

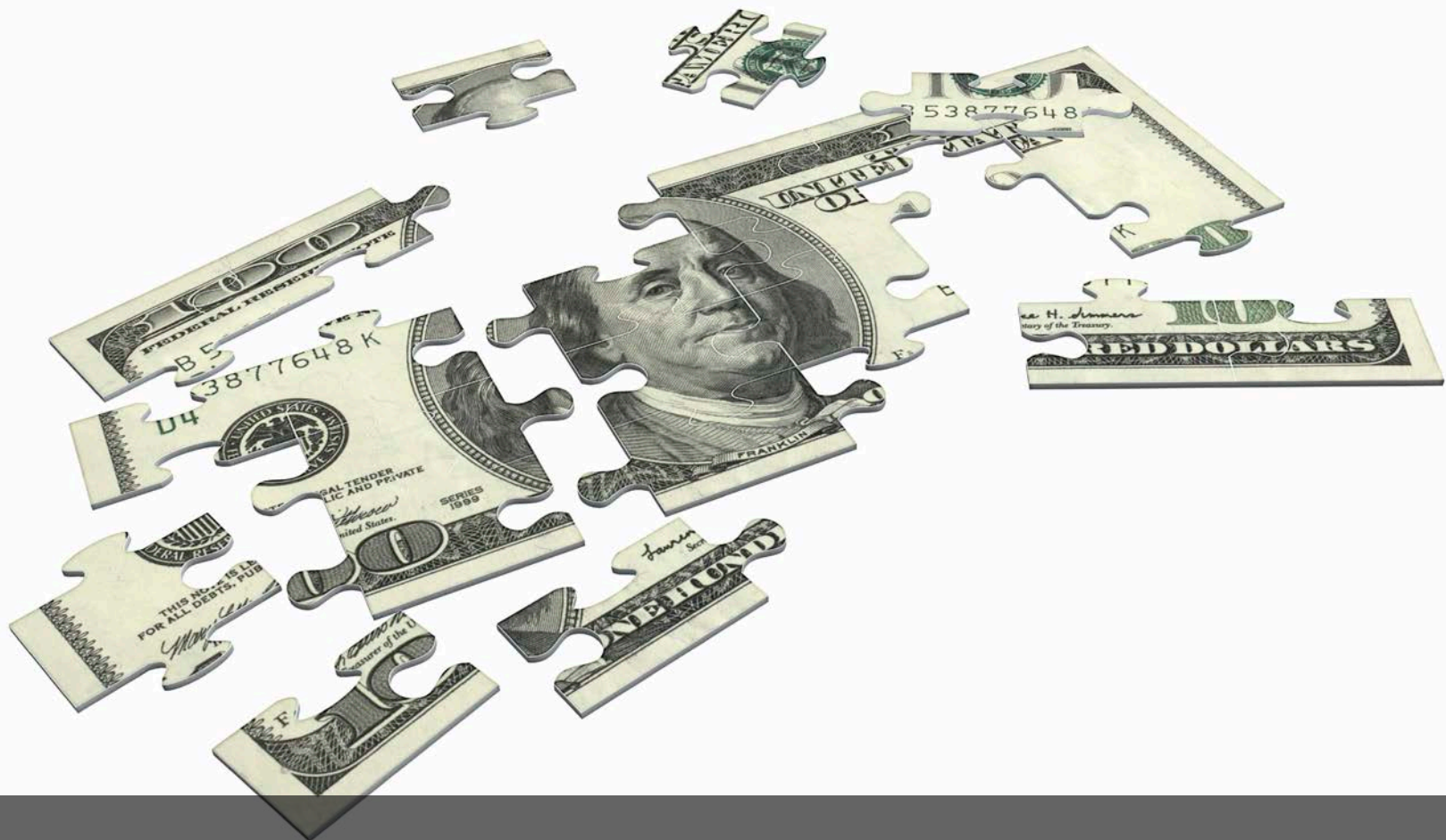


CONFERENCE

# A COMPREHENSIVE APPROACH TO MODERN CAMPAIGNS

February 20 - 22, 2017

San Antonio, TX





*Learn critical skills for resourcing, improving engagement, and overcoming campaign challenges.*

## OVERVIEW

Join us and learn the best solutions and strategies for approaching a modern campaign. No matter where you are in your campaign, this practically focused conference will give you the insight you need to strategically plan for and execute your goals. Conference sessions will focus on targeted topics including:

- Staffing and Training
- Budgeting and Infrastructure
- Donor Relations and Stewardship During Campaigns
- Combatting Donor Fatigue
- Working Strategically with Campaign Counsel
- Aligning Donor Interests with Campaign Priorities
- Planning for and Managing Unexpected Events

Ending with a capstone working session, you will have the opportunity to create an action plan to move your campaign forward. With the help of our expert presenters and your peers, you will share and workshop your plan to apply what you learned throughout the event.

