

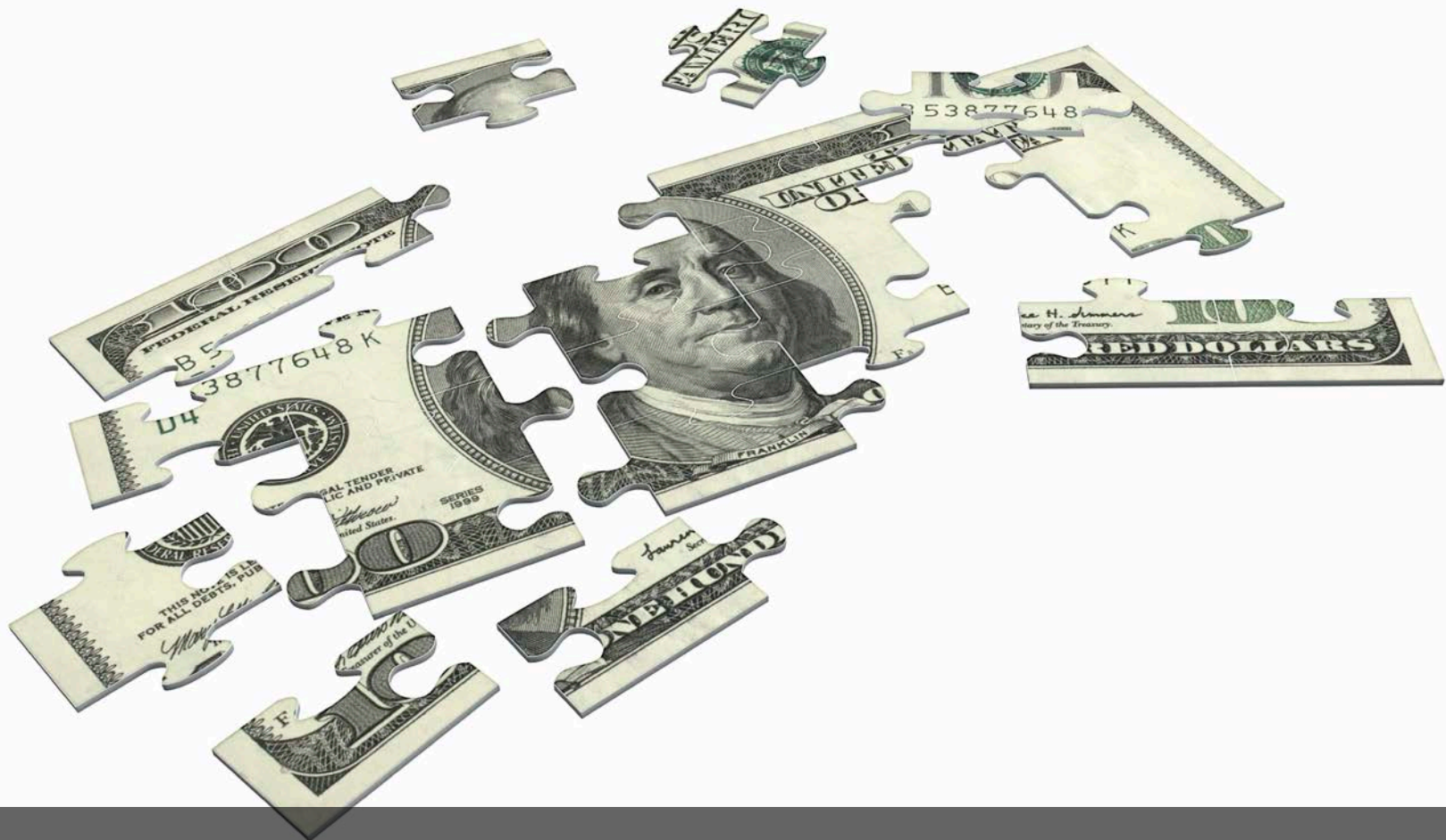


CONFERENCE

FRONT-LINE FUNDRAISING: ESSENTIALS OF GIFT SOLICITATION

July 20 - 21, 2017

Atlanta, GA





More confidently solicit prospects and donors.

