in hand, you will examine the solicitation tools you call on in your daily work and learn methods to assess and improve their results.

AGENDA

TUESDAY, MAY 1, 2012 (CONTINUED)

2:00 – 3:00 p.m. ***Taking Your Solicitation Tools to the Next Level***
Building on the previous session, this session will provide more in-depth guidance around each of your solicitation tools. You will learn how to apply population level, response rate, and return-on-investment analysis to take your tool deployment to its next evolutionary stage.

3:00 – 3:15 p.m. ***Afternoon break***

3:15 – 4:15 p.m. ***Breakout Groups: Using Your Data to Enhance Your Annual Giving Performance***
In the pre-conference webcast (included with your registration), key data inputs will be defined and you will receive a template to record your annual giving results. During this small-group session, you will work with a faculty member to apply the techniques learned in the previous sessions to see where your annual giving program can be strengthened and how to use your solicitation tools more efficiently.

4:15 – 5:15 p.m. ***Working Session: Solicitation Tool Redesign***
Here you will focus on improving the (re)deployment of your solicitation tools. Working with your colleagues and faculty,you will identify key areas of improvement from your data analysis and determine how your resource allocations may need to be shifted.

5:15 – 5:30 p.m. ***Day 2 wrap-up and closing Q&A***

WEDNESDAY, MAY 2, 2012

8:00 – 8:30 a.m. ***Continental breakfast (included in registration)***

8:30 – 9:45 a.m. ***Budgeting Strategies***
Doing more with the same is the reality for many annual giving directors. You can have a new plan, but how do you actualize that plan if your budget is flat or — more likely — decreasing? In this session, you will learn best practices for:
- *Structuring your budget*
- *Identifying areas where you may be over- or under-spending*
- *Building internal support designed to inhibit further budget cuts*

9:45 – 10:15 a.m. ***Morning break and hotel check-out***

10:15 – 11:15 a.m. ***Deploying Your Strategic 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 the techniques for making mid-course revisions to your plan.

11:15 a.m. – 12:00 p.m. ***Breakout Groups: AG in Context***
Institution and shop size can deeply influence your strategic decisions. During this time, you will:

- *Divide into groups based on those size differentials*
- *Address the implications of your resource availability*
- *Gain insight on size considerations from your faculty and colleagues*

AGENDA

WEDNESDAY, MAY 2, 2012 (CONTINUED)

12:00 – 12:15 p.m. ***Conference wrap-up and closing Q&A***

12:15 – 1:30 p.m. ***Lunch for post-conference workshop attendees***

1:30 – 4:30 p.m. ***Optional post-conference workshop: Long-Term Planning, Building Internal Support, and Measuring Success***

Due to heavy workloads, there is often very little time to establish a long-range annual giving vision. Even the best-laid plans can be derailed by unexpected external changes and alumni pressures. This workshop will help you address some of the pervasive issues impacting annual giving teams across the country, including:

- *Maximizing technology to better communicate with your various constituencies*
- *Developing essential partnerships inside your institution*
- *Creating strategies to educate your current students and young alumni on the impact of philanthropy*
- *Considerations for stewarding donors – both large and small*
- *Maximizing the effectiveness of your annual-to-major gift donor pipeline*

COMPLIMENTARY WEBCAST

The registration fee for this conference includes access to our webcast Preparing and Mining Data to Inform Annual Giving Strategy.

Preparing and Mining Data to Inform Annual Giving Strategy

March 22, 2012 :: 1:00 – 2:45 p.m. EDT

This webcast will help you make the most of the live conference by showing how you can segment your data and isolate key metrics to determine what is working, and what isn't

CFRE Continuing Education Credits
Most Academic Impressions fundraising-related events are applicable for continuing educationcredits toward the CFRE International application for initial certification and/or recertification. This program is currently being considered for approval.

