

# ENHANCING YOUR DONOR AND PORTFOLIO STRATEGY: AN INSTITUTE FOR ADVANCED GIFT OFFICERS

December 10 - 11, 2019 | Chicago, IL



***Sophisticated donor strategies are the foundation of successful, ambitious fundraising. Join us to sharpen your skillset as a seasoned gift officer and increase giving at your institution.***

## OVERVIEW

---

In today's fast changing world of advancement, gift officers with several years of tenure face a set of unique challenges related to levelling up their donor and portfolio strategies, creating a long-term vision for their major gift efforts, and assuming more of a leadership role at their institution.

Join us for this highly interactive and engaging learning experience to elevate your skills as an advanced gift officer, and learn how to utilize a strategic lens and visioning in your work. Our expert speakers will dive deep into:

- Current and emerging trends and how you can use them to your advantage in your work
- Best practices for advancing your portfolio by upgrading current donors to major gifts in a thoughtful manner
- Innovative strategies for planning, negotiating, and stewarding large, complex, and blended gifts
- Storytelling: crafting the narrative around major gifts to enhance communications to donors and your leadership team
- Considerations for managing portfolio health at the institutional level

During this practical training, we will engage in a series of activities to help you build a stronger understanding of campus resources that support your strategies, a deeper insight into the necessity of collaboration, and a greater willingness to chart donor strategies on paper.

## POST-CONFERENCE WORKSHOP: LEVERAGING LEADERSHIP AS A MAJOR GIFTS OFFICER

---

In this optional workshop, we will discuss creating a culture for your team and unit, supervision as a more advanced gift officer, and the nuts and bolts of managing your own portfolio while supporting a team. We will cover the following topics:

- Vision setting for your unit or team
- Setting outcomes and objectives for your team
- How you can empower your team
- Active mentorship
- Prioritizing staff development
- Essential times to come together in teams
  - Management cohort
  - MGO cohort
  - Bi-weekly team meetings
  - Weekly strategy meeting with frontline fundraisers

## WHO SHOULD ATTEND

---

This conference was designed for **Major Gift Officers, Planned Giving professionals, Frontline Fundraisers, and other Advancement staff with five or more years' tenure within the field**, looking to continue developing their major gift solicitation skills and learn new and innovative strategies for visioning and enhancing their work.

## AGENDA

---

***Tuesday, December 10, 2019***

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

*8:30 – 9:00 a.m.*

**Opening Remarks**

*9:00 – 9:30 a.m.*

**The Changing World of Philanthropy**

*9:30 – 10:30 a.m.*

We will detail current trends within the major gifts space and talk about how you can position you and your team for success and provide a backdrop for expanding approach and outreach. The following themes will be covered:

- Donor advised funds
- Women as philanthropic decision makers
- Interdisciplinary gifts
- Transformational gifts

**Morning Break**

*10:30 – 10:45 a.m.*

**Continuing the Conversation: Moving Current Donors to Major Gifts**

*10:45 a.m. – 12:15 p.m.*

As you become more seasoned within your role, the strategy for current donors making second gifts and increasing their giving level becomes increasingly important. We will discuss considerations for advancing your portfolio and practice ways to move these conversations forward, including:

- An emphasis on an interdisciplinary approach
- How do we look for these types of gifts?
- What are we listening for?
- What makes these gifts different?
- Difficult dean conversations

**Lunch (included in registration fee)**

*12:15 – 1:15 p.m.*

## AGENDA

---

### ***Tuesday, December 10, 2019 (CONTINUED)***

#### **Understanding Donor Motivations**

*1:15 – 3:45 p.m.*

Grasping the motivations of donors and prospects is a critical skill for building relationships that lead to better donor engagement, generosity, and retention. Nuance and flexibility are essential to this skill, as every donor is different, and each of their motivations to invest in our institutions is unique. In this session, we will walk you through the use of specific tools to map out individual relationships in your portfolios, identify gaps in understanding, and determine next steps in donor strategies.

