



CONFERENCE

FRONTLINE FUNDRAISING: ESSENTIALS OF GIFT SOLICITATION

January 22 - 24, 2018

Orange County, CA





More confidently solicit prospects and donors.

OVERVIEW

Designed for institutions who have a number of gift officers, academic leaders, and/or volunteers who need to be quickly on-boarded to achieve greater fundraising success, this workshop is a great fit if you want to train a group of people and are looking for an approach to fundraising that is both more successful and rewarding. This workshop:

- Immediately impacts fundraising results
- Gets people new to philanthropy up-to-speed quickly
- Provides a more strategic and successful approach to identifying prospects and cultivating donors
- Is highly practical and skills-based, and can get an entire team of frontline fundraisers on the same page fast

WHO SHOULD ATTEND

New and experienced frontline fundraisers, academic leaders, and fundraising volunteers who want to improve or refresh solicitation skills. Whether you focus on annual giving, major giving, principal giving, or planned giving, you will leave with increased confidence in your calls, asks, and portfolio management skills.

LEARNING OUTCOME

After participating in this conference, you will be able to more effectively solicit prospects and donors.

[VISIT EVENT PAGE](#)

www.academicimpressions.com/front-line-fundraising-essentials-of-gift-solicitation



AGENDA

MONDAY, JANUARY 22, 2018

12:30 - 1:00 p.m.

Conference Registration

1:00 - 1:30 p.m.

Opening Comments and Introductions

1:30 - 2:45 p.m.

Preparing for Fundraising Success

This opening session will detail how to best plan your calls and visits through the following tactics:

- Matching a prospect's interests to your institution
- Engaging and involving the prospect
- Determining the proper ask amount, project type, and interest area
- Preparing for the ask with "the five Ws"

You will leave this session prepared to approach your prospect engagement strategies with a fresh perspective.

2:45 - 3:00 p.m.

Afternoon Break

3:00 - 4:30 p.m.

Making the Cold Call

The initial outreach you make on the phone will establish the tone for your ongoing interactions with your prospect, making it one of the most crucial points in the philanthropic process. This session will cover the following:

- What information you need to make a successful call
- Tips for securing an initial appointment, including moving through assistants
- Phone call scripting and planning your own calls

4:30 - 5:30 p.m.

Networking Reception (included in registration fee)

TUESDAY, JANUARY 23, 2018

8:30 - 9:00 a.m.

Continental Breakfast (included in registration fee)

9:00 - 10:30 a.m.

Making the Cold Call: Interactive Session

After learning the fundamentals of a successful call, you will apply the strategies outlined by role playing calls to donors. You will begin by highlighting what information is needed, potential roadblocks to reaching the prospect, and key points to make in the conversation. You'll role play both live calls and voicemail, and by the end of the session, you will feel more confident in calling each of your prospects.

10:30 - 10:45 a.m.

Morning Break



AGENDA

TUESDAY, JANUARY 23, 2018 (CONTINUED)

10:45 a.m. - 12:00 p.m.

Portfolio Management

Once you have mastered the cold call, you will learn how to identify top prospects from a sample portfolio using our expert facilitator's techniques. Just as critical as uncovering your top prospects, you will learn strategies to remove inactive leads from the portfolio to better focus your fundraising time and effort.

12:00 - 1:15 p.m.

Lunch (included in registration fee)

1:15 - 4:00 p.m. (break at 2:30 p.m.)

Making the Ask

Making a compelling ask and closing a solicitation are often the most daunting and stressful moments in the career of a fundraiser. The ask must be framed in a way that compels your donor to jump into action and support your institution. In this interactive session, you will practice the intricacies of making the ask. You will learn how to:

- Use the cultivation process to naturally build to the ask
- Create a conducive environment for a successful ask
- Script and role-play to move the process forward

WEDNESDAY, JANUARY 24, 2018

8:00 - 8:30 a.m.

Continental Breakfast (included in registration fee)

8:30 - 9:45 a.m.

Moves Management

Too often, development officers get stuck in the transitional pieces of the donor cycle—unable to smoothly move prospects through the cultivation, solicitation, and stewardship pieces, 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

9:45 - 10:00 a.m.

Morning Break

10:00 - 11:00 a.m.

Probing Questions for Your Moves Management Strategy

Once you have the foundation to create your moves management strategy, we will look at the right questions to ask and when to ask them. Knowing when your donor is ready to move to the next level is key in maintaining your portfolio and gift solicitation strategy, and will go a long way to help you effectively plan your calls and visits.



AGENDA

WEDNESDAY, JANUARY 24, 2018 (CONTINUED)

11:00 - 11:45 p.m.

Action Planning

In this final session, you will assess and synthesize the strategies and practices worked on over the previous two-days, outlining your key take-aways and new techniques that you will be able to implement. Using the skills developed in the previous sessions, you will also demonstrate your fundraising mastery by creating a cultivation and solicitation plan for your donor(s), workshopping your new approach with your colleagues, and gaining feedback from our expert facilitator.

11:45 a.m. - 12:00 p.m.

Closing Comments and Evaluations



INSTRUCTORS

Kathy Drucquer Duff, Founder, KDD Philanthropy

Kathy is an executive advancement officer with over twenty-three years of experience helping nonprofits and institutions transform the way they practice philanthropy. Kathy provides this prowess from her years of experience in higher education, where she created fundraising plans that have secured gifts of up to nine 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.



| 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

January 22 - 24, 2018 :: Orange County, CA

HOTEL

Hyatt Regency Orange County
11999 Harbor Blvd.
Garden Grove, CA 92840
714.750.1234

Please indicate that you are with the Academic Impressions group to receive the group rate.

Room Rate: \$209, plus applicable tax.

Room Block Dates: January 21, 22, and 23, 2018.

Rate Available Until: January 2, 2018. Rooms and rates are subject to hotel availability.



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.

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| CONFERENCE |
| Front-Line Fundraising: Essentials of Gift Solicitation |
| \$1,295 |

EARLY BIRD PRICING

Postmarked on or before January 5, 2018. For registrations postmarked after January 5, 2018, 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.