INSTRUCTORS

Conference Chair: Brian Daugherty, Director, Development and Alumni Relations, University of San Diego School of Law
With more than 15 years 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, the Baltimore Zoo, the University of Baltimore, the University of California, San Diego, and San Diego State University. 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 is a frequent presenter for the Council of Advancement and Support of Education (CASE) and the Annual Giving Professionals Network (AGPN).

Heather Greig, Interim Senior Director, Annual Fund, Georgetown University
As the interim senior director for the Georgetown University Annual Fund, Heather leads a team that that engages the university's community of alumni, parents, and friends. She has been with Georgetown since 2004, when she joined the annual fund team as assistant director, managing the phonathon program. Since then, she has contributed to the increasing the performance of key annual fund programs, such as the phonathon, direct mail, and online fundraising. Last year, overall direct marketing results were up 12 percent in dollars and 9 percent in donors. Heather has led cross-functional teams across the university to increase results for important groups such as parents, young alumni, and students. Heather also launched the university's Loyalty Society and accompanying buyback program, which contributed to a six-point lift in alumni retention rates. She has presented on the Loyalty Society at a CASE conference and at the Annual Giving Directors Consortium Annual Conference and has co-presented on data mining at the District II Case Conference.

Janine Kraus, Assistant Vice Chancellor, Annual Giving Programs, Texas Christian University
Janine administers a comprehensive annual giving program, including direct mail appeals, TCU's phone program, gift societies, and other strategic projects. She previously directed undergraduate philanthropy education programming, senior giving, and young alumni solicitation as the institution's director of student and young alumni programs. Before arriving at TCU, Janine spent more than four years in alumni relations at the University of North Texas, where she gained experience in volunteer management, operations, events, and student involvement.

HOTEL RESERVATIONS

The conference will be held at:
Hyatt Regency Atlanta
265 Peachtree St
Atlanta, GA 30303

To reserve your room, call 888.421.1442. Please indicate that you are with the Academic Impressions group to receive the room rate of $159 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of April 29, 30 and May 1, 2012. Reservations must be made by April 9, 2012. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Discover the vibrant attractions nearby the Hyatt Regency Atlanta, many within walking distance. Step right outside the doors for a fascinating look at Atlanta's rich culture and history on world-famous Peachtree Street. Stroll to historic sites, cultural attractions, world-class shopping, and fine dining. Enjoy easy access to top downtown Atlanta attractions, from entertainment to business centers. The hotel is a 15-minute drive to Hartsfield-Jackson Atlanta International Airport, and offers an indoor connection to the Peachtree Center Station of the MARTA public rail system. Plan a sightseeing tour of Atlanta's best attractions from this centrally located hotel near Georgia Aquarium, Peachtree Center Mall, Georgia World Congress Center, AmericasMart, CNN Center, Fox Theater, Atlanta Civic Center, High Museum of Art, Turner Field, and Philips Arena.

Attend as a team – remember, if you register as a group, every fourth 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**

REGISTRATION FEES

Registration fee includes: full access to all conference sessions and materials, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, as well as refreshments and snacks throughout the conference.

Postmarked on or before April 13, 2012

☐ Annual Giving Planning Institute (includes access to March 22 webcast)__________ $1295 USD

☐ Annual Giving Planning Institute conference plus post-conference workshop__________ $1595 USD

(For registrations postmarked after April 13, 2012, 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 ______

Telephone __________ Fax __________ Email __________

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

Additional Contact Name __________ Additional Contact Phone __________

Additional Contact Title __________ Additional Contact Email __________

Emergency Contact Name __________ Emergency Contact Phone (day)__________

FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

☐ **Sign me up for *HEI: Daily Pulse*** – impactful news, trends, and practices, sent daily

☐ **Sign me up for *HEI: Weekly Scan*** – the week's most critical news, with analysis of top stories and trends, sent on Fridays

☐ **Sign me up for *HEI: Monthly Diagnostic*** – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

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 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, 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 February 3, 2012. A $100 processing fee will be assessed. After February 3, 2012 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.