OVERVIEW

Learn or refresh the solicitation skills you need to be a successful frontline fundraiser in this highly interactive training program. This program moves beyond theory to give you and your peers the time to role play and practice the skills that you use every day. During the event, you will discuss and practice how to:

- Approach your portfolio with a fresh perspective
- Secure more initial appointments with prospects
- Make donors jump into action with compelling asks
- Move prospects through the donor cycle

Included with your registration is a workbook full of exercises and templates that you can bring back to your shop and practice with your team.

WHO SHOULD ATTEND

New and experienced frontline fundraisers, academic leaders, and fundraising volunteers who want to improve or refresh their solicitation skills will find this training extremely useful. We also recommend this program if you are responsible for training new frontline fundraisers at your institution. Whether you focus on annual giving, major giving, principal giving, or planned giving, you will leave with increased confidence in your calls, asks, and portfolio management skills.

When you register two people from your institution, a third can attend for 50% off!

LEARNING OUTCOME

After participating in this conference, you will be able to confidently solicit prospects and donors.

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.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/front-line-fundraising-essentials-gift-solicitation



AGENDA

DAY 1: THURSDAY, JULY 20, 2017

8:30 - 9:00 a.m.

Conference Registration and Continental Breakfast (included in registration fee)

9:00 - 9:30 a.m.

Opening Comments and Introductions

9:30 - 10:30 a.m.

Preparing for Fundraising Success

This opening session will detail how to best plan your calls and visits through the following tactics:

- Matching a prospect's interests to your institution
- Engaging and involving the prospect
- Determining the proper ask amount, project type, and interest area
- Preparing for the ask with "the five Ws"

You will leave this session prepared to approach your prospect engagement strategies with a fresh perspective.

10:30 - 10:45 a.m.

Morning Break

10:45 a.m. - 12:00 p.m.

Making the Cold Call

The initial outreach you make on the phone will establish the tone for your ongoing interactions with your prospect, making it one of the most crucial points in the philanthropic process. With that knowledge in mind, this session will cover:

- The information you need to make a successful call
- Tips for securing an initial appointment, including moving through assistants
- Phone call scripting

12:00 - 1:00 p.m.

Lunch (included in registration fee)

1:00 - 3:00 p.m.

Making the Cold Call: Interactive Session

After learning the fundamentals of a successful call, you will apply the strategies outlined by role playing calls to donors. You will begin by highlighting what information is needed, potential roadblocks to reaching the prospect, and key points to make in the conversation. You'll role play both live calls and voicemail, and by the end of the session, you will feel more confident in calling each of your prospects.

3:00 - 3:15 p.m.

Afternoon Break



AGENDA

DAY 1: THURSDAY, JULY 20, 2017 (CONTINUED)

3:15 - 4:30 p.m.

Portfolio Management

Once you have mastered the cold call, you will learn how to identify top prospects from a sample portfolio using our expert facilitator's techniques. Just as critical as uncovering your top prospects, you will learn strategies to remove inactive leads from the portfolio to better focus your fundraising time and effort.

4:30 - 5:30 p.m.

Networking Reception (included in registration fee)

DAY 2: FRIDAY, JULY 21, 2017

8:30 - 9:00 a.m.

Continental Breakfast (included in registration fee)

9:00 - 11:45 a.m. (Morning Break 10:30 - 10:45 a.m.)

Making the Ask: Interactive Session

Making a compelling ask and closing a solicitation are often the most daunting and stressful moments in the career of a fundraiser. The ask must be framed in a way that compels your donor to jump into action and support your institution. In this interactive session, you will practice the intricacies of making the ask. You will learn how to:

- Use the cultivation process to naturally build to the ask
- Create a conducive environment for a successful ask
- Script and role-play to move the process forward

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

Lunch (included in registration fee)

12:45 - 2:00 p.m.

Crafting Your Moves Management Strategy

Too often, development officers get stuck in the transitional pieces of the donor cycle—unable to smoothly move prospects through the cultivation, solicitation, and stewardship pieces, and subsequently upgrade donors to the next giving level. In this session, you will assess and develop strategies for your portfolio of donors by focusing on:

- Identifying prospects who need to be upgraded or downgraded
- Tactics for moving donors through each stage of the solicitation cycle
- Considerations for using data to guide strategy

2:00 - 2:15 p.m.

