DEVELOPING A STRATEGIC PLAN FOR STUDENT PHILANTHROPY: EDUCATING STUDENTS FROM ACCEPTANCE LETTER TO NEW ALUM

July 22 - 24, 2019 | Baltimore, MD

Craft a comprehensive, multi-year plan to educate your students about philanthropy and increase their participation in giving.

Student philanthropy is becoming a top priority for an increasing number of advancement shops—for good reason. Institutions that actively invest in education and programming around student fundraising have a tendency to raise more money per capita and be more successful at filling their long-term donor pipeline with alumni.

To maximize consistent engagement and giving, students must have a continuous progression in their philanthropic education and, consequently, giving participation.

Join us in Baltimore, MD for a holistic learning experience and discover how to craft a comprehensive plan to educate students about philanthropy throughout their full lifecycle with your institution—from before they step foot on campus all the way through their first years as alumni.

You will leave this program with a collection of tangible resources that will guide your institution toward implementing a comprehensive multi-year strategy to build affinity and educate students about philanthropy:

- Portfolio of engagement ideas
- Completed gap analysis on your current offerings
- Plan of action to secure buy-in from institutional leaders and implement a multi-year plan

WHO SHOULD ATTEND

A strong student philanthropy program requires an institutional commitment and buy-in from a wide range of individuals, so we encourage advancement professionals, especially those in alumni relations and annual giving charged with building a program, to invite their executive champions and other campus partners.

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AGENDA

Day 1 | July 22, 2019

Registration for Conference Participants

12:30 - 1:00 p.m.

Welcome and Opening Remarks

1:00 - 1:30 p.m.

Vision and Strategy: Developing a Multi-Year Education Plan

1:30 - 2:30 p.m.

We will share a vision and strategy for creating a culture of philanthropy on campus throughout the student experience and will discuss how higher education's current context requires institutions to invest in student philanthropy programs. You will be introduced to student philanthropy as a strategic issue that will help you frame your goals, build your case for a comprehensive multi-year program, and get buy-in from the highest levels at your institution.

Afternoon Break

2:30 - 2:45 p.m.

Intentional Student Philanthropy: A Proven Model

2:45 - 3:45 p.m.

A successful student philanthropy program is dependent on three core components: awareness, gratitude, and giving. Each program should include these components, although their individual prominence will vary depending on the stage of your initiative. This session will walk you through our model for student philanthropy, outlining the core components and how they come together to guide a holistic and progressive approach over the student experience.

Gap Analysis: Evaluating Student Philanthropy at Your Institution

3:30 - 4:00 p.m.

Before you can consider opportunities for improving your student philanthropy program, you need to understand where your current program has gaps. In this working session, you will consider:

- Your institution's student population
- The level of awareness, gratitude, and giving of your current students in each year
- Where you should focus your new efforts the most

You will take away a completed gap analysis that will help you prioritize your efforts moving forward.

Day 1 Closing and Q&A

4:00 - 4:15 p.m.

Networking Reception (included in registration fee)

4:15 - 5:15 p.m.

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Day 2 | July 23, 2019

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Creating Awareness

9:00 - 10:30 a.m.

Having students become aware of your institution's mission, its resources, and where it derives its money is essential to cultivating philanthropic alumni. Our faculty will cover communication, traditions, and events that effectively educate students—from their first day on campus—on the importance of philanthropy and will provide suggestions for how to grow student awareness each year.

Morning Break

10:30 - 10:45 a.m.

Developing Gratitude: Venues for Exhibiting Gratitude

10:45 a.m. - 12:15 p.m.

Once students become aware that tuition only covers a portion of an institution's operating costs, they can begin to appreciate those donors who have graciously contributed the other portion. Gratitude can be developed in students by connecting them with alumni and the institution and by offering them programming to convey their gratitude. We will look at communication and events, including more subtle types of programming, which will develop gratitude in students and sustain that gratitude throughout their campus life cycle.

Lunch (included in registration fee)

12:15 - 1:15 p.m.

Cultivating Student Giving

1:15 - 2:45 p.m.

