

# BUILDING BETTER GIFT AGREEMENTS IN HIGHER EDUCATION

August 8-9, 2019 | Baltimore, MD



## *Learn to compose stronger gift agreements and bolster your documentation process.*

### OVERVIEW

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Many shops struggle with broken gift agreement language and processes, which can — in extreme cases — result in donor lawsuits and damaging publicity. To mitigate these risks, shops must look for ways to strengthen their gift agreement language and processes to protect all involved stakeholders, donors, and the institution alike.

Join us in Baltimore for an important learning experience to learn methods and strategies to improve the content of your gift agreements and documentation process. Our experienced faculty panel will discuss how to:

- Draft sound gift agreements that protect your institution
- Incorporate legal and pragmatic best practices
- Improve your gift agreement documentation process
- Compose donor-centered agreements
- Mitigate risks and threats

During this practical and interactive workshop you'll receive expert feedback on your sample gift agreements, as well as tools and templates to develop your gift agreements and associated processes.

### YOU WILL LEAVE WITH TOOLS AND RESOURCES

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Attendees will take away a collection of tools, such as:

- New Commitment Process Flow
- Gift Documentation Form
- Sample Legal Whitepaper
- Gift Documentation Handbook Template
- Laws and Regulations Affecting Scholarship Programs

### WHO SHOULD ATTEND

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The content of this program is designed for those responsible for developing and maintaining successful gift agreements. Professionals from across the shop are encouraged to attend either individually or as a team.

### BRING YOUR TEAM AND SAVE!

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

# AGENDA

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## DAY 1

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

8:30 – 9:00 a.m.

### Welcome and Introductions

9:00 – 9:30 a.m.

### The Foundations of Gift Documentation

9:30 – 10:30 a.m.

In this opening session, our faculty will define the fundamentals of successful gift documentation and set the stage for the conference.

### Morning Break

10:30 – 10:45 a.m.

### Developing the Baseline

10:45 a.m. – 12:00 p.m.

Every gift agreement must include essential information about the donor, the fund, and the agreement itself. Learn what you need to document and view samples of the language in various agreements.

### Lunch

12:00 – 1:00 p.m.

### Managing the Legal Considerations for Donor Restrictions and Preferences

1:00 – 2:30 p.m.

This session will cover the legal considerations around donors' potential preferences and restrictions. You will learn best practices to avoid legal consequences as well as how and when to involve legal counsel in the gift documentation process.

### Afternoon Break

2:30 – 2:45 p.m.

### Managing Donor Restrictions and Preferences: Practical considerations

2:45 – 3:45 p.m.

Beyond legal considerations, shops must also decide if a gift is practical and will ultimately serve the institution's mission. Our faculty will share examples of practical matters to consider and tips for how to respond to impractical requests.

### Donor-Friendly Gift Documentation

3:45 – 4:45 p.m.

Perhaps the trickiest part of composing gift agreements is adding touches of warmth to an otherwise frigid document. Our faculty will share ways to keep the donor at the heart of this process and enhance the donor's experience.

### Networking Reception

4:45 – 5:45 p.m.

# AGENDA

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## DAY 2

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

8:30 – 9:00 a.m.

### **Educating Gift Officers: Building a Tool Kit**

9:00 – 10:30 a.m.

Gift agreements involve many stakeholders. One of the best ways to ensure sound gift documentation is to properly train your partners and empower them with tools. In this session, you will learn what needs to go into a tool kit and see examples of what has worked well.

### **Morning Break**

10:30 – 10:45 a.m.

### **Improving Your Gift Agreement Processes**

10:45 a.m. – 12:00 p.m.

Our faculty will tackle common process pain points such as tracking and transparency. You'll identify where your process can be improved and take away best practices to incorporate back on campus.

## INSTRUCTOR

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### **Kathleen Diemer**

#### **Associate Vice President, Advancement Relations, George Mason University**

Kathleen Diemer, CFRE, currently serves as Associate Vice President of Advancement Relations at George Mason University. In her role at Mason, she oversees the donor relations, advancement communications, prospect research and management, and information technology and reporting teams. In addition, she played a key role in helping to steer the success of the university's \$500 million *Faster Farther* campaign.

Prior to her work at Mason, Kathleen helped guide the University of Maryland's central donor relations unit through two comprehensive fundraising campaigns. During her tenure at Maryland, she helped design and implement the university's Celebration of Scholarships website and Online Endowment Donor Portal, which are widely-recognized as the first applications of their kind. These award-winning projects set industry standards and served as models for donor relations and stewardship programs at other organizations.

Kathleen has proudly served as both Secretary-Treasurer and President of the Association of Donor Relations Professionals (ADRP). During her term as President, she helped strengthen association policy related to partnerships and conflict of interest, and also led the association through a strategic visual identity and re-branding process.

During her two decades in the field of higher education fundraising she has written or reviewed approximately 2,000 gift agreements.

## ACADEMIC IMPRESSIONS STAFF

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### **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

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***August 8-9, 2019 | Baltimore, MD***

***Hotel:***

Hyatt Regency Baltimore Inner Harbor  
300 Light Street  
Baltimore, MD 21202  
410-528-1234

**Room rate:**

\$159 + tax

**Room block dates:**

The nights of August 7 and 8, 2019.

**Room block cutoff date:**

Thursday, July 18.

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