



CONFERENCE

ALUMNI BOARDS: STRENGTHENING STRATEGY AND GROWING ENGAGEMENT

June 5 - 7, 2017
San Diego, CA





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Develop your alumni board in a way that allows you to accomplish strategic objectives and goals.

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OVERVIEW

Learn how you can increase the effectiveness of your alumni board and its members' involvement. Representing alumni relations, annual giving, and academic perspectives, our expert instructors will share practical tips and advice on how you can create a more effective board, including:

- Defining your board's purpose, roles, and strategy
- Recruiting and onboarding board members and leaders
- Increasing the effectiveness of your meetings
- Identifying and solving communication issues
- Assessing your board's effectiveness with established metrics

POST-CONFERENCE WORKSHOP: DEVELOPING A YOUNG ALUMNI BOARD

Engaging young alumni with a board or council can be an effective way to build on their desire to remain connected to their alma mater. In this workshop, you will walk through planning for and working with your alumni board to better engage your newest alumni.

BRING YOUR BOARD MEMBERS WITH YOU

This conference is carefully designed for institutional representatives charged with increasing board effectiveness, as well as alumni board members. You are highly encouraged to bring teams comprised of both constituents. **When you register two people, a third can attend for 50% off the registration price.**

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/alumni-boards-strengthening-strategy-and-growing-engagement



LEARNING OUTCOME

After participating in this conference, you will be able to develop your alumni board to accomplish strategic objectives and goals.

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

MONDAY, JUNE 5, 2017

12:30 - 1:00 p.m.

Registration

1:00 - 1:15 p.m.

Opening comments

1:15 - 2:45 p.m.

Defining Board Purpose and Roles

How do you translate the board's purpose into meaningful responsibilities? Alumni boards are most often advisory and not governing, so what should your board's responsibilities be? What responsibilities should leaders have? How should your board work with institutional staff? This session will walk you through how to clarify the alumni board purpose and roles of board members.

2:45 - 3:00 p.m.

Afternoon break

3:00 - 4:15 p.m.

Working Session: Reviewing and Evaluating Board Structure

Structure should reflect a board's purpose, roles, responsibilities, and process. Unfortunately, committees, policy, and bylaws are often created on an ad hoc basis and/or not updated regularly. During this session, the faculty will discuss how to create or revise your structure to make it reflective of your mission and will address how to most effectively implement your structure.

4:15 - 5:45 p.m.

Role of the Board in Fundraising Efforts

What is the role of the alumni board in institutional advancement? In this session, faculty will identify different fundraising models and describe the relationship of the board with the development office. The faculty will also outline the role of the alumni board during a campaign.

5:45 - 6:45 p.m.

Networking reception (included in registration fee)



AGENDA

TUESDAY, JUNE 6, 2017

8:30 - 9:00 a.m.

Continental breakfast (included in registration fee)

9:00 - 10:15 a.m.

Setting Board Strategy

With your board purpose set, and member responsibilities defined, the next step is to begin developing your strategy. This session will address how to cooperatively define long- and short-term strategy, and then how to ensure board buy-in from that strategy. We will then discuss how to move from strategy to implementation, and how best to assign responsibility for tactical issues, including committee charters and policies and procedures that are outside of the bylaws.

10:15 - 10:30 a.m.

Morning Break

10:30 - 11:30 a.m.

Identifying and Recruiting Board Members

Identifying ideal board members from your pool of alumni leaders requires cooperation from all areas within advancement and the board. This session will focus on best practices for selecting and recruiting productive, dedicated board members, including how to convert board members from other volunteer programs.

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

Lunch (included in registration fee)

12:30 - 1:45 p.m.

Onboarding, Educating, and Training New Members

Bringing new board members up to speed, while integrating them into the existing membership, is essential to managing turnover effectively. This session will walk you through how to onboard and educate new members and provide tips for training them for their roles on the board.

1:45 - 2:30 p.m.

