

REVITALIZING YOUR LEADERSHIP GIVING PROGRAM

August 6-7, 2012
Philadelphia, PA

“This conference gave me the tools to elevate our leadership giving society with growth and upgraded gifts. I’m excited about the ideas that I’ll be taking back to my team.”

*– Jessica Hassay, Assistant Director, President’s Circle,
US Naval Academy Foundation*

“Most other conferences may address some of the topics we covered — buy-in, stewardship, solicitation, etc. — but this was the first conference I’ve attended where it actually was all about annual giving!”

*– Dianna Hernandez, Director, Annual Giving, University of
Southern California*

“For somebody who has worked in development for a couple of years now, it was a great learning experience. I learned very real, transportable skills here.”

*– Alex Morr, Assistant Director, Annual Giving,
Fordham University*

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OVERVIEW

A well-designed leadership giving program can provide your institution with a predictable revenue stream and a bridge to connect annual donors to their major giving potential. Unfortunately, these benefits can be washed away if you fail to design your leadership levels thoughtfully or do not place an emphasis on face-to-face annual solicitation techniques.

Join us in Philadelphia to reinvigorate the effectiveness of your leadership giving effort. Whether you are just getting started developing a program or have a program in place that needs an infusion of new ideas, this comprehensive conference will show you how to better define, fill, and maximize a leadership giving effort.

WHO SHOULD ATTEND

This conference is ideal for advancement professionals — especially annual giving directors — who are building or revamping a leadership giving program. Whether you are new to the field or have worked in advancement for several years, this event will help you with both planning and front-line skills that will bolster your leadership giving program.

LEARNING OUTCOME

After participating in this conference, you will be able to use a data-driven initial plan to more effectively define and fill a leadership giving program.

AGENDA

MONDAY, AUGUST 6, 2012

- 8:00 – 8:30 a.m. **Registration and continental breakfast (included in registration)**
- 8:30 – 8:45 a.m. **Welcome and opening remarks**
- 8:45 – 9:15 a.m. **Aligning Leadership Giving to Your Mission**
Revising a leadership giving effort is a fine goal, but a program can flounder unless it is in sync with your overall annual giving goals and how they work into your ongoing advancement engagement efforts — including a planned or current campaign. This session will help you understand how leadership giving can — and should — interact with your current goals.
- 9:15 – 10:45 a.m. **Thoughtfully Assessing and Resetting Your Leadership Levels**
Leadership giving levels set by “guesstimate” may succeed initially but will never maximize the potential of your prospects. This session will walk you through how to use your current data to make educated gift-level decisions and then give you the opportunity to sketch out an information-based structure that will get the most out of your donor pool.
- 10:45 – 11:00 a.m. **Morning break**
- 11:00 a.m. – 12:15 p.m. **Building Your Leadership Pipeline**
Establishing accurate levels is one thing; filling those levels is an entirely separate effort. This session will help you identify the individuals you should be bringing aboard and learn how to manage them effectively to match their interests to your higher levels.
- 12:15 – 1:15 p.m. **Lunch (included in registration)**

Design and
execute
a thriving
leadership
giving program.

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AGENDA

MONDAY, AUGUST 6, 2012 (CONTINUED)

- 1:15 – 2:30 p.m. **Communicating the Purpose and Impact of Your Leadership Giving Program**
Communicating the purpose of your program should be an engaging, not awkward, experience. This session will help you understand what messages and vehicles you should call on in addressing your different audiences. Particular attention will be paid to young alumni, social media, and how to make a compelling case for support.
- 2:30 – 2:45 p.m. **Afternoon break I**
- 2:45 – 3:45 p.m. **Leadership Giving Donor Stewardship That Works**
Effective stewardship of leadership donors is essential in moving donors through the donor pipeline. This session will explore how creative stewardship strengthens donor relationships and improves positioning for increased involvement (both in time as well as treasure) with your institution.
- 3:45 – 4:00 p.m. **Afternoon break II**
- 4:00 – 5:15 p.m. **Integrating Leadership Giving Donors with Major Giving**
As leadership donors progress through your leadership levels, an increasing number will be identified as major gift prospects. This session will define your role in coordinating that transition with your major giving team while also keeping annual commitments at the forefront of donors' minds.
- 5:30 – 6:30 p.m. **Networking reception (included in registration)**

