

# REACHING YOUNG ALUMNI: KEY BUILDING BLOCKS FOR LIFELONG RELATIONSHIPS

July 30 – August 1, 2012 :: Orlando, FL

**“We are in the beginning stages of really getting our young alumni program going. AI helped me not only with new ideas but to really consider the overall strategic plan and how it fits in with the mission of my university and goals of our entire alumni base.”**

*– Adrienne Hare, Director, Alumni Relations, Western Oregon University*

**“Academic Impressions lives up to its name. The conference is educational, practical, applicable, and leaves an impression that carries back into the workplace for implementation.”**

*– Melissa Small, Director, Alumni Relations, Liberty University*

**“I have attended other young alumni conferences and left feeling as if something were missing. I left this AI event firmly believing I can apply all the ‘building blocks’ that were presented to me. This conference is a must for all development, alumni relations, and career services staff members who deal with young alumni.”**

*– Danielle Werner, St. John’s College, Assistant Director, Alumni Relations*

**“The concrete information that I received from AI’s faculty on student engagement and their transition to active, loyal alumni is something I’m excited to apply to my institution’s culture. These guidelines are made for success – I can’t wait to get started!”**

*– Cassie Young, Coordinator, Student Development and Alumni Programs, Emory Alumni Association*

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## OVERVIEW

Your current young alumni include your future board members, trustees, and major givers. In order to successfully prepare them for a lifelong connection to your institution, you need to maintain the relationship you've been building with them throughout their college years. However, studies have shown that despite growing awareness around student philanthropy, young alumni giving, volunteerism, and engagement remains substantially lower than senior and student giving.

Join your colleagues — and a faculty with proven success — in Orlando to address the major issues involved with working with young alumni, including:

- The student-to-alumni transition
- Event design
- Social media
- Career development
- Volunteer management
- Giving structures

## WHO SHOULD ATTEND

Advancement professionals (especially those in alumni relations and annual giving) will learn how to broaden their reach with their young alumni constituents to help forge more meaningful relationships.

## LEARNING OUTCOME

After participating in this conference, you will be able to broaden your reach with your young alumni constituents to help forge more meaningful relationships.

## AGENDA

MONDAY, JULY 30, 2012

8:00 – 9:00 a.m. **Registration and continental breakfast for pre-conference workshop attendees (breakfast included in workshop registration)**

9:00 a.m. – 12:00 p.m. **Optional pre-conference workshop: Planting Seeds — Student Philanthropy as the First Step to Engaging Young Alumni**

*You have four years to connect with your students before they become young alumni. This workshop will walk you through the college experience year-by-year, explaining where you can cultivate engagement, leadership, and giving at each step along the way. You'll then examine best practices for transitioning your students to young alumni through effective volunteer, activity, and philanthropic techniques. An emphasis will be put on evaluating what you are currently doing with your students, how you are preparing them for their transition post-graduation, and what you can do to develop an initial plan to best cultivate your future young alumni.*

12:00 – 1:00 p.m. **Lunch for pre-conference workshop participants (included in workshop registration)**

12:00 – 1:00 p.m. **Registration for conference participants**

1:00 – 1:15 p.m. **Conference introductions and opening remarks**

1:15 – 2:00 p.m. **Understanding Transition: Ensuring Engaged Students Become Engaged Young Alumni**

*You've worked hard at engaging your students — providing opportunities for them to increase their involvement, educating them about the importance of giving back, and investing in their personal growth. However, if you haven't considered the magnitude of the student-to-alumni transition, you'll most likely lose your most valuable resources — your already-loyal representatives. In this session, you will look at the developmental issues your young alumni face and learn how to weave consistency into your programming in order retain their loyalty.*

**Develop a plan to keep your young alumni connected and giving to your institution.**

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## AGENDA

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MONDAY, JULY 30, 2012 (CONTINUED)

- 2:00 – 2:45 p.m. **Conducting a Gap Analysis for Your Current Programming**  
*What are you doing already to cultivate engagement, giving, and leadership? In this working session, you'll gather in small groups to identify where you're currently offering programming to promote these three building blocks and to see which areas could use some improvement. You'll use this analysis to direct your conference experience and to ensure that your focus is directed to the right areas for your institution.*
- 2:45 – 3:00 p.m. **Afternoon break**
- 3:00 – 4:00 p.m. **Understanding What Your Alumni Want**  
*As you may already know, Millennials are markedly different from past generations. However, this knowledge alone will not tell you what your young alumni want. Here you will be introduced to best practices for conducting research with your institution's young alumni, including focus groups, surveying, and assessing your current programming in order to design future offerings that will be sure to be effective. Time will be left at the end of the session to allow you to start putting together a few questions or topical areas you'd like to address to your own young alumni.*
- 4:00 – 5:00 p.m. **To Build or Not to Build: Young Alumni Councils**  
*Young alumni councils are a great way to engage young alumni, to elicit input, to develop leadership, and to set the tone for giving among young alumni. However, they can be time-consuming, difficult to manage and ineffective. During this session, your faculty walk you through the strategic considerations undertaken at Hamilton in order to decide the question: to build or not to build? Additionally, we will brainstorm ways to build a young alumni council that will meet your strategic goals and discuss giving ownership of the council to young alumni while assuring it is in alignment with your mission.*
- 5:15 – 6:15 p.m. **Networking reception (included in registration)**