Board Meeting Format and Agenda

There is nothing more frustrating than a board meeting that fails to accomplish its goals. This session will explore different format/agenda options for board meetings and discuss how to apply the best options to your meetings to make them more productive. You will learn how to create agendas that address strategic initiatives and leave board members energized.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 3:45 p.m.

Developing an Intentional Board Culture

A healthy board culture is essential for a board to effectively execute its strategy and accomplish its goals. In this session, we will provide examples of effective board cultures, ways to evaluate your board's current culture, the importance of positive leadership, tone at the top, team building, active engagement, productive discussions, socialization, working through conflict, and continuous culture improvement.

3:45 - 4:00 p.m.

Day 2 Closing and Q&A



AGENDA

WEDNESDAY, JUNE 7, 2017

8:30 - 9:00 a.m.

Continental breakfast (included in registration fee)

9:00 - 10:15 a.m.

Developing a Leadership Pipeline and Navigating Your Board through Change

Natural board flux can rapidly shift to uncertainty and inaction without proper leadership. However, being well prepared can allow you to address changes with ease. This session will help you develop that preparation, build a leadership pipeline within your board, and manage your board through inevitable change.

10:15 - 10:30 a.m.

Morning break

10:30 - 11:45 a.m.

Establishing Board Metrics and Assessment

An effective alumni board must identify clear criteria for measuring success across activity—ideally at the mission level, the goal level, and individual level. This session will show you how to formally and informally evaluate your alumni board and its members, including how often to conduct your assessments.

11:45 a.m. - 12:15 p.m.

Faculty Panel, Final Q&A and Closing Comments

POST-CONFERENCE WORKSHOP: DEVELOPING A YOUNG ALUMNI BOARD

12:15 - 1:00 p.m.

Lunch for post-conference attendees (included in registration fee)

1:00 - 4:00 p.m.

Post-Conference Workshop: Developing a Young Alumni Board

Engaging young alumni with a board or council can be an extremely effective way to capitalize on their desire to remain connected to their alma mater. Additionally, these board members can provide valuable insight on their own constituents, who are often difficult to reach and engage. In this workshop, our faculty will guide you through:

- Determining your need for a young alumni board using focus groups and surveys
- Developing a mission and purpose, and identifying resources
- Working with the uniqueness of young alumni volunteers
- Communicating with your board and staying on-trend with new technologies



INSTRUCTORS

Matthew Colson, Executive Director, Alumni Relations, Stony Brook University

Matthew Colson is responsible for the vision, strategy and development of alumni engagement for Stony Brook's more than 175,000 alumni worldwide. He works closely with the deans of thirteen schools and colleges across campus, the Stony Brook Alumni Association Executive Committee, and University Advancement colleagues to develop meaningful student and alumni experiences that will create and sustain lifelong relationships with the university.

Since his arrival in 2012, Matthew created all-new alumni programs that have significantly engaged alumni in the fabric of the university, invigorated Stony Brook's alumni association board, and strengthened the university's alumni network with an aggressive expansion of regional programming and chapter development.

Susan Pyron, Associate Vice President of Annual Giving, Alumni and Parent Relations, Gettysburg College

Susan E. Pyron has direct responsibility for the alumni association's board of directors and oversight of the annual giving, athletic giving, alumni relations, and parent relations offices focusing on constituent engagement and securing current operations support. Previously, Susan was the executive director of the Commission on the Future, a project that engaged nearly 400 alumni, parents, and friends in a year-long study that formed the foundation of Gettysburg College's former \$100M campaign. Gettysburg College is currently in the public phase of a \$150 million comprehensive campaign.

Sandra Richtermeyer, Dean of the Manning School of Business, University of Massachusetts, Lowell

Dr. Richtermeyer's teaching interests are in the areas of corporate governance, accounting information systems, and managerial, governmental, and nonprofit accounting. Her research interests include corporate governance, technology enablement and enterprise systems, nonprofit accounting, and professional issues for accountants.

