



CONFERENCE

# FRONTLINE FUNDRAISING: ESSENTIALS OF GIFT SOLICITATION

July 19 - 20, 2018

Chicago, IL





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*Practice and improve your solicitation skills as a frontline fundraiser.*

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## OVERVIEW

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This interactive conference is designed for those who need to quickly train staff tasked with frontline fundraising responsibilities, including gift officers, academic leaders, and/or volunteers, in order 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
- Provides a more strategic and successful approach to identifying prospects and cultivating donors
- Is highly practical and skills-based, and can get those new to philanthropy and frontline fundraisers up-to-speed fast

## GREAT FIT FOR ALL SKILL LEVELS

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This material is beneficial for both new and experienced frontline fundraisers, as well as 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, visits, asks, and portfolio management skills.

## LEARNING OUTCOME

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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/](http://www.academicimpressions.com/front-line-fundraising-essentials-of-gift-solicitation/)



## AGENDA

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### DAY 1: JULY 19, 2018

8:30 - 9:00 a.m.

#### **Conference Registration**

9:00 - 9:30 a.m.

#### **Opening Comments and Introductions**

9:30 - 10:45 a.m.

#### **Preparing for Fundraising Success**

We will detail how to best plan your calls and visits by utilizing 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 W's"

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

10:45 - 11:00 a.m.

#### **Morning Break**

11:00 a.m. - 12:30 p.m.

#### **Making the Initial Outreach and Managing Donor Visits**

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:

- 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
- Conversations that lead to productive visits

12:30 - 1:30 p.m.

#### **Lunch (included in registration fee)**

1:30 - 3:45 p.m.

#### **Making the Initial Outreach and Managing Donor Visits: 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.

3:45 - 4:00 p.m.

#### **Afternoon Break**

4:00 - 5:15 p.m.

#### **Portfolio Management**

Once you have mastered the cold call and understand how to lead productive visits, 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 gain strategies to remove inactive leads from the portfolio to better focus your fundraising time and effort.

5:15 - 6:15 p.m.

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



## AGENDA

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### DAY 2: JULY 19, 2018

8:30 - 9:00 a.m.

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

9:00 - 11:45 p.m. (includes morning break)

#### **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. 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

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

#### **Lunch**

12:45 - 2:00 p.m.

#### **Moves Management**

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

2:00 - 2:15 a.m.

#### **Afternoon Break**

2:15 - 2:45 p.m.

#### **Action Planning**

In this final half hour, you will assess and synthesize the strategies and practices worked on over the previous two-days, outlining your key takeaways and new techniques that you will be able to implement. Using the skills developed in this program, 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.

2:45 - 3:30 p.m.

#### **Final Q&A, Closing Comments, and Evaluations**



## INSTRUCTOR

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### **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		<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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July 19 - 20, 2018 :: Chicago, IL

### HOTEL

Hyatt Regency Chicago  
151 E. Wacker Dr.  
Chicago, IL 60601  
312.556.1234

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

**Room Rate:** \$229, plus applicable tax.

**Room Block Dates:** Nights of July 18 and 19, 2018.

**Rate Available Until:** June 27, 2018. Rooms and rates are subject to hotel availability.