

TRANSFORMATIONAL GIFTS: ATTAINING THE GIFT OF A LIFETIME

July 11 - 12, 2019 | Seattle, WA



Navigating a transformational gift can be one of the most important and impactful events for your institution. How are you engaging your top donors?

SPEAKER CALLOUTS

Lynne Wester

Lynne brings the donor's perspective in mind at every step of the way. Her priority is to maintain a donor-first mindset from proposal to agreement to post-gift stewardship.

Dexter Bailey

Dexter brings the leadership perspective, as well as his skills in establishing a cohesive internal vision to match with a donor's intent. He gives expert advice pertaining to proposal development.

Mitchell Spearman

Mitchell brings frontline experience and top-tier cultivation and solicitation skills. His emphasis is on ensuring cross-campus collaboration to secure the success of a transformational gift.

Learn strategies for cultivating and soliciting one of your top donors in a way that can alter the future of your institution. Understanding what motivates and compels donors to make a transformational gift is a key aspect that is missing at many shops. This unique learning experience will help you successfully navigate the internal and external complexities of this significant undertaking in a way that advances the vision of your institution. You will learn how to:

- Inspire donors to make a transformational gift
- Develop a successful proposal
- Cultivate and solicit donors with transformational capacity
- Implement a stewardship plan for transformational donors

Included with your registration is a workbook with action-planning worksheets and stewardship tools that will be invaluable as you develop your transformational gift strategy.

COME WITH A DONOR IN MIND

This conference will be most valuable if you have a specific donor in mind whom you wish to cultivate, solicit, and steward. Principal, major, and planned gift officers, as well as vice presidents of advancement, directors of development, and stewardship/donor relations professionals, will leave with a comprehensive strategy for their institutions.

POST-CONFERENCE WORKSHOP: STRATEGIC STEWARDSHIP PLANS FOR TOP PROSPECTS

Strategic stewardship is critical before, during, and after a transformational gift has been made. It will further the vision of a donor's transformational gift, naturally leading to the next gift. In this post-conference workshop, you will design strategic stewardship plans for your top transformational gift prospects to ensure comprehensive engagement throughout the relationship.

FOLLOW THROUGH WITH SUCCESS COACHING

Have you ever gone to a training only to find that you came back with great ideas but don't have the time, support, or skills needed to make the changes?

Academic Impressions has produced thousands of trainings and we have learned that utilizing a coach after attending a conference helps provide accountability and bridges the training with the on-the-ground work of getting the job done.

As a result, we are now offering success coaching on select conferences.

- Purchase this training + 3 one hour follow up success coaching calls
- Work with an assigned coach who has extensive experience in higher ed.
- Get individualized support to help you follow through on what you've learned.
- Workshop your plans, run your ideas by someone and get additional help/practice.

To learn more, contact Patricia Sandler at patricia@academicimpressions.com or purchase the Premium Pass with success coaching.

AGENDA

Day 1 | July 11, 2019

Registration and Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Opening Comments and Introductions

8:30 - 9:00 a.m.

The Anatomy of a Transformational Gift

9:00 - 10:15 a.m.

Our expert faculty will share their experiences in cultivating, soliciting, securing, and stewarding a transformational gift. Through these insights, you will gain a deeper understanding of the transformational donor cycle and the strategies associated with the process.

Morning Break

10:15 - 10:30 a.m.

Building and Aligning the Vision

10:30 a.m. - 12:00 p.m.

A transformational vision is one that combines a donor's passion and ability with an institution's mission and opportunity. This vision is complex, yet highly personalized, and is a process that needs collaboration from the start.

Lunch (included in registration fee)

12:00 - 1:00 p.m.

Top Tier Cultivation and Solicitation

1:00 - 2:15 p.m.

The cultivation and solicitation process requires strategy different from that of the more common major gifts. Our expert instructor will guide you as they outline the components to top-tier cultivation and solicitation.

Developing a Cultivation Strategy – Working Session

2:15 - 3:00 p.m.

