



CONFERENCE

REVITALIZING YOUR DONOR RELATIONS PROGRAM

November 13 - 15, 2017

Orlando, FL



ai ACADEMIC
IMPRESSIONS



Improve the effectiveness of your stewardship efforts.

OVERVIEW

Develop a comprehensive donor relations strategy for every segment of your donors to improve the effectiveness of your engagement and cultivation efforts. This conference will allow you to explore the four pillars of a sound donor relations strategy and help you:

- Assess strengths and weaknesses of your current strategy
- Combat challenges faced when writing to donors
- Leverage data and reports to inform stewardship activities
- Develop a plan that is scaled to your institution

This program is facilitated by donor relations experts Angela Joens (University of California Davis), Sarah Simms (University of Florida), and Lynne Wester (Donor Relations Guru).

ONE OF AI'S BEST RATED EVENTS

This program remains one of Academic Impressions' highest rated events. Here's what 2016's attendees had to say:

"An excellent overview of best practices in donor relations"

"Provided me tools and strategies I can apply immediately"

"I liked the smaller group size—the instructors were accessible"

"Actual, actionable steps to implement to make my program better"

"The energy, content, and presenters were top notch"

"So much incredible content—breadth & depth"

"I have a strong direction to get things going"

This event is designed for those who need to breathe new life into their donor relations programs. Come learn from our expert instructors and walk away with actionable items that can be implemented immediately.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/conference/revitalizing-your-donor-relations-program-november-2017



FULL-DAY PRE-CONFERENCE WORKSHOP: THE FOUNDATIONS OF DONOR RELATIONS

If you are new to donor relations, we strongly encourage you to attend this full-day workshop. You will learn the foundations for a successful donor relations program and examine the four key pillars of donor relations:

- Stewardship and impact reporting
- Acknowledgements
- Donor recognition
- Events and engagement

You will leave this pre-conference workshop equipped with best practices to leverage in your everyday work.

WHO SHOULD ATTEND

Advancement professionals and teams looking to build or revamp their donor relations program cannot miss this conference. Our expert instructors will provide useful advice, whether you are new to the field or have worked in advancement for several years. When you register two attendees, a third registration is 50% off!

LEARNING OUTCOME

After participating in this conference, you will be able to revitalize your donor relations strategy to improve the effectiveness of your institution's stewardship efforts.

CONTACT US FOR MORE INFORMATION

Contact Gwen Doyle, Program Manager at gwen@academicimpressions.com or 720-988-1258 if you'd like additional information about the program.



AGENDA

DAY 1

Pre-Conference Workshop: The Foundations of Donor Relations

8:00 a.m. - 4:30 p.m.

Pre-Conference Workshop: The Foundations of Donor Relations (breakfast and lunch included in registration fee)

The donor relations field has grown and evolved tremendously over the last five years. If you are new to the field, this one-day pre-conference workshop will provide you with the foundations of a sound donor relations program. Highlighting the four key pillars of donor relations, there will be a sessions covering:

- Stewardship and Impact Reporting
- Acknowledgements
- Donor Recognition
- Events and Engagement

You will leave this pre-conference workshop equipped with best practices to leverage in your everyday work and the foundational knowledge to get the most out of the following two days.

DAY 2

8:00 - 8:30 a.m.

Conference Registration and Continental Breakfast (included in registration fee)

8:30 - 8:45 a.m.

Opening Comments and Introductions

8:45 - 9:15 a.m.

The Four Pillars of Donor Relations

Recapping the pre-conference workshop, this opening lecture will outline the critical components of a sound donor relations program: stewardship and impact reporting, acknowledgements, donor recognition, and events and engagement.

9:15 a.m. - 12:00 p.m.

Assessing Your Donor Relations Operations

This working session will allow you to work through the strengths and weaknesses of your existing stewardship strategy. Considering your relationships with your entire advancement shop and the four pillars of a sound donor relations program, you will work through an audit of your current donor relations practices to assess what you are doing well and identify where you can improve. Resources:

- Donor Relations Program Audit
- Donor Relations Fund Audit

12:00 - 1:00 p.m.

Lunch (included in registration fee)



AGENDA

DAY 2 (CONTINUED)

1:00 - 2:00 p.m.

Writing for Donor Relations

In a combination of lecture and working time, this session will give you examples of successful strategies to combat the common challenges that donor relations professionals face when writing to donors, such as:

- Writing in someone else's voice (president, vice president, etc.)
- Multiple acknowledgment letters to the same donor from different people
- Working with institutions' communications groups

2:00 - 3:00 p.m.

Elevating Your Reporting

Executed properly, a donor relations strategy can increase donor retention, grow giving, and inspire current donors to influence future donors. However, developing creative reports that deliver information out to donors beyond that traditional means is where we should be headed. This session will walk you through the latest and greatest reporting tactics that involve campus partners and better engage donors.