**To ensure a productive learning and working environment this program is limited to just 50 attendees. Teams that register two individuals can register a third for 50% off!**

## PRE-CONFERENCE WORKSHOP: FOUNDATIONS OF MODERN CAMPAIGNS

This pre-conference session provides a thorough overview of structural basics including goal setting, timelines, and budgets of fundraising campaigns. You will gain insights on proven methods and strategies to campaign management.

## POST-CONFERENCE WORKSHOP: STRATEGIC CAMPAIGN COMMUNICATIONS

This interactive workshop includes examples of effective communications, time to assess your campaign materials in real time, and feedback from our experts and your peers to help draft more effective communication pieces in the future.

[VISIT EVENT PAGE](#)

[www.academicimpressions.com/conference/comprehensive-approach-modern-campaigns](http://www.academicimpressions.com/conference/comprehensive-approach-modern-campaigns)



## BRING YOUR CAMPAIGN PLANNING TEAM

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Advancement professionals that work in front-line fundraising, campaign planning, and advancement leadership will benefit from this comprehensive conference focused on strategy, engagement, resourcing, and managing the challenges of modern campaigns. Teams will benefit from attending this conference with the collaborative approach these sessions provide.

**To encourage team participation when you register two individuals a third can attend for 50% off!**

## LEARNING OUTCOME

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After participating in this conference, you will be able to resource your campaign effectively and plan accordingly for fundraising success.

## CONTACT US FOR MORE INFORMATION

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Contact David Boggs, Associate Program Manager [David.Boggs@academicimpressions.com](mailto:David.Boggs@academicimpressions.com) or 720-988-1215 if you'd like additional information about the program.



## AGENDA

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### MONDAY, FEBRUARY 20, 2017

8:00 - 9:00 a.m.

**Registration for Workshop Attendees and Continental breakfast (included in registration fee)**

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

**Pre-Conference Workshop: Foundations of Modern Campaigns**

New to campaigns? This session provides a thorough overview of structural basics including goal setting, timelines, and budgets. Our expert presenters will share insights on proven methods and strategies to campaign management. Workshopping a case study will give you the tools needed to take back to your institution and get your team headed in the right direction.

12:00 - 1:00 p.m.

**Lunch (included in registration fee)**

12:30 - 1:00 p.m.

**Registration for main conference attendees**

1:00 - 1:15 p.m.

**Opening comments and introductions**

1:15 - 2:15 p.m.

**Understanding Successful Campaigns**

In this opening session, our panel of expert faculty will outline their perspectives on modern campaigns and recent trends in the field. They will highlight the variety of campaigns commonly pursued and the merits of each model. Discussing the common denominators of a successful campaign, they will share insights on how to prepare your institution for campaign success.

2:15 - 2:30 p.m.

**Afternoon break**

2:30 - 4:00 p.m.

**Resourcing a Campaign: Staffing, Training, and Supporting the Front-line**

Running a campaign in today's economic climate takes a strategic blend of resources. During this session you will gain practical tips for staffing, training, and supporting your front-line fundraisers. Working through an activity on organizing a training development program, you will have the tactics and strategies necessary to bring on new gift officers and fundraising staff.

4:00 - 4:30 p.m.

**Day 1 Wrap-up and Q&A**

4:30 - 5:30 p.m.

**Networking reception (included in registration fee)**



## AGENDA

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### TUESDAY, FEBRUARY 21, 2017

8:30 - 9:00 a.m.

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

9:00 - 10:30 a.m.

**Resourcing a Campaign: Infrastructure and Budget Working Session**

Working through an exhaustive checklist for staff, infrastructure, and budgetary resources, you will leave this session with an understanding of what you need to fully resource a modern campaign.

10:30 - 10:45 a.m.

**Morning break**

10:45 - 11:45 a.m.

**Working Strategically with Campaign Counsel**

As more institutions find the benefits of working with campaign counselors, the need to collaborate strategically is essential to get correct research data, donor information, and saving with overall costs. Whether you are utilizing outside counsel for your feasibility studies, strategic planning, or other frontline work, ensure you are getting the most for your dollar and are teaming appropriately to get the information and support you need.

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

**Lunch (included in registration fee)**

12:45 - 2:00 p.m.

**Donor Relations in Campaign: Donor Fatigue, Multiple Asks, and Naming Opportunities**

Stewardship for your most major donors is easy, but campaigns can present a unique set of challenges as you nurture and build these prized relationships. This session will deal with topics of handling donor fatigue, managing dual and triple asks, and navigating naming opportunities.

