



CONFERENCE

TRANSFORMATIONAL GIFTS: ATTAINING THE GIFT OF A LIFETIME

June 26 - 27, 2017

Boston, MA





Develop a cultivation plan for transformational gift donors.

OVERVIEW

Learn strategies for cultivating and soliciting one of your top donors in a way that can alter the future of your institution. Understanding what motivates and compels donors to make a transformational gift is a key aspect that is missing at many shops. This training will focus on showing you how to:

- Inspire donors to make a transformational gift
- Develop a successful proposal
- Cultivate and solicit donors with transformational capacity
- Implement a stewardship plan for transformational donors

Included with your registration is a workbook with action-planning worksheets and stewardship tools that will be invaluable as you develop your transformational gift strategy.

POST-CONFERENCE WORKSHOP: STRATEGIC STEWARDSHIP PLANS FOR TOP PROSPECTS

Strategic stewardship is critical before, during, and after a transformational gift has been made. It will further the vision of a donor's transformational gift, naturally leading to the next gift. In this post-conference workshop, you will design strategic stewardship plans for your top transformational gift prospects to ensure comprehensive engagement throughout the relationship.

COME WITH A DONOR IN MIND

This conference will be most valuable if you have a specific donor in mind whom you wish to cultivate, solicit, and steward. Vice presidents of advancement; directors of development; principal, major and planned gift officers; and stewardship/donor relations professionals will leave with a comprehensive strategy for your institution.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/transformational-gifts-attaining-gift-lifetime



LEARNING OUTCOME

After participating in this conference, you will be able to better cultivate transformational gifts.

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

DAY ONE: MONDAY, JUNE 26, 2017

8:00 - 8:30 a.m.

Registration and Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Opening Comments and Introductions

9:00 - 10:15 a.m.

The Transformational Donor Cycle

In this opening lecture, our expert faculty will share their experiences in cultivating, soliciting, securing, and stewarding a transformational gift. Through these insights, you will gain a deeper understanding of the transformational donor cycle and the strategies associated in the process.

10:15 - 10:30 a.m.

Morning Break

10:30 - 11:45 a.m.

Building and Aligning the Vision

A transformational vision is one that combines a donor's passion and ability with an institution's mission and opportunity. This vision is complex and highly personalized, and is a process that promotes collaboration from the start.

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

Lunch (included in registration fee)

12:45 - 2:00 p.m.

Top Tier Cultivation and Solicitation

The cultivation and solicitation process requires strategy different than that of the more common major gifts. Our expert instructor will guide you as they outline the components to top-tier cultivation and solicitation.

2:00 - 2:15 p.m.

Afternoon Break

2:15 - 3:15 p.m.

Developing a Cultivation Strategy - Working Session

Building on the fundamentals presented in the last session, you will apply top tier cultivation and solicitation concepts by assessing your current donors, visions, and partnerships. With the support of your colleagues, peers, and faculty, you will identify the best strategy and timeline to guide your donor forward.

3:15 - 4:00 p.m.

Internal Partnerships

Many internal partnerships must be utilized in order to execute a successful transformational gift proposal and avoid conflict or insufficient follow-up. Additionally, each partner must have clearly defined roles throughout each stage of the process. This workshop will outline the roles of university leadership, development, and academic administration, so that you can leave this session equipped with the tools to uncover a transformational vision for your institution.

4:00 - 4:30 p.m.

Day One Wrap-up, Q&A

4:30 - 5:30 p.m.

Networking Reception (included in registration fee)



AGENDA

DAY TWO: TUESDAY, JUNE 27, 2017

8:00 - 8:30 a.m.

Breakfast (included in registration fee)

8:30 - 10:00 a.m.

Developing the Proposal

Transformational gift proposals take craft, precision, and significant detail to demonstrate the future return on investment. This session will detail the expectations of high level wealth donors and the critical components of successful proposals.

10:00 - 10:15 a.m.

Morning Break

10:15 - 11:30 a.m.

Donor Relations for Top Tier Donors

In this concluding session, our expert instructor will outline the style and level of stewardship that is most effective with transformational gift donors. You will leave this session with an understanding of how this level of stewardship is not only critical for securing a transformational gift but how it will also aid in the cultivation of the next gift.

11:30 a.m. - 12:00 p.m.

Debrief Discussion: Next Steps, Q&A

The closing session of this program will be a debrief discussion, allowing you to articulate your next steps upon returning to campus. Our expert speakers will be available to answer additional questions during this time.

POST-CONFERENCE WORKSHOP: STRATEGIC STEWARDSHIP PLANS FOR TOP PROSPECTS

12:00 - 1:00 p.m.

