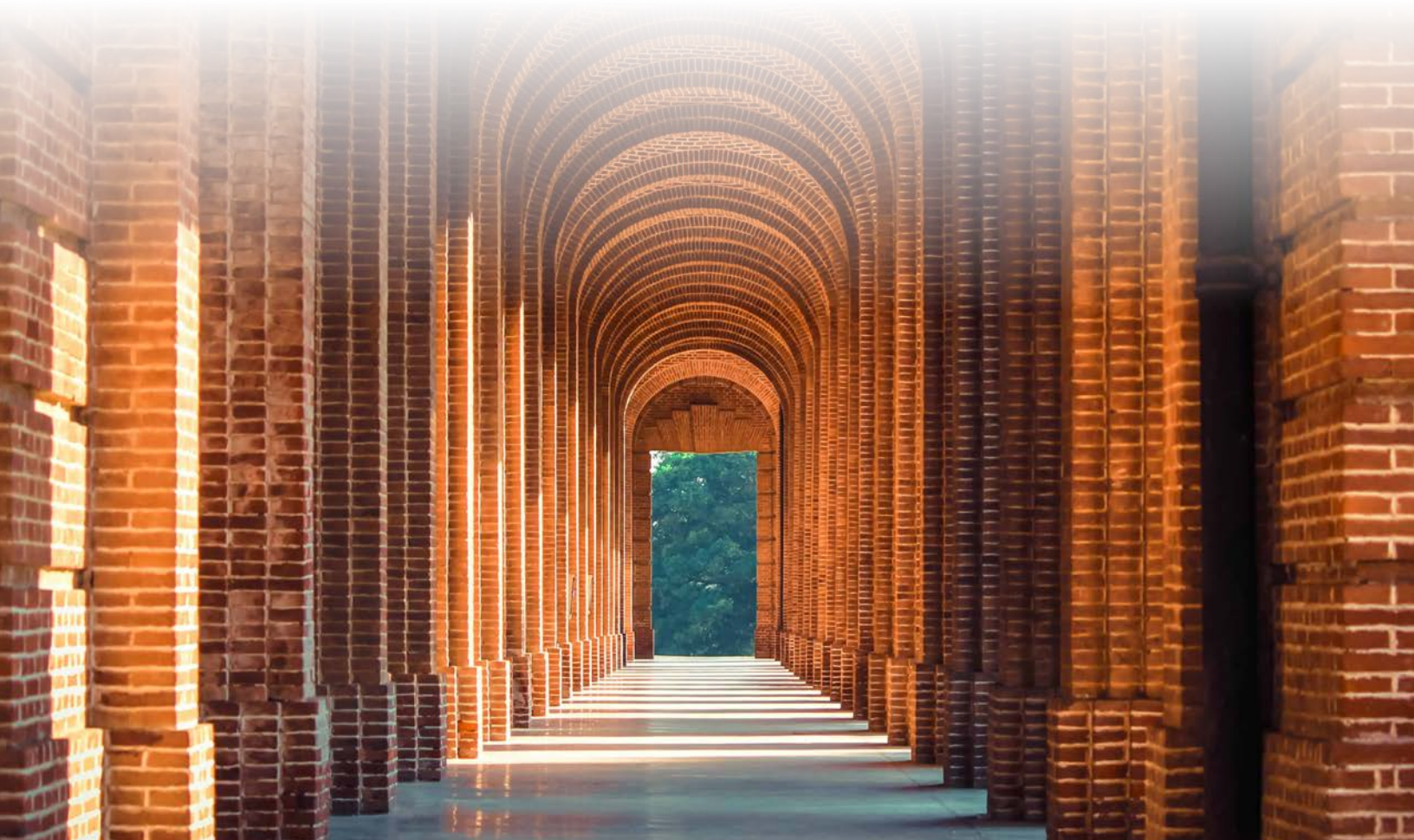


A COMPREHENSIVE APPROACH TO MODERN CAMPAIGNS

February 6 - 8, 2019 | Orlando, FL



Learn critical skills for resourcing, improving engagement, and overcoming campaign challenges.

