CONFERENCE

STRATEGIC PORTFOLIO MANAGEMENT FOR FUNDRAISING SUCCESS

November 15 - 16, 2018

Newport Beach, CA

Learn how to better manage your fundraising portfolios.

OVERVIEW

Whether you have a large portfolio that you are trying to prioritize, looking to clean up a portfolio that has not yielded results, or looking for strategies to better manage your time and processes, this conference will better equip you to develop your portfolio in an intentional way, as well as assist and motivate other members of your team. Join us to hear from experts in the areas of front-line fundraising, prospect management, and prospect research as they share their insights on sound portfolio management.

WHO SHOULD ATTEND

This conference will be beneficial for front-line fundraisers with a wide range of experience, but is not meant for beginners. Those who manage teams will leave with new tools to assist staff in using their portfolio as a tool for success. Prospect managers and researchers looking to gain useful strategies and tools to assist in portfolio and prospect management are encouraged to attend in teams with gift officers.

If you have questions about the content or its fit for you and your team, please reach out to Whitney Egstad.

LEARNING OUTCOME

After participating in this conference, you will be able to manage your portfolio for greater fundraising success.

VISIT EVENT PAGE

www.academicimpressions.com/strategic-portfolio-management-fundraising-success/

AGENDA

DAY 1

8:30 - 9:30 a.m.
Registration and Continental Breakfast (included in registration fee)

9:00 - 9:45 a.m.
Opening Comments and Introductions

9:45 - 10:45 a.m.
Understanding Prospect Lifecycles and Timelines
Having an understanding of prospect lifecycles and the timeline to cultivate a prospect is the first step to better guiding your portfolio. In this opening session, we will discuss the foundation of prospect management and learn about the current research and trends around portfolio and prospect management. We will also talk about the evolving relationship between frontline fundraisers and prospect research and management teams. Having this information will allow you to better inform and prepare your overall portfolio management strategy.

10:45 - 11:00 a.m.
Morning Break

11:00 a.m. - 2:00 p.m.
Moves Management (Lunch will be held during this session)
Too often, gift officers get stuck in donor transitions—unable to smoothly move prospects through cultivation, solicitation, and stewardship, 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:

- → A portfolio management worksheet to assist in ensuring that you are focusing on the most critical parts of your portfolio, while aligning your portfolio to your goals
- → 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 - 3:30 p.m.
Developing a Prospect and Donor Strategy
Here we will talk through how to build a strategy and timeline for your best donors and prospects. There will be time to work on plans for few of your current prospects.

3:30 - 3:45 p.m.
Afternoon Break

3:45 - 4:45 p.m.
Prospect Qualification
Here you will learn the key elements for qualification, review examples, and leave this session with the tools to scale your efforts no matter your database. Working and practice time to practice qualifying prospects is built into this session.

AGENDA

DAY 1 (CONTINUED)

4:45 - 5:15 p.m.
Routine Maintenance and Ongoing Portfolio Assessment
In this session, you will learn key strategies and tips for better prioritizing your time, gain strategies on developing a regular portfolio maintenance schedule and routine, and learn to set realistic goals for yourself. You will also be armed with the information necessary to make the case for downsizing and shrinking your portfolio, or keeping a smaller portfolio.

5:15 - 6:15 p.m.
Networking Reception (included in registration fee)

DAY 2

8:30 - 9:00 a.m.
Continental Breakfast (included in registration fee)

9:00 - 10:00 a.m.
Working Effectively with Prospect Research and Prospect Management
Prospect research and prospect management teams can be best partners in organizing your portfolio and managing your leads. No matter how your shop is structured, you will learn strategies for scheduling check-ins and meetings, as well as how to best align goals and expectations. Even if you do most of your research independently, you will learn the principles of prospect research strategy to help guide your efforts.

10:00 - 10:15 a.m.
Morning Break

10:15 - 11:15 a.m.
Aligning Performance Metrics to Meet Goals
In this session, we will describe how to align your key performance metrics with institutional and shop metrics. You will leave this session with a clear understanding of how to incorporate performance metrics to your overall portfolio strategy and success as a fundraiser.

11:15-11:45 a.m.
Tying it Together: Portfolio Working Time

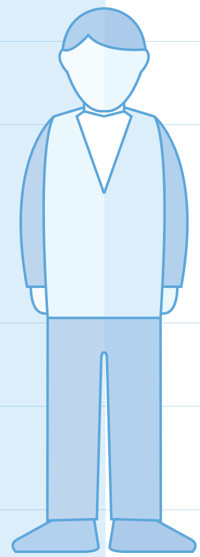
11:45 a.m. - 12:15 p.m.
Final Q&A and Evaluations

INSTRUCTORS

Kathy Drucquer Duff, Founder and President, 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 • 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 recomend 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

November 15 - 16, 2018 :: Newport Beach, CA

HOTEL:

Renaissance Newport Beach
4500 MacArthur Blvd
Newport Beach, CA 92660
949.476.2001

Room Rate: $189 + tax

Room Block Dates: The nights of November 14 and 15, 2018.

Rate Available Until: October 24, 2018.

Reserve Your Room: Please call 949.476.2001 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.