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TUESDAY, JULY 31, 2012

- 8:30 – 9:00 a.m. **Continental breakfast (included in registration)**
- 9:00 – 10:15 a.m. **Managing Young Alumni Volunteers**  
*Young alumni often find themselves overwhelmed and over-committed after graduation. While their alma mater may be very important to them, the demands of their lives can quickly take precedence. During this session, we'll focus on how to effectively recruit young alumni volunteers, define clear expectations, develop dependable leaders, and adjust when things just aren't going to plan.*
- 10:15 – 10:30 a.m. **Morning break**
- 10:30 a.m. – 12:00 p.m. **Strategizing Social Media for Young Alumni**  
*Ever more reliably, young alumni are using online social networking and media sharing tools instead of email to communicate. Institutions have been intensifying their online presence as well, but will this really help you connect with your young alumni? Social media is not a silver bullet, but it is a powerful tool when part of a larger communication strategy. In this session, faculty will discuss the most popular networking, media sharing, bookmarking, and micro-blogging tools along with what you can reasonably expect from an online presence. The last part of this session will include hands-on social media work.*
- 12:00 – 1:15 p.m. **Lunch (included in registration)**
- 1:15 – 2:00 p.m. **Career Development Services for Young Alumni**  
*Although young alumni at each institution will vary in what they want, research has proved career services will top their list of desires. We will use this session to explore several ways to meet this need, including: creating effective on-campus partnerships, highlighting successful programs and services, and investigating new models and structures for career development. You will leave this session with ideas and tactics on how to meet the career needs of your young alumni without major resource investment.*

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## AGENDA

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TUESDAY, JULY 31, 2012 (CONTINUED)

2:00 – 2:45 p.m.

### **Creating Events Targeted at Young Alumni**

*How do you move beyond social nights in local bars and invitations to athletic events when you want to engage young alumni? In this session, you'll examine how to design creative events that will attract young alumni. You'll consider different programming options aimed at graduates of the first five years compared to those of the first decade, and examples of successful events for these different life stages. The session will conclude by looking at the relationship these events have to the greater institution and exploring basic ways to measure their effectiveness.*

2:45 – 3:00 p.m.

### **Afternoon Break**

3:00 – 4:00 p.m.

### **Developing Giving Structures for Young Alumni and Discussion Around Restricted vs. Unrestricted Giving**

*Many schools offer senior gift events to introduce their students to giving before they leave, but after they graduate, how do you offer them giving opportunities that are conducive to giving as young alumni? This time will be spent helping you understand the different giving structures you can implement at your institution to better promote young alumni giving. The session will close with a discussion around whether your effort should gravitate toward restricted (as Millennials often want to know exactly where their gifts are going) or unrestricted giving options (to emphasize philanthropy's importance to an institution overall).*

4:00 – 5:00 p.m.

### **Panel: A Discussion with Engaged Young Alumni**

*Even the most well-prepared and well-resourced advancement shop is bound to miss something in its young alumni work. Day 2 will close with a frank discussion featuring a panel discussion of guest young alumni who are engaged with their respective alma maters. Issues around time commitment, communication, events, and broader needs will all be addressed.*

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WEDNESDAY, AUGUST 1, 2012

8:30 – 9:00 a.m.

### **Continental breakfast (included in registration)**

9:00 – 10:00 a.m.

### **Getting Buy-in for New Young Alumni Initiatives**

*Young alumni are the next generation of leaders across all industries and will be a source of support for your institution in years to come, so putting real resources toward engagement, giving, and leadership will pay dividends. However, how do you make a case for long-term return during a time when most shops are focused on short-term gains? This session will help you make the case for a comprehensive young alumni program, build a reasonable budget while you are getting buy-in, and recruit cross-campus allies to your cause.*

10:00 – 10:30 a.m.

### **Final conference break and hotel check-out**

10:30 – 11:45 a.m.

### **Putting it All Together: Planning for Young Alumni Engagement, Leadership, and Giving**

*In this session, you will revisit the core components needed to build a lifelong relationship with your young alumni. Then, using your findings from the gap analysis session, you will create an initial plan for additional programming you want to implement — or changes you'd like to make — at your institution.*

11:45 a.m. – 12:00 p.m.

### **Identifying key takeaways and closing Q&A**

12:00 – 1:15 p.m.

### **Lunch for post-conference workshop attendees (included in workshop registration)**

1:15 – 4:15 p.m.