TUESDAY, AUGUST 7, 2012

- 8:30 – 9:00 a.m. **Continental breakfast (included in registration)**
- 9:00 – 10:00 a.m. **Building Top-Level Buy-In for Your Effort**
How can you gain top-level buy-in for a leadership giving program that is based on your donor pool's data-driven capabilities? How should you frame your case if your institution has a current program that is not living up to its potential? In this session, you will learn how to present and quantify your planned program to upper-level management in a way that convinces them to implement change and allocate the necessary resources for success.
- 10:00 – 10:30 a.m. **Final conference break and hotel check-out**
- 10:30 a.m. – 12:00 p.m. **Developing Your Working Plan Moving Forward**
You've learned how to define accurate levels, identify donors to fill those levels, communicate your purpose effectively, and obtain the necessary resources for success. This session will help you prioritize your efforts and outline your work together moving forward. Following a brief discussion of the goals to such a plan, you will begin to design a longer-term plan for maximizing your program's effectiveness.
- 12:00 – 12:15 p.m. **Closing remarks and final Q&A**

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12:15 – 1:30 p.m. **Lunch for post-conference workshop participants (included in workshop registration)**

1:30 – 4:30 p.m. **Optional post-conference workshop: Front-Line Fundraising for Leadership Giving**

A new or refined leadership giving program in the annual giving office necessitates a greater reliance on relationship-based fundraising. In addition to a discussion of possible staffing options, this workshop will teach you the front-line skills necessary to ramp up your front-line effort, including:

- *Planning calls based on prospect data, anchor appointments, and budget pressures*
- *Tips for securing an initial appointment, including moving through assistants*
- *How to use the cultivation process to naturally build to the ask*
- *The pros and cons of using a proposal or white paper during your solicitation process*

INSTRUCTOR

Brian Daugherty, Director, Development and Alumni Relations, School of Law, University of San Diego

With more than 15 years of experience in development with a focus on annual giving and major gifts, Brian has worked for a variety of organizations in the nonprofit arena, including the Baltimore Symphony, the Baltimore Zoo, the University of Baltimore, the University of California, San Diego, and San Diego State University. His experience includes extensive work on telemarketing campaigns, direct mail, board management, volunteer solicitations, e-philanthropy, and personal solicitations. Brian has used his extensive experience in statistical data analysis and strategic planning to be an integral team member of capital campaigns ranging in scope from \$16 million to \$1 billion. A contributor to Currents magazine, he is a frequent presenter for the Council of Advancement and Support of Education (CASE) and the Annual Giving Professionals Network (AGPN).

HOTEL RESERVATIONS

The conference will be held at:

Loews Philadelphia Hotel
1200 Market Street
Philadelphia, PA 19107

To reserve your room, call 888.575.6397. 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 August 5 & 6, 2012. Reservations must be made by July 16, 2012. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Located in the heart of the city, steps away from the historic district, shopping, restaurants, and sports arenas, the Loews Hotel in Philadelphia is ideally situated for exploring the surrounding area. Just minutes from the Philadelphia International Airport and Amtrak's 30th Street Station, the hotel is convenient and accessible for travelers.



CFRE Continuing Education Credits

This event 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**

REGISTRATION FEES

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.

Postmarked on or before July 20, 2012

- Revitalizing Your Leadership Giving Program _____ \$995 USD
 Revitalizing Your Leadership Giving Program and post-conference workshop _____ \$1295 USD
(For registrations postmarked additional \$100 fee per registrant applies)

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., Ste. 800, Denver, CO 80237.

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Please charge my credit card: (Visa, MC, AmEx) _____
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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 11, 2012. A \$100 processing fee will be assessed. After May 11, 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.