Students who understand how an institution gains its resources and are grateful to the donors who have provided them are ready to give. We will look at how to develop mission-based giving, when to solicit your students, and how to create a habit of giving in students that will continue long after graduation.

Afternoon Break

2:45 - 3:00 p.m.

Stewarding Student Donors: Transcending Transactional Giving

3:00 – 3:45

Learn how to move past transactional tactics to create meaningful stewardship experiences for these new donors. Learn how to follow up and demonstrate impact.

Developing Your Multi-Year Strategy

3:45 - 4:15 p.m.

In this session, you will revisit the core components in the student philanthropy model. Then, using the findings from your gap analysis, you will create an initial plan to create awareness, develop gratitude, and cultivate giving through additional programming you want to implement—or changes you'd like to make—at your institution.

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Day 3 | July 24, 2019

Continental Breakfast (included in registration fee)

8:30 - 9:00 a.m.

Budget Implications and Considerations for Student Philanthropy

9:00 – 9:45 a.m.

How will a new or re-energized student philanthropy program affect your budget? Which areas of your program will require the most resources? Who can you partner with on campus to shift some costs around? How can you make the case for additional funds? Our faculty will address these questions and offer suggestions on how to get more bang for your buck as you launch your program. During this final afternoon session, you will review the budget for your student philanthropy initiative and start to assess and reorganize your budget to align with the new programming you would like to implement.

Cultivating and Leveraging Campus Partnerships

9:45 – 12:00 p.m. (Includes morning break 10:30 – 10:45)

Partnering across your institution is critical to successfully developing a culture of student philanthropy on campus. However, as you develop your strategy and programming, you may struggle to answer the following: How do I shift campus partners from a mentality of "gaining buy-in" to actively engaging in the development of key messages and educational programming? How do I work through moments of tension? Our experts will focus on best practices and existing student research, lessons learned throughout the process, and examples of collaborative and award-winning programming.

Post-Conference Workshop: Strengthening the Student-to-Alumni Transition with a Robust Student Volunteer Structure

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

12:00 - 1:00 p.m.

Post-Conference Workshop: Strengthening the Student to Alumni Transition with A Robust Student Volunteer Structure

1:00 - 4:00 p.m.

Join us to learn about 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.

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INSTRUCTORS

Elise M. Betz
Executive Director of Alumni Relations, University of Pennsylvania

Elise began her tenure at Penn as an associate director of The Penn 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," a comprehensive student advancement program. Elise's work in this area helped increase senior gift participation from 18% in 2001 to over 68% in 2008 and earned her a 2006 UPenn Model of Excellence Award. She presents at advancement conferences across the country and has consulted with numerous institutions interested in starting student advancement programs.

Harmonie Farrow
Director of 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.

Kat Walsh
Director of Diversity, Equity, and Inclusion (DEI) Initiatives and Student Engagement, University of Michigan

As part of the University of Michigan's five year initiative for creating a more vibrant campus, Ms. Walsh heads department-wide efforts toward implementing policies aimed at diversifying and creating more equitable opportunities for OUD staff, donors, and volunteers. Ms. Walsh also leads student philanthropy initiatives on the University of Michigan campus. This involves developing a culture of giving among Michigan students through outreach, education, and fundraising initiatives. As director of student engagement, Ms. Walsh designed and oversees the award-winning program designer for the Development Summer Internship Program (D-SIP) aimed at creating a pipeline of young, diverse talent into the fundraising profession. D-SIP introduces college students to fundraising as a career path through work placement in a fundraising office across the U-M campus, coursework for credit, and a rigorous professional development component. This program won the 2010 Detroit Crain's Nonprofit Employer of the Year award for the state of Michigan and CASE's 2008 Grand Gold and Gold Circle of Excellence awards for fundraising and collaborative programs respectively.

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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.

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LOCATION

July 22 - 24, 2019 | Baltimore, MD

Hotel:

Hyatt Regency Baltimore
300 Light Street
Baltimore, MD 21202
410.528.1234

Room rate:

$159 + tax

Room block dates:

The nights of July 21, 22 and 23, 2019.

Room block cutoff date:

June 30, 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.

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