### **Optional post-conference workshop: Social Media — Making the Case for Resources, Creating a Listening Post, and Measuring Return on Investment/Engagement**

*Some of the toughest challenges with regard to social media involve convincing others that your shop's presence in the virtual world is a necessity, not a luxury. Common road blocks to an increased online presence include lack of resources and difficulties with tracking progress. During this workshop, our faculty will address these issues and guide you through the hands-on experience of building a listening post — a centralized location to aggregate data from Twitter, Facebook, and your other social networking sites. You'll also explore how to measure the return on investment/engagement with basic performance indicators. At the end of the workshop, you'll have identified your next steps toward establishing a more magnetic online presence.*

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## INSTRUCTORS



### **Elise Betz, Executive Director, Alumni Relations, University of Pennsylvania**

Elise began her tenure at Penn as an associate director of The Penn Fund and currently manages a majority of institution's alumni relations efforts, including communications, alumni education, the multicultural alliance, and alumni travel. She also founded and manages "Penn Traditions: Building Our Community," a comprehensive student advancement program. Elise's work in this area helped increase senior gift participation from 18 percent in 2001 to more than 68 percent in 2008 and earned her a 2006 UPenn Model of Excellence Award. She presents at advancement conferences across the country and has consulted with numerous institutions interested in starting student advancement programs.



### **Jon Hysell, Executive Director, Alumni Relations and Annual Giving, Hamilton College**

Jon, a Hamilton graduate, oversees Hamilton's \$6.4 million Annual Fund and Alumni Relations programs that had 35 percent of all alumni participate in events last year. Prior to his tenure as a development officer at Hamilton, Jon spent 24 years as a business executive for Cargill Inc. focusing on sales, marketing, and customer solutions. Hamilton directs a multi-tiered set of GOLD group initiatives that provide a comprehensive approach to engagement built around GOLD-centric events and a class-centered, volunteer-driven system of direct outreach. Since the 2002-03 fiscal year, Hamilton's GOLD group participation rate has averaged 46.1 percent. Hamilton's overall annual fund has had a participation rate of over 50 percent each of the last 31 years, and his near-term goal is to raise GOLD group participation to similar levels.



### **Dave Steadman, Director of Annual Giving, St. Albans School**

Dave began his development career at the dawn of the social media revolution, managing regional alumni events and the senior gift program at Hamilton College, his alma mater. Quickly transitioning to the world of annual giving, Dave made his mark at Hamilton as the director of young alumni giving, crafting and executing an engagement and fundraising strategy for the college's GOLD Group that resulted in a 19.3 percent participation increase over three years. In 2010, he became the director of annual giving for St. Albans, an independent Episcopal day school for boys in Washington, DC. An advocate for responsible social media engagement, Dave has used analytic tools throughout his career to integrate new tools like Facebook and Twitter into broader communication strategies. While at Hamilton, Dave was a presenter and vice chair of the STAFF Conference (Sharing the Annual Fund Fundamentals) and now coordinates monthly meetings for the Independent Education Fundraisers Group in the DC area.

## HOTEL RESERVATIONS

The conference will be held at:  
The Peabody Orlando  
9801 International Drive  
Orlando, FL

To reserve your room, call 1-800-PEABODY or 407-345-4488. Please indicate that you are with the Academic Impressions group to receive the room rate of \$179 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of July 29, 30 & 31. Reservations must be made by July 9, 2012. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Central to Orlando's world-famous theme parks, attractions, and performing and visual arts, The Peabody Orlando is the ultimate address from which to explore the city. The Peabody is five minutes from Universal Orlando Resort and SeaWorld; and 15 minutes from Disney World and downtown Orlando's performing and visual arts featuring the Orlando Ballet, Orlando Opera Company, UCF Shakespeare Festival, and Charles Hosmer Morse Museum of American Art in Winter Park. Exclusive shops and boutiques also abound at The Mall at Millenia, the Florida Mall, and Festival Bay. Pointe Orlando Shopping/Entertainment complex is easily within walking distance of the hotel. Orlando International Airport (MCO) is the closest airport to the hotel. Taxis are plentiful at the airport — you can expect a ride of approximately 15 minutes with cab fare costing around \$35 each way.



### **CFRE Continuing Education Credits**

This conference has been approved for continuing education credits toward the CFRE International application for initial certification and/or recertification.

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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](http://www.academicimpressions.com)**

## REGISTRATION FEES

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. Postmarked on or before July 13, 2012

- Reaching Young Alumni: Key Building Blocks for Lifelong Relationships and both workshops (**BEST VALUE**) \_\_\_\_\_ \$1795 USD
- Reaching Young Alumni: Key Building Blocks for Lifelong Relationships and one workshop \_\_\_\_\_ \$1495 USD
- Pre-conference workshop     Post-conference workshop
- Reaching Young Alumni: Key Building Blocks for Lifelong Relationships \_\_\_\_\_ \$1195 USD  
(For registrations postmarked after July 13, 2012, an additional \$100 fee per registrant applies)
- Pre-conference workshop     Post-conference workshop \_\_\_\_\_ \$395 USD
- 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) \_\_\_\_\_

(In case of emergency, we will contact this person on your behalf) (evening) \_\_\_\_\_

## 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., Suite 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 May 4, 2012. A \$100 processing fee will be assessed. After May 4, 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.