Afternoon Break

2:15 - 3:00 p.m.

Probing Questions for your Moves Management Strategy

Once you have the foundation to create your moves management strategy, we will look at the right questions to ask and when to ask them. Knowing when your donor is ready to move to the next level is key in maintaining your portfolio and gift solicitation strategy, and will go a long way to help you effectively plan your calls and visits.



AGENDA

DAY 2: FRIDAY, JULY 21, 2017 (CONTINUED)

3:00 - 4:00 p.m.

Action Planning

In this final session, you will assess and synthesize the strategies and practices worked on over the previous two days, outlining your key take-aways and new techniques that you will be able to implement. Using the skills developed in the previous sessions, you will also demonstrate your fundraising mastery by creating a cultivation and solicitation plan for your donor(s), workshopping your new approach with your colleagues, and gaining feedback from our expert facilitator.

4:00 - 4:30 p.m.

Closing Comments and Final Q&A



INSTRUCTORS

Kathy Drucquer Duff, KDD Philanthropy

Built upon a passion for the impact of philanthropy and the relationships that make it possible, Kathy Drucquer Duff's 23 plus year advancement career underlies the expertise she provides to clients. Kathy is an executive advancement officer who has led teams in building transformative strategies: strategies that allow staff and colleagues to transform through growth, purpose and commitment, and strategies that allow donors to transform themselves and their passions through giving.

Kathy is helping non-profits and institutions transform the way they practice philanthropy to secure their success in the long term. She provides this expertise from her experience in developing fundraising plans that have secured gifts of up to 9 figures, and in building strategic talent management models that can be used by organizations of all sizes and operating budgets.

Kathy's "grow your own" fundraiser model was developed during the economic downturn of the 2000s when limited budgets did not allow for the robust hiring of new development staff. Instead, Kathy built a structured talent management program that maximized existing resources, inspired loyalty, and generated fundraising results. This approach has led to comprehensive programs in donor pipeline development, talent acquisition, new-hire onboarding, individualized retention, and in-house professional development.

Kathy has developed her breadth and depth of expertise at large, sophisticated institutions:

- Served as Associate Vice Chancellor of University Development at University of California San Diego (UCSD); led a team accountable for an annual goal of over \$70 million.
- Served as Vice President of Philanthropy for the Sharp HealthCare Foundation; designed and implemented a system-wide campaign approach and team structure for the Inspire campaign.
- Served as Associate Vice President of University Relations and Development for San Diego State University; led fundraising for the L. Robert Payne School of Hospitality and Tourism Management, including securing its naming gift; co-created an interdisciplinary fundraising plan for the university's first \$500 million comprehensive campaign.

Kathy is a sought-after consultant and speaker for industry associations including CASE and ADRP. She teaches a variety of fundraising essentials courses and webinars for Academic Impressions.



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

July 20 - 21, 2017 :: Atlanta, GA

HOTEL

InterContinental Buckhead Atlanta
3315 Peachtree Road NE
Atlanta, GA 30326

To reserve your room, please call 404-946-9000. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE

The rate is \$165 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES

A room block has been reserved for the nights of July 19 - 20, 2017.

RATE AVAILABLE UNTIL

Make your reservations prior to June 28, 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

This Atlanta luxury hotel is the perfect city retreat in the heart of Buckhead, Atlanta's thriving business and shopping district. Art Smith, the hotel's award winning chef, brings the freshest local ingredients to the table at Southern Art and Bourbon Bar, while treatments from the all organic SPA InterContinental offer a unique sense of relaxation. From the tastefully refined lobby to its premier location, this award winning luxury hotel defines city style.

TRANSPORTATION

The hotel is located 18 miles from Atlanta Hartsfield International Airport (ATL).

- Taxi: \$41.00 one way estimated
- Super Shuttle: \$35.00 one way estimated
- Train: \$2.00 one way estimated



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 Thursday, breakfast and lunch on Friday, 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.

CONFERENCE	WITH AI PRO MEMBERSHIP
Front-Line Fundraising: Essentials of Gift Solicitation	Get \$100 OFF with your AI Pro Membership
\$1,295	\$100 OFF

[Learn More](#)

EARLY BIRD PRICING

Postmarked on or before June 30, 2017. For registrations postmarked after June 30, 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.