Dr. Richtermeyer works actively with a variety of professional organizations and is a frequent speaker for professional development programs on financial leadership, technology integration, organizational governance and performance measurement. She has authored many articles in academic and practitioner publications. Before joining UMass-Lowell, Dr. Richtermeyer was Associate Dean and Professor of Accountancy at Xavier University, on faculty at the University of Wyoming and the University of Colorado at Denver, and taught while completing her doctoral studies at the University of Colorado at Boulder.

Ashlyn W. Sowell, Senior Director of Development, The Fund For Johns Hopkins Medicine

Ashlyn W. Sowell has enjoyed a career in development for over twenty years. She is the Senior Director of Development for The Fund For Johns Hopkins Medicine. Ashlyn's first position was as Director of Development for The Children's House at Johns Hopkins and The Grant-A-Wish Foundation (now known as Believe in Tomorrow). From there she moved to her alma mater, Duke University, serving as Annual Fund Director at The Fuqua School of Business and a Major Gift Officer at the Medical Center, during Duke's \$2 billion campaign. In 2006, Ashlyn joined the development staff at Gettysburg College where she held several key positions. As Associate Vice President for Development & Campaign Director, Ashlyn led the planning, leadership and public phases of Gettysburg's \$150 million campaign, working closely with the president and board of trustees. Her move back to Johns Hopkins in 2015 took her career full circle back to working in health care with grateful patients. She is an active speaker and writer in the field and loves to mentor newcomers to development.

Erin E. Stringer, Director of Alumni and Parent Relations, Catawba College

Erin currently serves as the Director of Alumni and Parent Relations for her alma mater, Catawba College in Salisbury, NC. Previously, Erin was the lead staff liaison to the 'Burgians Of the Last Decade (BOLD) Council at Gettysburg College. There she implemented plans to establish and manage a volunteer board of young alumni in order to create meaningful connections between the College and its most recent graduates. In addition to working with the young alumni board, she also worked on initiatives that served the Gettysburg College's entire young alumni population. Prior to career in Higher Education, Erin worked on Capitol Hill as a press aide and a clerk in the House of Representatives.



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

June 5 - 7, 2017 :: San Diego, CA

HOTEL:

Hyatt Regency Mission Bay Spa and Marina
1441 Quivira Rd
San Diego, CA 92109

To reserve your room, please call 619-224-1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$189 for single or double occupancy, plus a resort fee.

ROOM BLOCK DATES:

A room block has been reserved for the nights of June 4, 5, and 6, 2017.

RATE AVAILABLE UNTIL:

Make your reservations prior to May 12, 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:

Hyatt Regency Mission Bay Spa & Marina promises incredible amenities, easy access to San Diego attractions, and impeccable service from a welcoming staff. Luxuriate in the eco-friendly, full-service spa, take a water taxi to SeaWorld San Diego, plan a day of sportfishing, stroll on the beach, or relax in a deck chair at the award-winning hotel pool and watch the boats in the marina. You'll find the best of California coastal chic at this luxury hotel in San Diego.

TRANSPORTATION:

San Diego International Airport (SAN) is located approximately six miles from the Hyatt Regency Mission Bay Spa & Marina hotel.

Shuttle: Fare is approximately \$12, per person, one-way. Advanced reservations are required. Visit SuperShuttle's website or call 800-258-3826 to make your reservation.

Uber / Lyft: Fare is approximately \$15 one-way. Rates will vary. Please visit the Hyatt's transportation page for additional information.



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 Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, 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 + Post-Conference Workshop	Conference only	Post-Conference Workshop only	Get \$100 OFF With Qualifying AI Pro Memberships
\$1,595	\$1,295	\$395	Learn More
			\$100 OFF

EARLY BIRD PRICING

Postmarked on or before May 19, 2017. For registrations postmarked after May 19, 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.