

INSTITUTE FOR ANNUAL GIVING

January 16 - 18, 2019 | San Diego, CA



Strategically plan for your annual giving program.

OVERVIEW

Many annual giving shops struggle with stagnant or underperforming annual giving programs - we've put together a program to help you breathe new life into your efforts. We invite you to join us for a three-day conference that will showcase the most successful tactics in annual giving and help you develop a comprehensive plan to improve your shop's efforts.

Through a unique blend of learning and activity, our expert faculty will share key strategies that underpin the strongest annual giving programs and provide innovative solutions to your most difficult challenges. We'll cover the most effective solicitations, channel integration, and segmentation. This conference will encourage you to group with like institutions to make the most of your sessions, and you will have the opportunity to browse the best solicitations submitted by our faculty and your peers.

PRE-CONFERENCE WORKSHOP: ANNUAL GIVING PRIMER

We welcome newcomers to the field to join us as we walk through the fundamentals of a successful annual giving program, including a thorough overview of the standard solicitation channels.

POST-CONFERENCE WORKSHOP: FRONT-LINE FUNDRAISING FOR LEADERSHIP ANNUAL GIVING

Annual giving programs are seeing a greater reliance on relationship-based fundraising. This workshop will teach you the front-line skills necessary to ramp up your front-line effort, including:

- Planning calls based on prospect data, anchor appointments, and budget pressures
- Tips for securing an initial appointment, including moving through gatekeepers
- How to use the cultivation process to naturally build to the ask
- The pros and cons of using a proposal or white paper during your solicitation process
- Creating a conducive environment for a successful ask
- Role-playing difficult scenarios

WHO SHOULD ATTEND

This event is ideal for annual giving managers, directors, and their team members. This conference assumes a general level of annual giving knowledge. Newcomers to fundraising are encouraged to add the Annual Giving Primer workshop to their experience.

AGENDA

Wednesday, January 16, 2019

Pre-Conference Workshop: Annual Giving Primer

Pre-Conference Workshop: Annual Giving Primer

8:30 a.m. to 12:30 p.m.

Your registration for this workshop includes materials, access to the workshop, breakfast, and lunch on Wednesday.

Registration and Continental Breakfast (included in workshop registration fee)

8:30 - 9:00 a.m.

Pre-Conference Workshop: Annual Giving Primer

9:00 - 11:45 a.m.

We welcome newcomers to the field to join us as we walk through the fundamentals of a successful annual giving program, including a thorough overview of the standard solicitation channels.

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

11:45 a.m. - 12:30 p.m.

Day One

Your registration for the main conference includes access to all sessions below and materials, access to the networking reception on Wednesday, breakfast and lunch on Thursday, and breakfast on Friday, as well as refreshments and snacks throughout the conference.

Main Conference Registration

12:00 - 12:30 p.m.

Welcome and Opening Remarks

12:30 - 1:30 p.m.

Landscape of Annual Giving

1:30 - 2:45 p.m.

Setting the stage for the conference, this session will provide context for the annual giving landscape as it stands currently, including giving trends and donor behavior.

Afternoon Break

2:45 - 3:00 p.m.

AGENDA

Day 1 (CONTINUED)

Data Driven Strategy

3:00 - 4:00 p.m.

Now more than ever, shops rely on data analysis to benchmark, strategize, and move the needle. This session will take a deep dive into retention, reactivation, and acquisition rates, and give you a sense of how your shop compares against recent trends and reports.

Building Your Village: How to Develop and Leverage Key Partnerships

4:00 - 5:15 p.m.

Partnerships are crucial to your annual giving program's success. In this session, we will learn about key connections your shop should form, how to create mutually beneficial collaborations, and how to leverage these partners to achieve your annual giving goals.

Networking Reception (included in registration fee)

5:15 - 6:15 p.m.

Thursday, January 17, 2019

Day Two

Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Leveraging Annual Giving Communications to Deploy Key Messages

8:30 - 9:45 a.m.

In this session, we will demonstrate how to make your annual giving program an intentional communication tool. Learn how to reinforce key messages, leverage your voice, and position your shop for future resources and support.

Morning Break

9:45 - 10:00 a.m.

Digital Solicitations: Effective Fundraising in a New Era

10:00 - 11:15 a.m.

Most institutions are leveraging digital media for solicitations, but some of us are finding that the most innovative solicitations are not always those that inspire the most giving. In this session, we will cover the most productive digital strategies that bring in dollars and can be used for long-term engagement.

Crowdfunding and Micro Campaigns

11:15 a.m. - 12:30 p.m.

This session will cover best practices of crowdfunding and micro-campaigns and how to best integrate these modern fundraising tools into your overall strategy.

AGENDA

Day 2 (CONTINUED)

Lunch (included in registration fee)

12:30 a.m. - 1:30 p.m.

Days of Giving

1:30 - 2:30 p.m.

What strategies create maximum impact on giving days? Learn how to strategically plan a day that will account for all the necessary resources and essential partners. We'll discuss how to harness urgency, apply innovative techniques, and follow best practices to unite and engage your donors in 24 hours of fast-paced and successful philanthropy.

