

LEADERSHIP ANNUAL GIVING: KEY COMPONENTS OF A SUCCESSFUL PROGRAM

August 5 - 6, 2019 | Baltimore, MD



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

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

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

This course 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.

Bring your team and save!

Save over 15% when you register three or more colleagues.

AGENDA

Day 1 | August 5, 2019

Conference Registration and Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Conference Opening and Introductions

8:30 - 9:00 a.m.

Aligning Leadership Annual Giving with Your Goals and Mission

9:00 - 9:30 a.m.

A leadership annual giving program will not succeed unless it's 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.

Assessing and Resetting Your Leadership Levels

9:30 - 10:30 a.m.

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.

Morning Break

10:30 - 10:45 a.m.

Working Session: Assessing and Resetting Your Leadership Levels

10:45 - 11:15 a.m.

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.

Building Your Leadership Pipeline

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

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.

Lunch (included in registration fee)

12:30 - 1:30 p.m.

Frontline Fundraising: Goals and Metrics, Tactics and Processes

1:30 - 3:00 p.m.

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.

AGENDA

Day 1 | (CONTINUED)

Afternoon Break

3:00 - 3:15 p.m.

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

3:15 - 5:15 p.m.

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.

Networking Reception (included in registration fee)

5:15 - 6:15 p.m.

Day 2 | August 6, 2019

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Communicating the Purpose and Impact of Your Leadership Annual Giving Program

9:00 - 10:00 a.m.

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.

Morning Break

10:00 - 10:15 a.m.

Stewarding Leadership Giving Donors

10:15 - 11:30 a.m.

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.

Integrating Leadership Giving Donors with Major Giving

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

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.

Lunch (included in registration fee)

12:30 - 1:30 p.m.

AGENDA

Day 2 | (CONTINUED)

Building Buy-In for Your Effort

1:30 - 2:30 p.m.

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.

Afternoon Break

2:30 - 2:45 p.m.

Tying It All Together and Developing a Plan of Action

2:45 - 3:45 p.m.

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.

Final Q&A, Closing Remarks, and Conference Evaluation

3:45 - 4:15 p.m.

INSTRUCTORS

Brian Daugherty

Senior Vice President & Chief Philanthropy Officer, San Diego Humane Society

With more than 20 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).

ACADEMIC IMPRESSIONS STAFF

Whitney Egstad

Program Manager, Academic Impressions

Whitney Egstad believes the key to optimizing organizations is to cultivate and empower lifelong learners. Her mission is to do just that. For twelve years, she has designed learning experiences for diverse groups of professionals and students. As program manager, she performs market research and collaborates with subject matter experts to develop impactful professional learning programs for leaders in higher ed. In addition to directing program operations, she serves as an instructional design consultant for AI's online courses and tool kits. A pedagogue at heart, Whitney absorbs emergent research in neuroeducation, universal design, DEI, eLearning, and memory. She applies this research, as well as program data and feedback, in the development and revision of her programs.

LOCATION

August 5 - 6, 2019 | Baltimore, MD

Hotel:

Hyatt Regency Baltimore
300 Light Street
Baltimore, MD 21202
410.528.1234

Room rate:

\$185 + tax

Room block dates:

The nights of August 4 and 5, 2019.

Room block cutoff date:

July 15, 2019.

Reserve Your Room: Please call 410.528.1234 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