

# YOUNG ALUMNI: ESTABLISHING LIFELONG RELATIONSHIPS

February 11 - 13, 2019 | Denver, CO



## *Build upon your connection with alumni that began when they were students.*

### OVERVIEW

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Learn how you can develop intentional young alumni programming that seamlessly integrates your on-campus and after-graduation efforts. This event is a must if your institution wants to establish strong, lifelong relationships with its newest alumni. Join a faculty, who have a track record of engaging and inspiring young alumni, for three days of practical content focused on:

- Cultivating a culture of philanthropy on campus
- Transitioning students to alumni
- Effective events
- Volunteer management
- Giving programs

You will leave this conference with a complete gap analysis assessing the current state of your young alumni programming, a toolkit of new ideas, and an action plan to move forward.

### WHO SHOULD ATTEND

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Advancement professionals who work with young alumni, especially professionals in alumni relations and annual giving, will gain a comprehensive plan for better engaging young alumni. Teams from giving and alumni relations are encouraged to attend.

### A NOTE FROM OUR PROGRAM MANAGER

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Engaging young alumni is essential to long term alumni engagement and giving effort and we've repositioned this conference to reflect the changing needs and challenges that this work presents us with. Some updates for this year include: an increased focus on student philanthropy efforts, the importance of engaging students while still on campus, how to maximize the impact of multi-channel giving efforts, and digital engagement strategies. You'll have substantial time to network/form connections with your peers from across higher ed who are engaged in the same work you are.

### POST-CONFERENCE WORKSHOP: UNDERREPRESENTED ALUMNI ENGAGEMENT

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As student demographics rapidly shift across North America, understanding how to engage a diverse alumni population is becoming more important than ever.

Join us to learn how to develop and implement effective diverse alumni engagement programming.

# AGENDA

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## **Day 1: February 11, 2019**

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

8:30 - 9:00 a.m.

### **Conference Introduction and Opening Remarks**

9:00 - 9:15 a.m.

### **The Student Philanthropy Model**

9:15 - 10:30 a.m.

A successful young alumni program depends upon cultivating a spirit of philanthropy while students are still on campus. We will walk you through our student philanthropy model and its three core components: awareness, gratitude, and giving.

### **Morning Break**

10:30 - 10:45 a.m.

### **Generational Values Activity**

10:45 - 11:30 a.m.

To understand how to communicate with students and alumni, you must understand how their values differ across time. In this session, you will participate in an activity that will demonstrate the living generations' values and will conclude with how messaging should adapt based on their unique values.

### **Student Philanthropy Programming**

11:30 a.m. - 1:00 p.m.

Now that you understand the student philanthropy model, we will walk through the student lifecycle, identifying where you can cultivate awareness, gratitude, and giving. You'll then examine best practices for transitioning your students to alumni through effective volunteer, event, and philanthropic opportunities.

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

1:00 - 2:00 p.m.

### **Capitalizing on Student Volunteers**

2:00 - 3:30 p.m.

Here we'll talk through UPenn and TCU's "super" volunteer programs that train students starting as early as their first year on campus and call on them throughout their young alumni years. Through these alumni ambassador programs, highly trained students are given significant leadership and solicitation training and used for planning events, admissions panels, social media ambassadors, etc. Our faculty will explain how to integrate such a program into your efforts and leverage existing campus leadership and governance programs—expanding on your transition efforts and strengthening your volunteer program.

### **Afternoon Break**

3:30 - 3:45 p.m.

# AGENDA

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## **Day 1 (CONTINUED)**

### **Gap Analysis**

*3:45 - 4:15 p.m.*

What are you already doing to cultivate awareness, gratitude, and giving? In this working session, you'll take a careful look at your current programming and gather in small groups to identify where you promote these three components. This activity will allow you to see which areas need bolstering. You'll use this analysis to ensure that your focus during this conference is directed toward the right areas for your institution.

### **Understanding Transition: Ensuring Engaged Students Become Engaged Young Alumni**

*4:15 - 5:15 p.m.*

You've worked hard at engaging your students, providing opportunities for them to increase their involvement, and educating them on the importance of giving back. However, if you haven't considered the magnitude of the student-to-alumni transition, you will likely lose your already loyal representatives. During this hour, you will gain a better understanding of the current generation and learn how to best communicate with them during this period of transition.

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

*5:15 - 6:15 p.m.*

## **Day 2: February 12, 2019**

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

*8:30 - 9:00 a.m.*

### **Developing Multi-Channel Giving Strategies for Young Alumni**

*9:00 - 11:00 a.m.*

Do you offer giving opportunities that are attractive to young alumni? This time will be spent helping you understand different giving strategies that can be implemented at your institution to better promote young alumni giving. The session will cover online, mail, and phone initiatives as well as a discussion on whether your effort should gravitate toward restricted or unrestricted giving options.

### **Morning Break**

*11:00 - 11:15 a.m.*

### **Creating Events Targeted at Recent Alumni**

*11:15 a.m. - 12:15 p.m.*

How do you move beyond happy hours and sporting events to engage young alumni? In this session, you'll examine how to design creative events that will attract young alumni. You'll consider different programming options aimed at graduates in the first five years compared to those in the first decade. You'll also explore examples of successful events for these different life stages. The hour will conclude by looking at the relationship between these events and the institution and exploring ways to measure their effectiveness.

