

MEASURING AND EVALUATING YOUR ANNUAL GIVING STAFF

July 16, 2012 :: 1:00 – 2:45 p.m. EDT

ACADEMIC · IMPRESSIONS

WEB CONFERENCE



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OVERVIEW

Determining if your annual gift effort is meeting its dollar goal is relatively easy. However, the increasing reach of annual giving responsibilities into specific constituencies and specialized projects only further complicates the difficult task of designing effective staff evaluation criteria.

Join us online to learn how to develop annual giving staff metrics for your institutional setting. You will leave the webcast armed with the tools necessary to design an appropriate solution for both your annual giving generalists and specialists.

LEARNING OUTCOME

After participating in this webcast, you will be better able to choose appropriate metrics to measure the performance of your annual giving professionals.

WHO SHOULD ATTEND

Advancement managers charged with establishing a measurement and evaluation system for their annual giving professionals will leave the webcast better able to use choose appropriate metrics that advance their shop goals.

FREE RESOURCE

Included with the presentation materials to this webcast will be a sample of instructor Rick Dupree's quantitative performance measurement model for annual giving professionals. We encourage you to share it before the webcast with any colleagues attending the program with you.

AGENDA

- Aligning your metrics to your institution's values
- The annual giving staff metrics backdrop at the Kelley School of Business and the University of Richmond
 - Impetus for creation
 - Modification history
- Performance measurements for annual gift generalists
 - Budget management
 - Contacts
 - Dollars
 - Faculty and staff giving
 - Leadership giving
- Performance measurements for annual gift specialists
 - Classes and reunions
 - Faculty and staff giving
 - Leadership giving
 - Mass marketing (direct mail and email)
 - Phone program
 - Special constituencies
- Effectively tracking your metrics system
- Building top-level buy-in for your metrics effort

**Solely
measuring
dollars raised
isn't the
best way to
evaluate your
annual giving
staff.**



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INSTRUCTORS



Richard K. Dupree, Assistant Dean, Development and Alumni Relations, Kelley School of Business, Indiana University

A fundraising executive and consultant, Rick comes to the topic of evaluating alumni relations professionals with a broad background in advancement. Serving as a senior development professional for over 20 years, his expertise in designing metrics to evaluate advancement staff has led him to advise on the subject both domestically and abroad. Prior to his current role, Rick served on the development staff at the University of Evansville and as director of major gifts as well as managing director of capital campaigns for Michigan's Interlochen Center for the Arts.



D. Scott Peters, Director, Annual Giving, University of Richmond

With nearly 20 years of annual giving experience at both large public and small private institutions, Scott currently manages a staff of 14 with an eye toward performance tracking to improve Richmond's fundraising efforts. Starting his advancement career at West Virginia Wesleyan College, he went on to manage successful annual giving programs at Eastern Kentucky University, Pomona College, and, most recently, Valparaiso University. Scott has presented at both regional and national events across the country.

LOGGING IN TO THE WEBCAST

After registration, each registrant will receive a confirmation of payment or an invoice, depending on method of payment. Each registrant will also receive an email with appropriate login information and more information regarding the event a few days prior to the start of the event. The day of the conference, you will receive another email with the same information. To participate, you will need a computer with a high-speed Internet connection. You will have the option to receive audio via your computer speakers or telephone.

WHAT IS A SINGLE SITE CONNECTION?

A site connection allows a single connection to the Web conferencing software and teleconference. We encourage you to set the event up in a conference room or classroom from a single computer in order to allow multiple stakeholders from your campus to participate. Remember, as long as only a single computer connects, you can bring as many people as you want to the event. Because there are no travel expenses and only a single registration fee is required, each additional participant lowers the cost per person significantly. Purchasing a site connection and inviting everyone involved in a particular topic is a great way to provide cost-effective professional development. Please note that you will have the option to receive audio via your computer speakers or telephone.

If for any reason a relevant stakeholder cannot co-locate for the session, we encourage you to include that person by purchasing an additional connection at the reduced fee of \$195 per session. This will ensure that every member of a team receives the same relevant, timely information in the most efficient way. If an interested party cannot participate at the designated time, or if someone would like to view the presentation again, an archived copy of the event will be available for 60 days. If you have any technical or purchasing questions, please contact us at 720.488.6800.

Continuing Legal Education (CLE) Credits

Most Academic Impressions law-related events are applicable for Continuing Legal Education (CLE) credits in the state of Colorado. This program is currently being considered for approval. Credit may be granted by states outside of Colorado, but credit decisions are at the discretion of individual state boards.



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REGISTRATION FORM

Make the most of the presentation: invite your whole team to participate from a single location at no additional cost. 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

Postmarked on or before July 9, 2012

- Single site connection: Measuring and Evaluating Your Annual Giving Staff _____ \$350.00 USD
 Additional site connection _____ \$195.00 USD

(After July 9, 2012, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies)

- Registrants receive a 50% discount on a CD-ROM recording of this session. Please send me the CD-ROM _____ \$175.00 USD
 Can't attend the live session? Please send me a CD-ROM recording of this webcast _____ \$350.00 USD

(For CD-ROM orders outside the United States and Canada, a \$35 international shipping fee will be added.)

Total amount enclosed or to be charged \$ _____

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

WEB CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Job Title _____
Institution/Organization _____ Address _____
City _____ State/Province _____ Zip/Postal Code _____ Country _____
Telephone _____ Fax _____ Email _____

(Additional contact information for registration confirmations and pre-conference communication.)

Additional Contact Name _____ Additional Contact Phone _____
Additional Contact Title _____ Additional Contact Email _____

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.

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REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by May 11, 2012. A \$75 processing fee will be assessed. After May 11, 2012 a credit (less \$75 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.