Building on the fundamentals presented in the last session, you will apply top tier cultivation and solicitation concepts by assessing your current donors, visions, and partnerships. With the support of your colleagues, peers, and faculty, you will identify the best strategy and timeline to guide your donor forward.

Afternoon Break

3:00 - 3:15 p.m.

AGENDA

Day 1 (CONTINUED)

Internal Partnerships

3:15 - 4:15 p.m.

Many internal partnerships must be utilized in order to execute a successful transformational gift proposal and to avoid conflict or insufficient follow-up. Additionally, each partner must have clearly defined roles throughout each stage of the process. We will outline the roles of university leadership, development, and academic administration, to better understand how to uncover a transformational vision for your institution.

Navigating Power Dynamics

4:15 - 5:00 p.m.

This session will explore how donor power dynamics can affect your cultivation and solicitation strategy, and ultimately a decision on whether or not to accept a gift. We will talk through how to help guide conversations, defining boundaries in gift agreements, and how to navigate these dynamics with the institution, with their family, and with their work.

Networking Reception (included in registration fee)

5:00 - 6:00 p.m.

Day 2 | July 12, 2019

Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Developing the Proposal

8:30 - 10:00 a.m.

Transformational gift proposals take craft, precision, and significant detail to demonstrate the future return on investment. We will detail the expectations of high-level wealth donors and the critical components of successful proposals.

Morning Break

10:00 - 10:15 a.m.

Donor Relations for Top Tier Donors

10:15 - 11:30 a.m.

Our expert instructor will outline the style and level of stewardship that is most effective with transformational gift donors. The lessons included will provide an understanding of how this level of stewardship is critical for securing a transformational gift and cultivating the next gift.

Faculty Q&A and Evaluation

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

AGENDA

Day 2 (CONTINUED)

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

12:00 - 1:00 p.m.

Post-Conference Workshop: Strategic Stewardship Plans for Top Prospects

1:00 - 4:00 p.m.

Strategic support and transformational stewardship must be planned with an overall vision and goal in mind. In this post-conference workshop, you will put together a strategic stewardship plan—a process that will allow you to better understand the donor experience and the comprehensive engagement needed for transformational giving. After workshopping the plan with peers and our expert speakers, you will leave with a comprehensive engagement strategy unique to your donor and institution.

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. 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.

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

Mitchell Spearman

Director of Principal Gifts, The University of Texas at Austin

Through thoughtful and aspirational planning, Mitchell has developed significant principal gift prospects and proposals that have funded transformational moments at Drexel, the University of Arkansas, Occidental, and he now begins his work at the University of Texas at Austin. As a principal gift officer, a former AVP and senior gift planner, he believes strongly in a collaborative team approach and has found success in connecting campus partners to the development experience in the earliest moments of the gift design. Mitchell has also found considerable success in working with entrepreneurs, building a principal gift level parents initiative and developing major and principal gift strategies for international prospects.

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. She also holds a master's in strategic fundraising and philanthropy with an emphasis in higher education.

ACADEMIC IMPRESSIONS STAFF

Gwen Doyle Herbert

Senior Program Manager

Gwen is a senior program manager for our program development team. In her role, she oversees a team of program managers, and produces programming across several of our domains, with extensive experience in advancement and alumni relations. Prior to joining AI, Gwen worked for George Washington University in finance and project management for their Academic Technologies team, as well for an organization that used Washington D.C. as a living classroom to develop the country's high achieving youth through experiential education. She also enjoys serving her communities, and was the volunteer coordinator for Miriam's Kitchen, and on the Board of Directors for Break Away. Gwen is a proud alumnus of Cornell University.

LOCATION

July 11 - 12, 2019 | Seattle, WA

Hotel:

Hyatt Regency Seattle
808 Howell Street
Seattle, WA 98101
206.973.1234

Room rate:

\$239 + tax

Room block dates:

The nights of July 10 and 11, 2019.

Room block cutoff date:

June 19, 2019.

Reserve Your Room: Please call 206.973.1234 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