OVERVIEW

As campaigns become quicker, more agile, and less structured, advancement professionals are finding the need to be more intentional and targeted in their goals, strategies, and approaches. Whether you are in a leadership role, working in frontline fundraising, or involved in stewardship, events, or communications, you will learn in-depth strategies and solutions to these major issues and more:

- How to effectively staff and resource your shop
- How gift officers should strategize their cultivation, partnerships, and asks
- What it takes to create an effective campaign communications strategy
- Running and managing effective volunteer programs and committees
- What campaign events you should be hosting and how to measure the ROI

POST-CONFERENCE WORKSHOP: COMMUNICATION TOOLS, PUBLICATIONS, AND MARKETING STRATEGIES

This interactive workshop will focus on the communication tools and publications that can boost the visibility and messaging of your campaign, and how you can incorporate video and other experiential components. Our expert instructor will show you examples of effective communications, review your campaign materials, and provide feedback to help you develop more compelling messages for your donors. You will leave this session equipped with tools to assess and continuously improve your own campaign materials when you return to campus.

WHO SHOULD ATTEND

Advancement leadership, campaign managers, frontline fundraisers, donor relations, and communications professionals who are involved in campaign planning, strategy, and management will benefit most from this conference. Teams are highly encouraged to attend to get the full benefit of the breakout sessions.

AGENDA

Day 1 | February 6, 2019

12:30 - 1:00 p.m.

Registration for Main Conference Attendees

1:00 - 1:30 p.m.

Opening Comments and Introductions

1:30 - 2:30 p.m.

The Future of Campaigns, Current Obstacles, and Trends

Where does the comprehensive campaign fit into the future of higher education fundraising? What is the future of the feasibility study? How are institutions using outside counsel and consultants? This session shall address common obstacles and discuss the current trends and thinking around campaign planning.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 4:00 p.m.

Staffing, Training, and Supporting the Frontline in Campaign

Running a campaign takes a strategic blend of resources. In this program, the instructor will provide practical tips for staffing, training, and supporting your frontline fundraisers. While working through an activity on organizing a training development program, you'll acquire the tactics and strategies necessary to bring on new fundraising staff.

4:00 - 5:30 p.m.

Resourcing, Database, and Back-Shop Support

Now that you've figured out how to staff the frontline, it is important to resource the rest of your shop accordingly. You will also need to know the state of your database, and how best to support your database managers. Working through an exhaustive checklist for staff, infrastructure, and budgetary resources, you will gain an understanding of what you need to fully resource your campaign.

5:30 - 6:30 p.m.

Networking Reception (included in registration fee)

AGENDA

Day 2 | February 7, 2019

8:00 - 8:30 a.m.

Continental Breakfast (included in registration fee)

8:30 - 10:00 a.m.

Aligning Donor Interests and Developing a Long-Term Solicitation Strategy

You spend months, even years, identifying and articulating campaign priorities with internal stakeholders, yet your top donors have interests in funding projects that lie outside of the official scope of the campaign. Our speakers will share insights on navigating the details of closing a gift, aligning internal and external priorities, and ensuring dollars are being allocated appropriately without compromising campaign (or prospect) priorities.

10:00 - 10:15 a.m.

Morning Break

10:15 - 11:45 a.m.

Internal and External Campaign Resources

Explore the different ways you can create teams to manage your campaign and initiatives, and what roles you should permanently staff. For some institutions, it might be beneficial to work with outside counsel and vendors, but what does that entail? Others might be looking to rely entirely on their in-house staff, but what should the strategy involve? This program will help you understand the options available and allow you to determine what will work best for your shop and your situation.

11:45 a.m. - 1:00 p.m.

Lunch (included in registration fee)

1:00 - 2:30 p.m.

