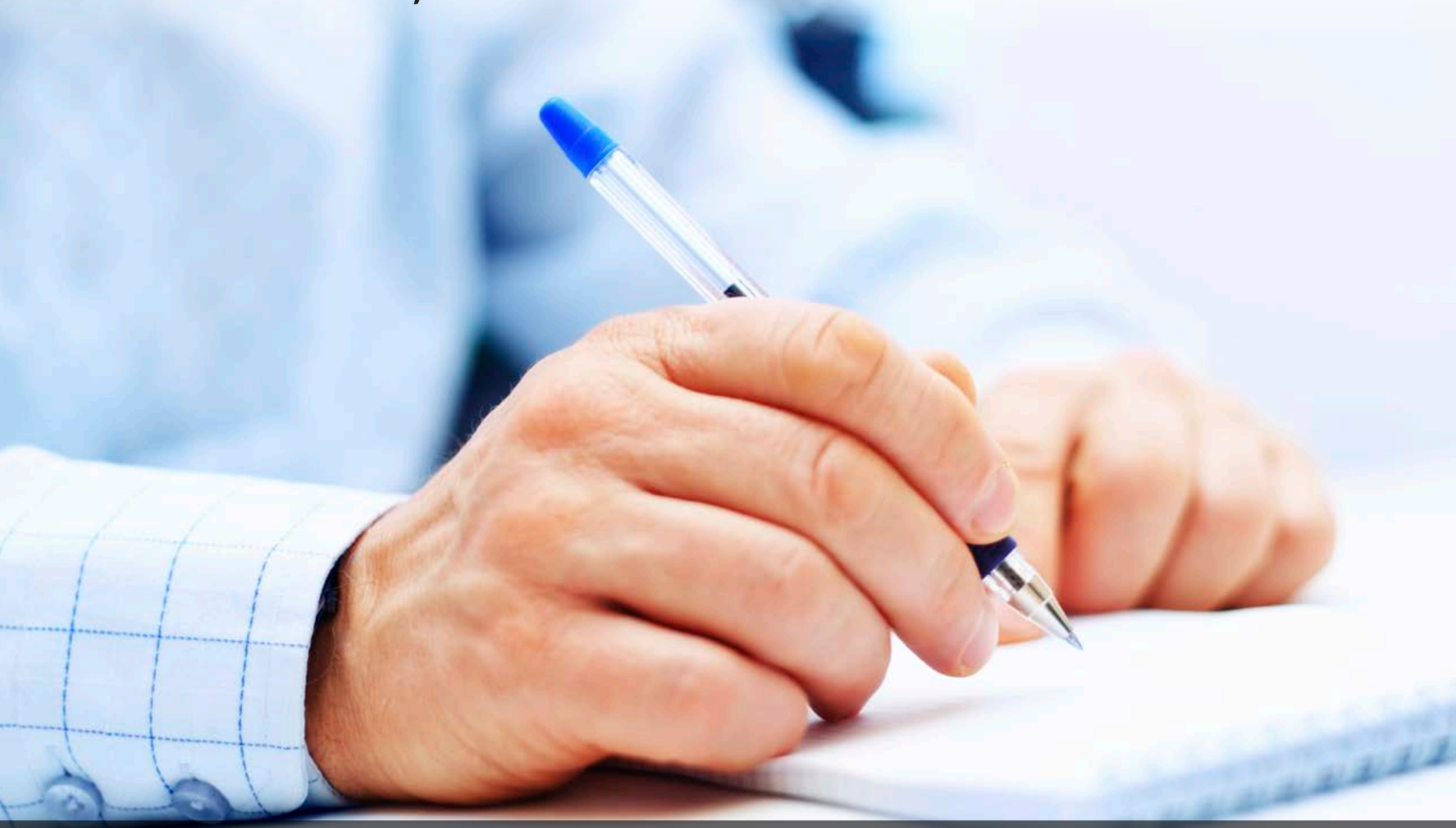
CONFERENCE

PORTFOLIO MANAGEMENT AND MAINTENANCE STRATEGIES FOR FUNDRAISING SUCCESS

December 13 - 15, 2017

New Orleans, LA



ACADEMIC IMPRESSIONS

Learn skills and strategies to better manage your fundraising portfolios

OVERVIEW

As portfolios grow larger and prospect pools widen, front-line fundraisers are finding greater need for clear portfolio management and maintenance strategies. Join us in New Orleans to hear from experts in the areas of front-line fundraising, prospect management, and prospect research as they share their insights to the essentials of good portfolio management. Whether you have a large portfolio that you are trying to prioritize, looking to clean up a portfolio that has not yielded results, or looking for strategies to better manage your time and processes, you will leave this highly-interactive conference with a new set of tools to enable you to be a more successful fundraiser.