3:00 - 3:15 p.m.

Afternoon Break

3:15 - 4:30 p.m.

Responding to the Unexpected

Using topical donor case studies, our expert faculty will outline ethical dilemmas you may face when working with your donors. You will work in teams to develop response strategies that serve both your donors' and institution's interests.

4:30 - 5:30 p.m.

Networking Reception (included in registration fee)

DAY 3

8:30 - 9:00 a.m.

Continental Breakfast Roundtable Discussions (included in registration fee)

9:00 - 11:00 a.m.

Donor Relations for Top Donors

This afternoon will focus exclusively on donor relations strategy for your institution's top donors. These donors represent less than 10% of your supporters, but contribute to more than 90% of your gifts. Our expert facilitators will share a framework for:

- Engaging top donors through events
- Communicating with these top donors
- Developing an ongoing engagement strategy
- Creating customized stewardship plans



AGENDA

DAY 3 (CONTINUED)

11:00 a.m. - 12:15 p.m.

Donor Relations for Annual Giving

Building on the previous day's content, our expert faculty will outline a donor relations strategy for annual giving donors. You will learn why this group of donors can no longer be ignored and how to partner with your annual giving counterparts to ensure they are appropriately recognized. Specifically, strategies will cover appropriate recognition and engagement through events and targeted communications.

12:15 - 1:15 p.m.

Lunch (included in registration fee)

1:15 - 2:30 p.m.

Leveraging Technology for the Four Pillars

Now that you know how to develop your efforts across your donor populations, this session will guide you through using the technology and systems at your disposal to better systemize and complete your stewardship and donor relations plans.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 3:30 p.m.

Application and Faculty Consultation

Attendees will outline the donor relations strategies they will prioritize upon returning to campus. There will also be an opportunity for one-on-one faculty consultation during this time.

3:30 - 4:00 p.m.

Final Faculty Q&A, Conference Wrap-Up, and Evaluation



INSTRUCTORS

Angela Joens, Assistant Vice Chancellor of Development Outreach, University of California Davis

Angela has extensive management, development and stewardship experience. In her current role she supervises annual giving, donor relations, research and prospect management, proposal services, marketing and communications, and development recruitment.

Prior to UC Davis, Joens was Vice President of Development Operations for the Mercy Medical Center Foundation in Des Moines, Iowa. She also served as the Senior Director of Donor Relations for the Iowa State University Foundation and worked for RuffaloCODY a for-profit company that assists the non-profits with fundraising. Her career began as a fundraiser for the American Cancer Society.

Joens is also a non-profit consultant, an executive coach, and speaks nationally on topics related to stewardship, development and leadership. She has been featured in several industry publications including CASE Currents Magazine and the Chronicle of Philanthropy. Joens earned her BA from the University of Iowa, her MPA from Iowa State University, and her Professional Life and Work Coach Certificate from UC Davis. She is a proud volunteer for the Association of Donor Relations Professionals (ADRP) and the Council for the Advancement and Support of Education (CASE).

Sarah E. Sims, CFRE, Executive Director of Donor Relations, University of Florida

Sarah recently accepted the position as Executive Director of Donor Relations at the University of Florida where she leads the donor relations and special events teams in creating a culture of gratitude, recognition and engagement in conjunction with institution's first \$3B capital campaign. Sarah previously worked as the Director of Donor Engagement for Oklahoma State University Foundation creating and implementing individual stewardship and engagement plans for OSU's top tier donors. With more than ten years of experience in donor relations and frontline fundraising in a variety of higher education and non-profit settings, Sarah focuses on building strategic donor relationships while forwarding the mission of the organization. Sarah's volunteerism includes serving on the CASE IV Board of Directors and the Association of Donor Relations Professionals Conference Planning Committee.

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

November 13 - 15, 2017 :: Orlando, FL

HOTEL:

Hyatt Regency Orlando
9801 International Drive
Orlando, FL 32819

To reserve your room, please call 407-284-1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE:

The rate is \$189 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES:

A room block has been reserved for the nights of November 12, 13 and 14, 2017.

RATE AVAILABLE UNTIL:

Make your reservations prior to October 19, 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 the action on International Drive, Hyatt Regency Orlando brings you within minutes of world-famous theme parks while allowing you to escape in upscale accommodations with premium amenities, that include a number of pools, a gym, several restaurants and complimentary wifi.

The hotel is located approximately 12 miles from Orlando International Airport (MCO).



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 and lunch 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 + Full Day Pre-Conference Workshop	Conference only	Pre-Conference Workshop only	Get \$100 OFF With Qualifying AI Pro Memberships Learn More
\$1,995	\$1,395	\$995	\$100 OFF

EARLY BIRD PRICING

Postmarked on or before October 27, 2017. For registrations postmarked after October 27, 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.