

INSTITUTE FOR ANNUAL GIVING

January 15 - 17, 2020 | Chicago, IL



Breathe new life into 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 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 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 who want to learn how to more efficiently target giving populations. This conference assumes a general level of annual giving knowledge. Newcomers to fundraising are encouraged to add the pre-conference workshop to their conference experience.

BRING YOUR TEAM AND SAVE

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

AGENDA

Wednesday, January 15, 2020 | Day 1

Continental Breakfast for Pre-Conference Workshop Attendees (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 fund, including a thorough overview of channels.

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

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

Main Conference

Conference Registration

12:30 – 1:00 p.m. – Starting registration 30 minutes later

Welcome and Opening Remarks

1:00 - 2:00 p.m. – Starting conference 30 minutes later.

Landscape of Annual Giving

2:00 - 3:15 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.

Break

3:15 - 3:30 p.m.

Data Driven Strategy

3:30 - 4:30 p.m.

To have a strong annual giving program, you must be able to strategically analyze your data to continue to increase funds raised in the current fundraising climate. With your SWOT results in hand, you will learn basic data analysis techniques for essential reporting, segmenting, and tactical decision making. You will also discuss the key metrics and benchmarking figures for your program as well as for various solicitation tools.

AGENDA

Day 1 (CONTINUED)

Networking Reception (included in registration fee)

4:30 - 5:30 p.m.

This informal reception is your chance to decompress, have some refreshments on us, and expand your network of connections. Our programs are intentionally designed for smaller groups, so this is a great time to catch-up with attendees and speakers whom you may not have connected with yet.

Thursday, January 16, 2020 | Day 2**Continental Breakfast (included in registration fee)**

8:00 - 8:30 a.m.

Annual Giving as a Communications Strategy

8:30 - 9:45 a.m.

We will discuss how to leverage annual giving as an intentional communications tool, demonstrate how to reinforce key messages, and leverage your voice to position your shop for future resources and support.

Break

9:45 - 10:00 a.m.

Digital Solicitations: Effective Fundraising in a New Era

10:00 - 11:30 a.m. – extended 15 minutes

Most institutions are leveraging digital media for solicitations, but some of us are finding that the most innovative solicitations are not necessarily those that move the needle. We will cover the most productive digital strategies.

Crowdfunding and Micro Campaigns

11:30 a.m. - 12:30 p.m. – shortened 15 minutes

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

Lunch (included in registration fee)

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

AGENDA

Day 2 (CONTINUED)**Days of Giving**

1:30 - 2:30 p.m.

What strategies create maximum impact on giving days? Learn how to harness urgency, apply innovative techniques, and follow best practices to unite and engage your donors in 24 hours of fast-paced philanthropy.

Break

2:30 - 2:45 p.m.

The Future of Phonathons: A Facilitated Discussion

2:45 - 3:45 p.m.

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? Are your calls planned 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.

Network and gather new ideas as you browse a gallery of your peers' solicitations.

Friday, January 17, 2020 | 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.

This session will cover how to leverage your metrics to make decisions, course correct, and report results to leadership.

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. We will show you how to use existing resources and opportunities to maximize your time, budget, and stewardship efforts.

Working Session

10:45 - 11:15 a.m.

Using the template provided, 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 - 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 – 3:45 p.m.

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

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INSTRUCTORS

Brian Daugherty**Senior Vice President & 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 public ivy universities and leads all top 50 nationally ranked USNWR public universities. 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

January 15 - 17, 2020 | Chicago, IL

Hotel:

Wyndham Grand Chicago Riverfront

71 East Wacker Dr.

Chicago, IL 60601

312-346-7100

Room rate:

\$109 + tax

Room block dates:

The nights of January 14, 15, and 16, 2020.

Room block cutoff date:

December 24, 2019.

Reserve Your Room: Please call 312-346-7100 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