WHO SHOULD ATTEND

Front-line fundraisers who are looking for new strategies to manage their portfolio and prospect pool will benefit most from this conference. Prospect managers and researchers looking to gain useful strategies and tools to assist in portfolio and prospect management are encouraged to attend in teams with their gift officers.

LEARNING OUTCOME

After participating in this conference, you will be able to manage and maintain your portfolio for greater fundraising success.

VISIT EVENT PAGE

www.academicimpressions.com/portfolio-management-and-maintenance-strategies-for-fundraising-success/

AGENDA

DECEMBER 13, 2017

12:30 - 1:00 p.m.
Registration for Conference Attendees

1:00 - 1:30 p.m.
Opening Comments and Introductions

1:30 - 2:30 p.m.
Understanding Prospect Life Cycles and Prospect Timelines
Having an understanding of prospect lifecycles and the timeline to cultivate a prospect are key fundamentals that will guide your portfolio. In this opening session, our expert speaker will discuss the fundamentals of prospect management and guide us through the current research and trends around portfolio management and prospect management. Having this information will allow you to better inform and prepare your overall portfolio management strategy.

2:30 - 2:45 p.m.
Afternoon Break

2:45 - 4:00 p.m.
Qualifying and Bringing New Prospects into Your Portfolio
In order to fill your pipeline, you will need to identify and qualify new prospects to bring into your portfolio. You will learn the key elements for qualification, review some quality examples, and leave this session with the tools to scale your efforts no matter your database. Working time to practice qualifying prospects is built into this session.

4:00 - 5:00 p.m.
Networking Reception (included in registration fee)

DECEMBER 14, 2017

8:30 - 9:00 a.m.
Continental Breakfast (included in registration fee)

9:00 - 10:15 a.m.
Developing Prospect Plans
This session will open with a look at strategy development and specific strategy components of developing a prospect plan. You will learn how you can use your database, and figure out how to build a "mini-campaign" timeline for each person. After learning the strategies and methods, you will work through examples that will allow you to practice the skills needed to develop your own prospect plans.

10:15 - 10:30 a.m.
Morning Break

AGENDA

DECEMBER 14, 2017 (CONTINUED)

10:30 a.m. - 12:00 p.m.
Moves Management: Moving a Prospect Up or Down
Too often, gift officers get stuck in donor transitions—unable to smoothly move prospects through cultivation, solicitation, and stewardship, and subsequently upgrade them to the next giving level. In this session, you will assess and develop strategies for your portfolio of donors by focusing on:

- The right questions to ask and when to ask them
- 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

12:00 - 1:15 p.m.
Lunch (included in registration fee)

1:15 - 2:30 p.m.
Routine Maintenance and Ongoing Assessment of Portfolios
Having your routine established and scheduling time to assess your portfolio will be critical to your success as a fundraiser. In this session, you will learn key strategies and tips for better prioritizing your time, gain strategies on developing a regular portfolio maintenance schedule and routine, and learn to set realistic goals for yourself. You will also be armed with the information necessary to make the case for downsizing and shrinking your portfolio, or keeping a smaller portfolio, as research shows that greater fundraising success comes from those with a manageable load.

2:30 - 2:45 p.m.
Afternoon Break

2:45 - 4:00 p.m.
Working Effectively with Prospect Research and Prospect Management
Prospect research and prospect management teams can be best partners in organizing your portfolio and managing your leads. Whether these teams assist you with more reactive or proactive research that feeds you qualified leads, you will learn strategies for scheduling check-ins and meetings, as well as how to best align goals and expectations. Even if you do most of your research independently, you will learn the principles of prospect research strategy to help guide your efforts. After hearing from our panel of speakers, you will be able to develop a collaborative effort with prospect research and prospect management that serves both sides of the shop effectively.