Donor Relations and Communications in Campaign

Knowing which stewardship activities and outreach are most appropriate and effective are critical in retaining your donors, especially during a sustained campaign period. This session will help you build a donor relations focus into your campaign plans and communications strategies. You will see examples of campaign case statements and how to better receipt your gifts, as well as, how to create and distribute acknowledgements. We will conclude with a shop-wide audit activity that you will be able to take back to your campus.

2:30 - 2:45 p.m.

Afternoon Break

2:45 - 4:00 p.m.

Effectively Working with Campaign Volunteers and Committees

Volunteers can be a great resource if managed and organized in an effective, structured, and intentional way. You will learn how to structure helpful volunteer programs and committees. You will also learn what goes into developing volunteer relationships and using their skills and talents in a way that not only makes them an asset to your campaign but also future donors and advocates, if they aren't already.

AGENDA

Day 2 (CONTINUED)

4:00 - 4:30 p.m.

Day Two Debrief

During this final session, we will have time to cover any outstanding questions or topics from today's sessions. This is your opportunity to ask questions and drive the direction of the session.

Day 3 | February 8, 2019

8:00 - 8:30 a.m.

Continental Breakfast (included in registration fee)

8:30 - 10:00 a.m.

Successful Campaign Events

During your campaign, there are a number of purposeful events that you should consider to better engage donors with their philanthropy. Learn strategies on how to best position your president and leading advocates and how to effectively involve students and alumni. Our instructors will help you determine how many events should be launched annually and identify the metrics that will help you prove each event's success.

10:00 - 10:15 a.m.

Morning Break

10:15 - 11:30 a.m.

Campaign Problem Solving: Planning for and Managing the Unexpected

It's impossible to predict the unexpected that may occur during a campaign, such as the stepping down of a President, the loss of an AVP of Advancement, or a PR issue that threatens relationships with donors and prospects. Budgetary, staffing, and donor support issues may also arise mid-campaign and threaten to derail your progress. However, this is not the time to panic; this is the time to reassess, realign, and restructure in the direction of success. Utilizing some sample scenarios, we will give you the tools and tactics to remain successful in your campaign efforts.

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

Closing Comments and Evaluations

AGENDA

Day 3 (CONTINUED)

Post-Conference Workshop: Communication Tools, Publications, and Marketing Strategies

12:00 - 1:00 p.m.

Lunch for Post-Conference Attendees (included in workshop registration fee)

1:00 - 4:00 p.m.

Post-Conference Workshop: Communication Tools, Publications, and Marketing Strategies

This interactive workshop will focus on the communication tools and publications that can boost the visibility and messaging of your campaign, as well as how you can incorporate video and other experiential components. Our expert instructor will show you examples of effective communications, review your campaign materials, and provide feedback to help you develop more compelling messages for your donors. You will then complete a campaign communications audit and work to draft more effective communications pieces for the future. You will leave this workshop equipped with tools to assess and continuously improve your own campaign materials when you return to campus.

INSTRUCTORS

Dexter Bailey

Senior Vice President for Advancement; Executive Director of the Stony Brook Foundation, Stony Brook University

Dexter A. Bailey Jr. is a fundraising executive with over 25 years of experience building successful programs at both public and private universities including Worcester Polytechnic Institute, UC Berkeley, University of Washington, Ohio University, and now at Stony Brook University. During his career, he has been directly involved in raising over \$700 million. He is also the executive director of the Stony Brook Foundation, a private 501(c) (3) with \$500 million in total assets.

His expertise includes reengineering comprehensive fundraising programs, complex principal gift strategy development, alumni relations, staffing development and comprehensive campaign implementation. Dexter is often invited to speak around the country on issues related to leadership in advancement, principal gifts strategies and the role and experience of minorities in university advancement.

As senior vice president of advancement at Stony Brook University, his fundraising responsibilities encompass Stony Brook University, Stony Brook University Hospital, Stony Brook Children's Hospital and the campuses in Southampton, New York; Turkana Basin Institute, Kenya; SUNY Korea; and Centre ValBio, Madagascar.