Lunch for Post-Conference Workshop Attendees (included in workshop registration fee)

1:00 - 4:00 p.m.

Post-Conference Workshop: Strategic Stewardship Plans for Top Prospects

Strategic support and transformational stewardship must be planned with an overall vision and goal in mind. In this post-conference workshop, you will better understand the donor experience and comprehensive engagement needed for transformational giving as you put together a strategic stewardship plan. After workshopping the plan with peers and our expert speakers, you will leave with a comprehensive engagement strategy unique for your donor and institution.



INSTRUCTORS

Senior Vice President for Advancement; Executive Director of the Stony Brook Foundation, Stony Brook University

Dexter A. Bailey Jr. is a fundraising executive with over 25 years of experience building successful programs at both public and private universities including Worcester Polytechnic Institute, UC Berkeley, University of Washington, Ohio University, and now at Stony Brook University. During his career, he has been directly involved in raising over \$700 million. He is also the executive director of the Stony Brook Foundation, a private 501(c) (3) with \$500 million in total assets.

His expertise includes reengineering comprehensive fundraising programs, complex principal gift strategy development, alumni relations, staffing development and comprehensive campaign implementation. Dexter is often invited to speak around the country on issues related to leadership in advancement, principal gifts strategies and the role and experience of minorities in university advancement.

As senior vice president of advancement at Stony Brook University, his fundraising responsibilities encompass Stony Brook University, Stony Brook University Hospital, Stony Brook Children's Hospital and the campuses in Southampton, New York; Turkana Basin Institute, Kenya; SUNY Korea; and Centre ValBio, Madagascar.

Since Dexter arrived in 2011, Stony Brook has launched a \$600 million campaign that is unprecedented in the State University of New York (SUNY) system. To date, the campaign has generated more than \$468 million, including a historic \$150 million lead commitment. In 2014, the Council for Advancement and Support of Education recognized Stony Brook's fundraising program for "Overall Performance" and "Overall Improvement" among peer public research universities.

Dexter earned a BS in journalism from the E.W. Scripps School of Journalism at Ohio University and an MBA from the University of Toledo.

Meg Hendryx, Executive Director of Development and External Affairs, University of Florida, Wertheim College of Engineering

Meg supervises the team responsible for comprehensive activities and management of fund development, as well as marketing and communications for the college. Working alongside the college and university leadership, Meg worked with Dr. and Mrs. Wertheim and the Wertheim Family Foundation to secure the university's largest transformational cash gift of \$50M and establish a \$300M investment pool and campaign for the college, the Wertheim Transformation.

Meg serves as an Executive Committee Board Member of the Engineering Development Forum as well as served as chair of the Nursing Advancement Professionals board. She has spoken routinely at advancement professionals conferences on a range of topics from high level donor engagement, cultivation and major gifts to enhancing and advancing advisory boards. Prior to joining the Herbert Wertheim College of Engineering, she served as Director of Development for the UF College of Nursing and UF Health. Meg's early work includes roles in development for the Jacksonville Symphony Orchestra along with art direction and sales in the publishing industry.

Lynne Wester, Donor Relations Guru

Lynne is a frequent conference speaker and a well-known resource for donor relations and fundraising. She has been featured in The Washington Post, CURRENTS magazine, The Chronicle of Philanthropy and other industry publications. Lynne also created the website and blog www.donorrelationsguru.com where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world and hosts a monthly webinar series.

Using her hands-on approach, Lynne works with many organizations to help them keep their focus donor driven, technology savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan, and holds a master's in strategic fundraising and philanthropy with an emphasis in higher education.



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 26 - 27, 2017 :: Boston, MA

HOTEL:

Hyatt Regency Boston
1 Ave de Lafayette
Boston, MA 02111

To reserve your room, please call 617.912.1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$249 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of June 25 and 26, 2017.

RATE AVAILABLE UNTIL:

Make your reservations prior to June 5, 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:

Located in the heart of downtown, this Boston hotel is the ideal destination for business and leisure travelers alike.

TRANSPORTATION INFORMATION:

Taxi approximately \$25.00 one way from Logan International Airport (BOS).



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING (CIRCLE ONE)

Your registration fee includes: Full access to all conference sessions and materials, breakfast, lunch, and access to the networking reception on Monday, breakfast on Tuesday, 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 your AI Pro Membership Learn More
\$1,595	\$1,295	\$395	\$100 OFF

EARLY BIRD PRICING

Postmarked on or before June 9, 2017. For registrations postmarked after June 9, 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.

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.