ACADEMIC IMPRESSIONS

CONFERENCE

FRONTLINE FUNDRAISING: ESSENTIALS OF GIFT SOLICITATION

January 23 - 24, 2020 | Denver, CO

Discover how to more confidently solicit prospects and donors.

OVERVIEW

This highly interactive conference is designed for those who need to quickly train staff who are tasked with frontline fundraising responsibilities, including gift officers, academic leaders, and/or volunteers, in order to achieve greater fundraising success. This program is a great fit if you want to train a group of people and are looking for an approach to fundraising that is both more successful and rewarding. This workshop:

- Immediately impacts fundraising results
- Provides a more strategic and successful approach to identifying prospects and cultivating donors
- Is highly practical and skills-based and can get those new to philanthropy and frontline fundraisers up-to-speed fast

GREAT FIT FOR ALL SKILL LEVELS

This material is beneficial for both new and experienced frontline fundraisers, as well as academic leaders and fundraising volunteers who want to improve or refresh solicitation skills. Whether you focus on annual giving, major giving, principal giving, or planned giving, you will leave with increased confidence in your calls, visits, asks, and portfolio management skills.

AGENDA

DAY 1

Conference Registration and Continental Breakfast (included in the registration fee)
8:30 - 9:00 a.m.

Opening Comments and Introductions
9:00 - 9:30 a.m.

Preparing for Fundraising Success
9:30 - 10:45 a.m.

We will detail how to best plan your calls and visits by utilizing the following tactics:

- Matching a prospect's interests to your institution
- Engaging and involving the prospect
- Determining the proper ask amount, project type, and interest area
- Preparing for the ask with "the five W's"

Morning Break
10:45 - 11:00 a.m.

Making the Initial Outreach and Managing Donor Visits
11:00 a.m. - 12:30 p.m.

The initial outreach you make on the phone, or through other means, will establish the tone for your ongoing interactions with your prospect, making it one of the most crucial points in the philanthropic process. This session will cover:

- What information you need to make a successful first outreach
- Tips for securing an initial appointment, including moving through gatekeepers
- Phone call scripting and planning your calls
- Managing conversations and transitioning them to be most effective
- Conversations that lead to productive visits

Lunch (included in registration fee)
12:30 - 1:30 p.m.

Making the Initial Outreach and Managing Donor Visits (cont.)
1:30 - 3:45 p.m.

The previous session will resume with content and will include time for role playing and practical application.

AGENDA

DAY 1 (CONTINUED)

Afternoon Break
3:45 - 4:00 p.m.

Portfolio Management
4:00 - 5:15 p.m.

Once you have mastered the cold call and understand how to lead productive visits, you will learn how to identify top prospects from a sample portfolio using our expert facilitator's techniques. Just as critical as uncovering your top prospects, you will gain strategies to remove inactive leads from the portfolio to better focus your fundraising time and effort.

Networking Reception (included in registration fee)
5:15 - 6:15 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.

DAY 2

Continental Breakfast (included in the registration fee)
8:30 - 9:00 a.m.

Making the Ask
9:00 a.m. - 12:00 p.m. (includes morning break)

Making a compelling ask and closing a solicitation are often the most daunting and stressful moments in the career of a fundraiser. The ask must be framed in a way that compels your donor to jump into action and support your institution. In this interactive session, you will practice the intricacies of making the ask. Learn how to:

- Use the cultivation process to naturally build to the ask
- Create a conducive environment for a successful ask
- Script and role-play to move the process forward

Lunch (included in the registration fee)
12:00 - 1:00 p.m.

AGENDA

DAY 2 (CONTINUED)

Moves Management
1:00 - 2:30 p.m.

Too often, development officers get stuck in the transitional pieces of the donor cycle—unable to smoothly move prospects through cultivation, solicitation, and stewardship, which would subsequently upgrade them to the next giving level. Learn how to assess and develop strategies for your portfolio of donors by focusing on:

- The right questions to ask and when to ask them
- Identifying prospects who need to be upgraded or downgraded
- Tactics for moving donors through each stage of the solicitation cycle

Afternoon Break
2:30 - 2:45 p.m.

Action Planning
2:45 - 3:00 p.m.

In this final session, you will assess and synthesize the strategies and practices worked on over the previous two days, outlining your key takeaways and new techniques that you will be able to implement.

Final Q&A, Closing Comments, and Evaluations
3:00 - 3:30 p.m.

INSTRUCTORS

Kathy Drucquer Duff

Coach, Consultant, and Optimizer, KDD Philanthropy

Kathy is an executive advancement officer with over 20 years of experience helping non-profits and institutions transform the way they practice philanthropy. Kathy provides this expertise from her experience in higher education, where she developed fundraising plans that have secured gifts of up to nine figures. The “grow your own” fundraiser model that Kathy developed is built on a structured talent management program that maximizes existing resources, inspires loyalty, and generates fundraising results. This approach has led to comprehensive programs in donor pipeline development, talent acquisition, new-hire onboarding, individualized retention, and in-house professional development.

Kathy’s experience includes serving as Associate Vice Chancellor of University Development at University of California San Diego, Vice President of Philanthropy for the Sharp HealthCare Foundation, and Associate Vice President of University Relations and Development for San Diego State University. Kathy is a sought-after consultant and speaker for industry associations, including CASE and ADRP, and speaks on a variety of fundraising trainings with Academic Impressions.

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

January 23 - 24, 2020 | Denver, CO

Hotel:

Brown Palace

321 17th Street

Denver, CO 80202

303.297.3111

Room rate:

$199 + tax

Room block dates:

The nights of January 22 and 23, 2020

Room block cutoff date:

January 2, 2020.

Reserve Your Room: Please call 303.297.3111 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