2:00 - 3:00 p.m.

**Donor Relations in Campaign: Stewarding Your Multi-Generational Donor Base**

Knowing which stewardship activities are most appropriate and effective during the planning, silent, public, and closing phases of the campaign are important, especially when it comes to your multi-generational donor base. This session will help you build a donor relations focus into your campaign plans and formulate meaningful ways to keep your constituencies of all varieties feeling informed and appreciated.

3:00 - 3:15 p.m.

**Afternoon break**

3:15 - 4:45 p.m.

**Aligning Donor Interests with Campaign Priorities: A Front-line Approach**

You spend months, even years, identifying and articulating campaign priorities with internal stakeholders; yet, inevitably, your top donors have interests in funding projects that lie outside the official scope of the campaign. During this session, our speakers will share insights on navigating the details of closing a gift, aligning internal and external priorities, and ensuring dollars are being allocated appropriately without compromising campaign (or prospect) priorities.

4:45 - 5:00 p.m.

**Day 2 Wrap-up and Q&A**



## AGENDA

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### WEDNESDAY, FEBRUARY 22, 2017

8:30 - 9:00 a.m.

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

9:00 - 11:00 a.m.

**Planning for and Managing the Unexpected**

Sometimes the unexpected happens. Your President stepped down, or you lost your AVP of Advancement mid-campaign. Maybe there is a touchy PR issue that is threatening the relationships with your donors and prospects. You might even be mid-campaign and realize you don't have the budget, staff, or donor support to accomplish your proposed goals. Sometimes it is necessary to reassess, realign, and restructure mid-stream. Working through some sample scenarios, this session gives you the tools and tactics necessary to remain successful in your campaign efforts no matter what might come up.

11:00 - 11:15 a.m.

**Morning Break**

11:15 - 11:45 a.m.

**Break Out Session and Project Review**

Building on the core content covered in the previous two days, this session will focus on identifying your next steps in the campaign planning and management process. Working in small groups, our expert faculty will facilitate conversations around campaign goals, initiatives, and concerns. You will have the opportunity to present your project and plan, and get feedback from your peers and colleagues as well. Case study projects will be provided for those looking to work on a sample model.

11:45 a.m. - 12:15 p.m.

**Closing Comments and Final Q&A**

### **Post Conference Workshop: Strategic Campaign Communications**

12:15 - 1:00 p.m.

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

1:00 - 4:00 p.m.

**Post Conference Workshop: Strategic Campaign Communications**

This interactive workshop will focus on strategic campaign communications and the future of campaign case statements. Our expert instructor will show examples of effective communications, review your own campaign materials, and provide feedback to help you develop more compelling messages for your donors. You will then complete a campaign communications audit and work to draft more effective communications pieces for the future. You will leave this session equipped with tools to assess and continuously improve your own campaign materials when you return to campus.

4:00 - 4:30 p.m.

**Post-Conference Wrap-Up and Final Q&A**

**Dexter Bailey, Senior Vice President for Advancement; Executive Director of the Stony Brook Foundation, SUNY Stony Brook University**

Dexter A. Bailey Jr. is a fundraising executive with over 25 years of experience building successful programs at both public and private universities including Worcester Polytechnic Institute, UC Berkeley, University of Washington, Ohio University, and now at Stony Brook University. During his career, he has been directly involved in raising over \$700 million. He is also the executive director of the Stony Brook Foundation, a private 501(c) (3) with \$500 million in total assets.

His expertise includes reengineering comprehensive fundraising programs, complex principal gift strategy development, alumni relations, staffing development and comprehensive campaign implementation. Dexter is often invited to speak around the country on issues related to leadership in advancement, principal gifts strategies and the role and experience of minorities in university advancement.

As senior vice president of advancement at Stony Brook University, his fundraising responsibilities encompass Stony Brook University, Stony Brook University Hospital, Stony Brook Children's Hospital and the campuses in Southampton, New York; Turkana Basin Institute, Kenya; SUNY Korea; and Centre ValBio, Madagascar.

Since Dexter arrived in 2011, Stony Brook has launched a \$600 million campaign that is unprecedented in the State University of New York (SUNY) system. To date, the campaign has generated more than \$468 million, including a historic \$150 million lead commitment. In 2014, the Council for Advancement and Support of Education recognized Stony Brook's fundraising program for "Overall Performance" and "Overall Improvement" among peer public research universities.

Dexter earned a BS in journalism from the E.W. Scripps School of Journalism at Ohio University and an MBA from the University of Toledo.