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

*12:15 - 1:15 p.m.*

# AGENDA

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## **Day 2 (CONTINUED)**

### **Digital Young Alumni Engagement**

1:15 - 2:45 p.m.

Now that we've covered in-person events and programming, we turn to all things digital to complement your efforts. We will cover email, web, social media, crowdfunding, and digital ambassadors.

### **Afternoon Break**

2:45 - 3:00 p.m.

### **Young Alumni Feedback and Assessment**

3:00 - 4:00 p.m.

This hour will begin with content on how to ensure you are incorporating young alumni feedback into your programming and will examine best practices in gathering that information. We'll examine how to assess your current efforts, including with programming and with volunteers, to understand how and when to change course.

### **Day 2 Questions and Answers**

4:00 - 4:15 p.m.

## **Day 3: February 13, 2019**

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

8:30 - 9:00 a.m.

### **Gaining Buy-In across Campus for Young Alumni Initiatives**

9:00 - 10:00 a.m.

Young alumni are the next generation of leaders and will be a source of support for your institution in years to come, so putting resources toward cultivating them will pay dividends. How do you make this case for long-term return during a time when many shops are focused on short-term gains? We will help you make the case for a comprehensive young alumni program, build a reasonable budget while you are gaining buy-in, and recruit cross-campus allies to your cause.

### **Morning Break**

10:00 - 10:15 a.m.

### **Troubleshooting Your Challenges**

10:15 - 11:00 a.m.

As our time comes to a close, we'll break out by institution size and type to allow more specialized time with the faculty and other attendees in similar contexts. You will have time to talk through your biggest challenges and gather feedback from the faculty and your peers.

## AGENDA

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### ***Day 3 (CONTINUED)***

#### **Putting It All Together**

*11:00 - 11:30 a.m.*

In this session, you will revisit the core components needed to build a lifelong relationship with your recent alumni. Then, using your findings from the gap analysis session, you will create an initial plan for additional programming you want to implement or changes you'd like to make at your institution.

#### **Open Forum with Faculty, Identifying Key Takeaways, Closing Q&A, and Evaluation**

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

### ***Post-Conference Workshop: Underrepresented Alumni Engagement***

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

*12:00 - 1:00 p.m.*

#### **Post-Conference Workshop: Underrepresented Alumni Engagement**

*1:00 - 4:00 p.m.*

As student demographics rapidly shift across North America, understanding how to engage a diverse alumni population is becoming more important than ever.

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## INSTRUCTORS

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### **Elise M. Betz**

**Executive Director, Alumni Relations, University of Pennsylvania**

Elise began her tenure at Penn with the annual fund and currently manages a majority of the institution's alumni relations efforts, including communications, alumni education, the multicultural alliance, and alumni travel. She also founded and manages "Penn Traditions: Building Our Community," Penn's own comprehensive student advancement program, the first of its kind in the country. Elise's work in this area helped increase senior gift participation from 18% in 2001 to over 72% in 2011 and earned her a Penn Models of Excellence Award. She presents at advancement conferences across the country and has consulted with numerous institutions interested in starting student advancement programs around the world.

### **Harmonie Farrow**

**Director, Loyalty Giving Programs, Texas Christian University**

Harmonie joined the Office of Loyalty Giving at TCU in 2010 as the director of student and young alumni programs. In her current role, she oversees phonathon, student and young alumni philanthropy and digital philanthropy efforts. While at TCU, Harmonie developed and implemented the University's first online day of giving, TCU Gives Day, and the Count Me In! student philanthropy program, a 2014 CASE gold award winner for both Annual Giving Programs and Best Practices in Fundraising. Harmonie presents nationally and internationally at conferences about student and young alumni engagement, especially as it pertains to philanthropic giving, volunteer management, gaining institutional buy-in and maximizing budgets. Prior to joining TCU, Harmonie served as a donor relations officer at Cornell University.

### **John Tatum Grice**

**Director, Annual Giving, University of Wisconsin Foundation**

John began his career in philanthropy as a student foundation member at Kansas State University, serving within the K-State Proud Student Campaign. This experience jump-started his passion for higher education philanthropy. Following graduation, he began his tenure in KSU Foundation's Annual Giving department, focused on direct mail, phonathon, student philanthropy and student life fundraising. In April of 2014, he accepted a role at the Oklahoma State University Foundation focused on next generation philanthropy focused on engaging students, young alumni, and donors in all seasons of life through crowdfunding, days of giving, and peer-to-peer strategies. Currently, John leads the University of Wisconsin-Madison annual giving team.

## LOCATION

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**February 11 - 13, 2019 | Denver, CO**

**Hotel:**

JW Marriott Cherry Creek  
150 Clayton Lane  
Denver, CO 80206  
303.316.2700

**Room rate:**

\$199 + tax

**Room block dates:**

The nights of February 10, 11 and 12, 2019

**Room block cutoff date:**

January 21, 2019.

Reserve Your Room: Please call 303.316.2700 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.

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