



CONFERENCE

# **LEADERSHIP ANNUAL GIVING: KEY COMPONENTS OF A SUCCESSFUL PROGRAM**

August 6 - 7, 2018

New Orleans, LA





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*Strengthen your donor pipeline and build your mid-level giving program.*

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## OVERVIEW

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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 strategy. Through a combination of presentations and working sessions you will develop a plan to:

- Bolster your frontline effort
- Build sustainable mid-level giving
- Set and communicate with various giving levels
- Steward and cultivate leadership donors to become major donors

## LEARN PRACTICAL STRATEGIES YOU CAN USE

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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**

## WHO WILL BENEFIT FROM THIS WORKSHOP

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This conference is ideal for both new and seasoned advancement 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

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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/leadership-annual-giving-key-components-of-a-successful-program/](http://www.academicimpressions.com/leadership-annual-giving-key-components-of-a-successful-program/)



## AGENDA

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### DAY 1

8:00 - 8:30 a.m.

**Conference Registration and Breakfast (included in registration fee)**

8:30 - 9:00 a.m.

**Conference Opening and Introductions**

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**

During this hour, we 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 each donor 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 Processes**

To be an effective leadership annual giving officer, you must gain the skills in achieving and managing personal visits. First, we'll tackle 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**

3:15 - 5:15 p.m.

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

We will continue the afternoon by focusing on teaching the fundraising skills necessary to get visits, ensure visits are productive, and create a culture that promotes buy-in from these future major donors. There will be role play opportunities to put the content into practice.

5:15 - 6:15 p.m.

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



## AGENDA

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### DAY 2

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 offer a better understanding of the messages and vehicles you should use in addressing your different audiences. Particular attention will be paid to young alumni, social media, and making a compelling case for support.

10:00 - 10:15 a.m.

**Morning Break**

10:15 - 11:30 a.m.

**Stewarding Leadership Giving Donors**

Effective stewardship is essential in moving leadership 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 (included in registration fee)**

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? Here 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.

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. We will 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 long term plan for maximizing your program's effectiveness.

3:45 - 4:15 p.m.

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



## INSTRUCTORS

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**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).



| 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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August 6 - 7, 2018 :: New Orleans, LA

### HOTEL:

Hyatt Regency New Orleans  
601 Loyola Avenue  
New Orleans, LA 70113  
504.561.1234

**Room Rate:** \$179, plus applicable tax.

**Room Block Dates:** Nights of August 5 & 6, 2018.

**Rate available until:** July 16, 2018.

Please book early - rooms are limited and subject to availability.

**Reserve Your Room:** Call 602.252.1234 to make your hotel reservation. Please indicate that you are with the Academic Impressions group to receive the group rate.



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.

CONFERENCE

Leadership Annual Giving:  
Key Components of a  
Successful Program

\$1,495

### EARLY BIRD PRICING

Postmarked on or before July 20, 2018. For registrations postmarked after July 20, 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](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.