**James M. Langley, Founder and President, Langley Innovations**

Before forming his own comprehensive advancement consulting firm, Jim served as vice president for advancement at Georgetown University. At Georgetown, he led the institution's offices of alumni affairs, strategic communications and marketing, development, medical center development, and advancement services. During his tenure, he produced record numbers in new commitments and dollars, despite a difficult economy. He also launched a number of innovative programs, including the acclaimed Student Discovery Initiative.

Jim arrived at Georgetown after spending eight years as the vice president for advancement at the University of California, San Diego. At UCSD, he led the planning and execution of the institution's seven-year \$1 billion campaign, then raised almost half the target amount in three years, despite a weak economy. Jim also previously served as vice president for external affairs at Georgia Institute of Technology, increasing annual gift income from \$26 million to \$76 million and more than tripling the institution's endowment to well over \$500 million. Operations under his management have won awards in virtually every area of university advancement.

**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](http://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                                                   |    | <b>Intimate, workshop-style event with personalized attention</b>                                                                                                                                                                                                        |
| Many concurrent sessions; forcing choice                                       |    | <b>One focused learning track</b>                                                                                                                                                                                                                                        |
| Uneven sessions and less outcome-focused, driven by an open call for proposals |    | <b>Needs-driven</b> and meticulously planned with practical outcomes <ul style="list-style-type: none"> <li>Action plans and next steps to use upon returning to campus</li> <li>Carefully-vetted expert instructors that are also practitioners in the field</li> </ul> |
| Lecture-based                                                                  |    | <b>Learner-centric</b> and designed for interaction and collaboration                                                                                                                                                                                                    |
| Large networking events with vendors                                           |    | Small-scale opportunity to <b>truly connect with colleagues</b> in the same position at other institutions                                                                                                                                                               |
| Some slide presentations posted online after the event                         |    | <b>200+ page workbooks</b> 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

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February 20 - 22, 2017 :: San Antonio, TX

### HOTEL:

Westin Riverwalk  
420 W. Market St  
San Antonio, TX 78205

To reserve your room, please call 210 224-6500. Please indicate that you are with the Academic Impressions group to receive the group rate.

### ROOM RATE:

The rate is \$219 for single or double occupancy, plus applicable tax.

### ROOM BLOCK DATES:

A room block has been reserved for the nights of February 19, 20 and 21, 2017.

### RATE AVAILABLE UNTIL:

Make your reservations prior to February 2, 2017. There are a limited number of rooms available at the conference rate. Please make your reservations early.

### ADDITIONAL INFORMATION:

Named as one of the World's Best Places To Stay by Conde Nast Traveler's acclaimed Gold List, The Westin Riverwalk, San Antonio Hotel features Zocca, one of the city's most exciting dining destinations, bar, coffee shop, spa services, and much more.

### TRANSPORTATION:

- SATRANS
  - » Fee: 32 USD; Round trip
  - » Travel Time: 12 minutes
  - » Contact: (210) 281-9900; Reservation Required
  - » About: SATRANS provides regularly scheduled shuttle service from the airport to downtown hotels. Shuttle tickets are sold at the baggage claim areas in both terminals.
- Yellow Taxi
  - » Fee: 24 USD
  - » Hours: 24 hours
  - » Travel Time: 12 minutes



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 Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, 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.

A \$500.00 surcharge applies to registrants from corporations.

|                                                                                                    |                                                                                                     |                                                                                     |                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>BEST VALUE</b></p> <p>Conference<br/>+<br/>Both Workshops</p> <p><b>\$1,895</b></p>          | <p><b>CONFERENCE</b></p> <p>Conference only</p> <p><b>\$1295</b></p>                                | <p><b>WORKSHOP</b></p> <p>Pre-Conference Workshop<br/>only</p> <p><b>\$395</b></p>  | <p><b>WITH AI PRO MEMBERSHIP</b></p> <p>Get \$100 OFF With<br/>Qualifying AI Pro<br/>Memberships</p> <p><a href="#">Learn More</a></p> <p><b>\$100 OFF</b></p> |
| <p><b>BEST VALUE</b></p> <p>Conference<br/>+<br/>Pre-Conference Workshop</p> <p><b>\$1,595</b></p> | <p><b>BEST VALUE</b></p> <p>Conference<br/>+<br/>Post-Conference Workshop</p> <p><b>\$1,595</b></p> | <p><b>WORKSHOP</b></p> <p>Post-Conference Workshop<br/>only</p> <p><b>\$395</b></p> |                                                                                                                                                                |

### EARLY BIRD PRICING

Postmarked on or before February 3, 2017. For registrations postmarked after February 3, 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](http://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.

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### 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.