Since Dexter arrived in 2011, Stony Brook has launched a \$600 million campaign that is unprecedented in the State University of New York (SUNY) system. To date, the campaign has generated more than \$468 million, including a historic \$150 million lead commitment. In 2014, the Council for Advancement and Support of Education recognized Stony Brook's fundraising program for "Overall Performance" and "Overall Improvement" among peer public research universities.

Dexter earned a BS in journalism from the E.W. Scripps School of Journalism at Ohio University and an MBA from the University of Toledo.

Angela Marie Joens

Assistance Vice Chancellor of Development Outreach, University of California Davis

Angela has extensive management, development and stewardship experience. In her current role she supervises annual giving, donor relations, research and prospect management, proposal services, marketing and communications, and development recruitment.

Prior to UC Davis, Joens was Vice President of Development Operations for the Mercy Medical Center Foundation in Des Moines, Iowa. She also served as the Senior Director of Donor Relations for the Iowa State University Foundation and worked for RuffaloCODY a for-profit company that assists the non-profits with fundraising. Her career began as a fundraiser for the American Cancer Society.

Joens is also a non-profit consultant, an executive coach, and speaks nationally on topics related to stewardship, development and leadership. She has been featured in several industry publications including CASE Currents Magazine and the Chronicle of Philanthropy. Joens earned her BA from the University of Iowa, her MPA from Iowa State University, and her Professional Life and Work Coach Certificate from UC Davis. She is a proud volunteer for the Association of Donor Relations Professionals (ADRP) and the Council for the Advancement and Support of Education (CASE).

INSTRUCTORS

Ashlyn W. Sowell

Senior Director, Associate Vice President for Campaign Operations and Engagement, Johns Hopkins Medicine

Ashlyn W. Sowell has enjoyed a career in development for over twenty years. She is the Senior Director of Development for The Fund For Johns Hopkins Medicine. Ashlyn's first position was as Director of Development for The Children's House at Johns Hopkins and The Grant-A-Wish Foundation (now known as Believe in Tomorrow). From there she moved to her alma mater, Duke University, serving as Annual Fund Director at The Fuqua School of Business and a Major Gift Officer at the Medical Center, during Duke's \$2 billion campaign. In 2006, Ashlyn joined the development staff at Gettysburg College where she held several key positions. As Associate Vice President for Development & Campaign Director, Ashlyn led the planning, leadership and public phases of Gettysburg's \$150 million campaign, working closely with the president and board of trustees. Her move back to Johns Hopkins in 2015 took her career full circle back to working in health care with grateful patients. She is an active speaker and writer in the field and loves to mentor newcomers to development.

Lynne Wester

Donor Relations Guru

Lynne is a frequent conference speaker and a well-known resource for donor relations and fundraising. She has been featured in *The Washington Post*, *CURRENTS* magazine, *The Chronicle of Philanthropy* and other industry publications. Lynne also created the website and blog where she shares her expertise, opinions, and collections of samples on a variety of topics to the greater development world and hosts a monthly webinar series.

Using her hands-on approach, Lynne works with many organizations to help them keep their focus donor driven, technology savvy, strategic, and always with a splash of good humor. She received her undergraduate degrees from the University of South Carolina and is a loyal gamecock alumna, donor, and fan, and holds a master's in strategic fundraising and philanthropy with an emphasis in higher education.

LOCATION

February 6 - 8, 2019 | Orlando, FL

Hotel:

Rosen Shingle Creek
9939 Universal Blvd
Orlando, FL 32819
866-996-9939

Room rate:

\$199 + tax

Room block dates:

The nights of February 5, 6, and 7, 2019.

Room block cutoff date:

January 15, 2019.

Reserve Your Room: Please call 866-996-9939 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.

The Academic Impressions Experience



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Highly recommended:
9 out of 10 participants recommend our trainings to colleagues