Afternoon Break

2:30 - 2:45 p.m.

The Future of Phonathons: A Facilitated Discussion

2:45 - 3:45 p.m.

Are you thinking about abandoning your phonathon? As contact rates continue to decline, we are striving to leverage our calling programs in more strategic ways. Are you adjusting your scripts by segment and planning your calls in tandem with solicitation schedules? Are you using your call space to build partnerships on campus? Join us for a facilitated discussion on the future of phonathons led by our expert faculty.

Gallery of Solicitations

3:45 - 4:45 p.m.

Before the conference, we'll ask you to send us your best solicitations. During this session, you will be able to network and gather new ideas as you browse a gallery of your peers' solicitations.

Friday, January 18, 2019

Day 3

Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Key Metrics to Track Progress and Report to Leadership

8:30 - 9:30 a.m.

Measuring for success is an essential component within our industry. Capitalize on data driven strategy and learn how to incorporate key metrics that will afford opportunities for course corrections, strategic decision making, and influential reporting to leadership.

Morning Break

9:30 - 9:45 a.m.

AGENDA

Day 3 (CONTINUED)

Annual Giving Stewardship

9:45 - 10:45 a.m.

Stewarding annual fund donors is notoriously difficult but vital for retention of this population. This session will show you how to use existing resources and opportunities to maximize your time and budget.

Working Session

10:45 - 11:15 a.m.

Using a provided template, you will now have time to put together your preliminary strategy to take action once returning to campus.

Final Wrap-Up, Faculty Q&A Panel, and Program Evaluation

11:15 a.m. - 12:00 p.m.

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

12:00 - 1:00 p.m.

Post-Conference Workshop: Front-Line Fundraising for Leadership Annual Giving

1:00 - 4:00 p.m.

Annual giving programs are seeing a greater reliance on relationship-based fundraising. This workshop will teach you the front-line skills necessary to ramp up your front-line effort, including:

- Planning calls based on prospect data, anchor appointments, and budget pressures
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INSTRUCTORS

Brian Dougherty

Senior Vice President and 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).

Dan Frezza

Associate Vice President for Lifetime Philanthropic Engagement & Annual at William & Mary

In his current role, Dan Frezza oversees the strategic leadership and execution of a comprehensive annual giving approach that includes fundraising priorities for 13 school and units. William & Mary boasts the highest undergraduate alumni participation rate among the public ivy universities and leads all top 50 nationally ranked USNWR public universities as well. Under his leadership, Dan has successfully positioned annual giving and participation as key campaign goals in a \$1 billion comprehensive campaign. During his five year tenure William & Mary has grown from 23% participation in 2012 to 29.9% in 2017.

Dan has more than 14 years of higher education experience, ranging from student affairs, alumni engagement and annual giving. He received his bachelor's degree in communications and marketing from Western Carolina University and his master's degree in higher education administration from North Carolina State University.

Molly Robbins

Director, Institutional Advancement, Gladwyne Montessori School

Molly oversees the design and execution of a comprehensive annual giving strategy. She has over a decade of experience working with leadership giving programs, Telefund, volunteer programs, direct marketing, social media, and events. In addition to her work in the office, she also launched the Philadelphia Annual Giving Workshop Series through a CASE Venture Capital Grant. She holds a Masters in Organizational Leadership and Development from Saint Joseph's University and a Bachelors in Political Science from the University of Pittsburgh.

INSTRUCTORS

Melissa Rowan

Assistant Vice President, Strategic Initiatives, Iowa State University

Melissa oversees an annual giving operation that raises more than \$5 million on an annual basis. She also serves as the development liaison for Reiman Gardens, the University's botanical gardens; the Iowa State Center, the university's performing arts center; and the university's honors program.

Additionally, she staffs Iowa State's nationally recognized women and philanthropy program. Melissa also works as a consultant for Campbell & Co., Melissa provides annual giving and membership council for higher education, service based, and cultural institutions. In this role, she seeks to help the programs she is working with enhance their fundraising capabilities with traditional annual giving strategies and cutting edge ideas. Melissa has participated as a conference chair and faculty member at several CASE (Council for the Advancement and Support of Education) and other higher education annual giving conferences in addition to speaking at national conferences for organizations such as the League of American Orchestras and Volunteers of America.

Melissa graduated from Iowa State University with a bachelor's degree in history and Florida State University with a master's degree in public administration with an emphasis in nonprofit management.

LOCATION

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Hotel:

San Diego Marriott
8757 Rio San Diego Drive
San Diego, CA 92108
619.692.3800

Room rate:

\$169 + tax

Room block dates:

The nights of January 15, 16 and 17, 2019.

Room block cutoff date:

December 15, 2018.

Reserve Your Room: Please call 619.692.3800 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



Intimate, workshop-style trainings with personalized attention



Trainings are practical and action oriented so you can hit the ground running



Carefully-vetted expert instructors who are also practitioners in the field



Learner-centric and designed for interaction and collaboration



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