



CONFERENCE

# LEADERSHIP ANNUAL GIVING: KEY COMPONENTS OF A SUCCESSFUL PROGRAM

August 7 - 8, 2017

Phoenix, AZ





---

*Build, measure, and improve your leadership annual giving program.*

---

## OVERVIEW

---

Learn how to successfully build and grow your leadership annual giving program to strengthen your institution's donor pipeline. Even with a successful leadership annual giving program, you may need to reassess your giving levels, goals, and donor pools. Through a combination of presentations and working sessions you will develop a strategy to:

- Bolster your frontline effort
- Build leadership annual and major gift donor pipelines
- Set and communicate with various giving levels
- Steward and cultivate leadership donors to become major donors

## LEARN PRACTICAL STRATEGIES YOU CAN USE

---

This conference provides an active learning and working environment to improve your leadership annual giving program. You will participate in discussion and working sessions designed to give you practical ideas that you can implement immediately.

*"We attended the conference and post-con with a newly formed team of fundraisers, each with less than 2 years of experience. We had scheduled a full slate of visits immediately after the conference where everyone felt better prepared, more confident, and had very productive conversations and outcomes. They were able to immediately apply the concepts and strategies presented at the conference; this was a fantastic investment in their training and development!"*

**- Ruth Rosenberg, Director of Leadership Annual Giving, University of Delaware**

[VISIT EVENT PAGE](#)

[www.academicimpressions.com/conference/leadership-annual-giving-key-components-successful-program-august-2017](http://www.academicimpressions.com/conference/leadership-annual-giving-key-components-successful-program-august-2017)



## WHO SHOULD ATTEND

---

This conference is ideal for both new and seasoned annual giving professionals who are building or revamping a leadership annual giving program. You will leave this event with the skills to bolster your leadership annual giving program.

## LEARNING OUTCOME

---

After participating in this conference, you will be able to build your leadership annual giving efforts with an understanding of the key components of a successful program.

## CONTACT US FOR MORE INFORMATION

---

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



## AGENDA

---

### MONDAY, AUGUST 1, 2016

8:00 - 8:30 a.m.

**Registration and continental breakfast (included in registration fee)**

8:30 - 9:00 a.m.

**Welcome and opening remarks**

9:00 - 9:30 a.m.

**Aligning Leadership Annual Giving with Your Goals and Mission**

A leadership annual giving program will not succeed unless it is in sync with your overall annual giving goals. It is important to incorporate it into your ongoing advancement efforts, including upcoming or current campaigns. This session will help you understand how leadership giving can—and should—work in tandem with your current goals.

9:30 - 10:30 a.m.

**Assessing and Resetting Your Leadership Levels**

This session will explore different leadership annual giving recognition clubs and society models. You will also learn about the methodology of giving structures, and how to determine alternate models of recognition. Unsure if your current levels are appropriate? We will show how and when to make educated gift-level adjustments.

10:30 - 10:45 a.m.

**Morning break**

10:45 - 11:15 a.m.

**Working Session: Assessing and Resetting Your Leadership Levels**

After understanding how to thoughtfully set your giving levels, you'll have time to take a look at your current giving data to assess whether or not you should consider altering your current recognition levels.

11:15 a.m. - 12:30 p.m.

**Building Your Leadership Pipeline**

Establishing appropriate giving levels is one thing; filling those levels is an entirely separate effort. This session will help you identify the individuals you should be soliciting as leadership annual donors and learn how to manage them effectively to match their interests to their highest potential.

12:30 - 1:30 p.m.

**Lunch (included in registration fee)**

1:30 - 3:00 p.m.

**Frontline Fundraising: Goals and Metrics, Tactics and Process**

To be an effective leadership annual giving officer, you must gain the skills in achieving and managing the personal visit. First, we'll tackle understanding how to set goals and metrics, then we'll begin talking about the necessary legwork to cultivate donors for this type of solicitation.

3:00 - 3:15 p.m.

**Afternoon break**



## AGENDA

---

### MONDAY, AUGUST 1, 2016 (CONTINUED)

3:15-5:15 p.m.

#### **Frontline Fundraising: From Cold Calls, Managing the Visit, and Making the Ask**

We'll continue the afternoon with the fundraising skills needed to get visits, how to ensure that they are productive, and how to create the culture that ensures buy-in for these future major donors. The session will include role plays to put the content into practice.

5:15 - 6:15 p.m.

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

### TUESDAY, AUGUST 2, 2016

8:30 - 9:00 a.m.

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

9:00 - 10:00 a.m.

#### **Communicating the Purpose and Impact of Your Leadership Annual Giving Program**

Communicating the purpose of your program should be an engaging experience. This session will help you understand what messages and vehicles you should use in addressing your different audiences. Particular attention will be paid to young alumni, social media, and how to make a compelling case for support..

10:00 - 10:15 a.m.

#### **Morning break**

10:15 a.m. - 11:30 p.m.