DECEMBER 15, 2017

8:30 - 9:00 a.m.
Continental Breakfast (included in registration fee)

9:00 - 10:15 a.m.
Aligning Performance Metrics to Meet Goals
Setting up your own parameters and goals are key to your success as a gift officer and portfolio manager. In this session, our expert speaker will describe how to align key performance metrics with institutional and shop metrics. You will leave this session with a clear understanding of how to incorporate performance metrics to your overall portfolio strategy and success as a fundraiser.

10:15 - 10:30 a.m.
Morning Break

AGENDA

DECEMBER 15, 2017 (CONTINUED)

10:30 - 11:45 a.m.
Next Steps: Performing Preliminary Maintenance and Building Your Portfolio
Now that you are armed with strategies to manage and maintain your portfolio, the first thing you will need to do is perform some preliminary maintenance to clean up your portfolio. Whether you inherited a portfolio or are building one from scratch, this session will help you analyze and assess your portfolio and effectively organize it so that you can proceed with your regular maintenance and prospect management strategies. Based on what you will be tracking, you will review what reports you should be utilizing and developing, and what steps to take to manage your current opportunities.

11:45 a.m. - 12:15 p.m.
Final Q&A and Evaluations

INSTRUCTORS

Rikki Bryant, Associate Director, Development, The Medical Foundation of North Carolina, Inc.
Rikki Bryant supports twenty-five development officers in the areas of prospect management and research. Her prospect management program is currently being adopted throughout the UNC development community. She consults and advises colleagues across UNC on topics such as prospect pipeline development, portfolio data visualization, reporting, data management best practices, and prospect research resources.

Rikki previously worked at the University of Houston, serving in a leadership capacity for the advancement services team, representing the Data Management Department. She also presided over the University Advancement condolence process; her specialty family history research for a stewardship project received an honorable mention from CASE District IV. Amongst other notable accomplishments, Rikki helped to raise $7 million for a Steinway Piano initiative at the Rebecca & John J. Moores School of Music.

Kathy Drucquer Duff, Founder and President, KDD Philanthropy
Kathy is an executive advancement officer with over 23 years of experience helping non-profits and institutions transform the way they practice philanthropy. Kathy provides this expertise from her experience in higher education, where she developed fundraising plans that have secured gifts of up to 9 figures. The “grow your own” fundraiser model that Kathy developed is built on a structured talent management program that maximizes existing resources, inspires loyalty, and generates 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’s experience includes serving as the Associate Vice Chancellor of University Development at University of California San Diego, the Vice President of Philanthropy for the Sharp HealthCare Foundation, and the Associate Vice President of University Relations and Development for San Diego State University. Kathy is a sought-after consultant and speaker for industry associations including CASE and ADRP, and speaks on a variety of fundraising trainings with Academic Impressions.

THE CONFERENCE EXPERIENCE

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 • 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 recomend 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

December 13 - 15, 2017 :: New Orleans, LA

HOTEL

Hyatt Regency New Orleans
601 Loyola Avenue
New Orleans, LA 70113

To reserve your room, please call (504) 561-1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

ROOM RATE

The rate is $169 for single or double occupancy, plus applicable tax.

ROOM BLOCK DATES

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

RATE AVAILABLE UNTIL

Make your reservations prior to November 21, 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

The Hyatt Regency New Orleans offers you several restaurants, modern facilities, plus a full-service Starbucks, and 24-hour grab-n-go fresh market.

The Hyatt Regency is located approximately 15 miles from Louis Armstrong International Airport (MSY) and is conveniently located within walking distance of many of the city's most popular historic sites, entertainment and sports venues, including the neighboring Mercedes Benz Superdome.

PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PRICING (CIRCLE ONE)

Your registration fee includes: Full access to all conference sessions and materials, access to the networking reception on Wednesday, breakfast and lunch on Thursday, and breakfast 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.

Corporate surcharge: $500

CONFERENCE	WITH AI PRO MEMBERSHIP
Portfolio Management and Maintenance Strategies for Fundraising Success	Get $100 OFF With Qualifying AI Pro Memberships Learn More
$1,495	$100 OFF

EARLY BIRD PRICING

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

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

100% SATISFACTION PROMISE

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.