#### **Stewarding Leadership Giving Donors**

Effective stewardship of leadership donors is essential in moving donors through the donor pipeline. Here we will explore how creative stewardship strengthens donor relationships and improves positioning for increased involvement with your institution.

11:30 a.m. - 12:30 p.m.

#### **Integrating Leadership Giving Donors with Major Giving**

As donors progress through your leadership annual giving 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.

12:30-1:30 p.m.

#### **Lunch**

1:30 - 2:30 p.m.

#### **Building Buy-In for Your Effort**

How can you gain management buy-in for a leadership annual giving program that is based on your donors' capabilities? How should you frame your case if your institution has a leadership annual giving program that is not living up to its potential? In this session, you will learn how to quantify and present your program to upper-level management in a way that convinces them to implement change and to allocate the necessary resources for success.



## AGENDA

---

### TUESDAY, AUGUST 2, 2016 (CONTINUED)

2:30 - 2:45 p.m.

**Afternoon break**

2:45 -3:45 p.m.

**Tying It All Together and Developing a Plan of Action**

You've learned how to define appropriate recognition levels, identify donors to fill those levels, communicate your purpose effectively, and obtain the necessary resources for success. This session will now help you prioritize your efforts and outline your work moving forward. Following a brief discussion of the goals for such a plan, you will begin to design a longer term plan for maximizing your program's effectiveness.

3:45 - 4:15 p.m.

**Final Q&A, Closing Remarks, and Conference Evaluation**



## INSTRUCTOR

---

### **Brian Daugherty, Senior Vice President & Chief Philanthropy Officer, San Diego Humane Society**

With more than twenty 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 Orchestra, the Maryland Zoo in Baltimore, the University of Baltimore, the University of California, San Diego San Diego State University and the University of San Diego. 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 has been a frequent presenter for the Council for Advancement and Support of Education (CASE) and the Annual Giving Professionals Network (AGPN).

## TESTIMONIALS

---

*"We attended the conference and post-con with a newly formed team of fundraisers, each with less than two years of experience. We had scheduled a full slate of visits immediately after the conference where everyone felt better prepared, more confident, and had very productive conversations and outcomes. They were able to immediately apply the concepts and strategies presented at the conference; this was a fantastic investment in their training and development!?"*

**- Ruth Rosenberg, Director of Leadership Annual Giving, University of Delaware**

*"The AI conference on Leadership Annual Giving was the best use of my PD dollars in years. The content was relevant and the presenters were actual fundraisers—not consultants—so they were relatable, knowledgeable, and provided real answers/solutions to questions/obstacles. The material was practical—not conceptual—and so there was great value."*

**- Ann Wardwell, Director of Advancement, Fay School**

*"AI's Leadership Annual Giving: Key Components of a Successful Program is packed with relevant strategies and tools that can enhance my annual giving program. The content is rich and practical for my role and goals. I'd recommend this conference to advancement professionals who want to start or build out their leadership annual giving program."*

**- Jennifer Mora Hernandez, Director of Annual Giving, University of California Berkeley**

*"As part of a team of two who were tasked to develop and execute a leadership annual giving program, I felt that we were leaving with great "Marching Orders." I feel that with patience and strategic discussion (and the workbook we received) we can build a successful program. Stay tuned!"*

**- Adrienne McDade, Associate Director of Annual Giving, University of Cincinnati**



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

---

August 7 - 8, 2017 :: Phoenix, AZ

### HOTEL:

Hyatt Regency Phoenix  
122 N. Second Street  
Phoenix, AZ 85004

To reserve your room, please call 602.252.1234. Please indicate that you are with the Academic Impressions group to receive the group rate.

### ROOM RATE:

The rate is \$109 for single or double occupancy, plus applicable tax.

### ROOM BLOCK DATES:

A room block has been reserved for the nights of August 6 and 7, 2017.

### RATE AVAILABLE UNTIL:

Make your reservations prior to July 17, 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:

Experience the tranquil beauty of the Southwest combined with the exhilarating energy of a vibrant cosmopolitan city at Hyatt Regency Phoenix. Situated in the center of downtown Phoenix, the hotel is adjacent to the Phoenix Convention Center and steps away from sports venues, dining and shopping.

### LOCATION AND TRANSPORTATION:

- PHX Sky Harbor International Airport (PHX) is 6 miles/10 minutes from hotel
- Taxi is approximately \$18 each way
- Phoenix Light Rail is \$2 per person each way



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!

Save \$250 for every two registrants you send.

CONFERENCE	WITH AI PRO MEMBERSHIP
Leadership Annual Giving: Key Components of a Successful Program	Get \$100 OFF with your AI Pro Membership
<a href="#">Learn More</a>	
\$1,395	\$100 OFF

### EARLY BIRD PRICING

Postmarked on or before July 21, 2017. For registrations postmarked after July 21, 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](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.

---

### 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.