#### **Afternoon Break**

*3:45 – 4:00 p.m.*

#### **Strengthening Your Institutional Portfolio**

*4:00 – 5:00 p.m.*

Fundraising portfolios are often crafted with one goal in mind: to put the best prospects in front of development officers so they can raise the largest donations. This focus on individuals neglects the larger priority of the institutional portfolio. A thriving philanthropic program engages prospects across the broader buckets of annual, major, and planned giving, as well as prospects who can support alumni engagement, to create a strong and diverse institutional portfolio. You will gain this broader perspective and build practices and expectations for strengthening the larger portfolio while achieving your own fundraising goals.

#### **Networking Reception (included in registration fee)**

*5:00 – 6:00 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.

## AGENDA

---

### *Wednesday, December 11, 2019*

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

8:30 – 9:00 a.m.

#### **Strategy Deep Dive**

9:00 – 10:30 a.m.

We will explore how written strategies not only support donor engagement but are also excellent tools in building trust with academic partners. Sophisticated donor strategies are the foundation of successful, ambitious fundraising. In this deeper dive into developing these strategies, we will use the “strategy speed friending” tool. You will build a stronger understanding of campus resources that support strategies, a deeper insight into the necessity of collaboration, and a greater willingness to chart donor strategies on paper.

#### **Morning Break**

10:30 – 10:45 a.m.

#### **Complex Gifts and Gift Planning**

10:45 – 11:30 a.m.

As you progress as a gift officer it's important that you are positioning and framing yourself as the donor's philanthropic advisor. The ask can become more complex and must be framed in a way that inspires your donor and allows them to see how they can contribute and think longer-term. We will discuss:

- Comfort around large asks
- Negotiating and stewarding large and complex gifts
- Innovative strategies for complex gifts and gift planning

#### **Telling Your Story**

11:30 a.m. – 12:00 p.m.

Cultivating gifts is important – equally so is telling the story of the gift and highlighting the institutional response. Donors are looking for more real time opportunities to see the impact of their gifts. In this session, we are hoping to role model incremental updates for campus and faculty partners, to continue that transparency. The focus will be the value of storytelling, as well as strategies you can utilize with both your donors and internal leadership team to share a compelling narrative of giving.

#### **Final Conference Q & A and Evaluation**

12:00 – 12:30 p.m.

## AGENDA

---

### ***Wednesday, December 11, 2019 (CONTINUED)***

#### **Lunch (included in registration fee with post-conference workshop)**

*12:30 – 1:30 p.m.*

#### **Post-Conference Workshop: Leveraging Leadership as a Major Gifts Officer**

*1:30 – 4:30 p.m.*

In this optional workshop, we will discuss creating a culture for your team and unit, supervision as a more advanced gift officer, and the nuts and bolts of managing your own portfolio while supporting a team. We will cover the following topics:

- Vision setting for your unit or team
- Setting outcomes and objectives for your team
- How you can empower your team
- Active mentorship
- Prioritizing staff development
- Essential times to come together in teams
  - Management cohort
  - MGO cohort
  - Bi-weekly team meetings
  - Weekly strategy meeting with frontline fundraisers

## 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.

### **Zach Smith**

#### **Executive Director of Development, Jacobs School of Engineering, University of California San Diego**

Zachary Smith leads the efforts of the external relations staff at the Jacobs School which includes major and principal gifts, donor relations, stewardship, and events. He works directly with the Dean of the School to provide strategic direction for a comprehensive major and principal gifts program as the University completes the next comprehensive campaign. Smith is passionate about advancing higher education by developing strategic and meaningful relationships.

At the Palomar Health Foundation, Smith served as the Senior Director of Development where he oversaw a team of fundraising professionals dedicated to the advancement of Palomar Health, California’s largest public health care district. Prior to this position, he served as the Director of Major Gifts within the Palomar Health Foundation where he had the primary fundraising responsibility for the divisions of Orthopedic Medicine, Cardiovascular Care, Men’s Health, Rehabilitative Care, and Neurosciences. He cultivated his passion for higher education at Portland State University, where he earned a B.S. in Criminology and Criminal Justice, with a minor in Civic Leadership. Smith was a member of the PSU Wrestling Team and competed in the PAC 10 Division, during which he was honored as an All-Academic PAC 10 wrestler. He went on to earn his MBA at the Rady School of Management at UC San Diego.



## ACADEMIC IMPRESSIONS STAFF

---

### **Brittany Iwaszkiw**

#### **Program Manager, Academic Impressions**

Brittany (she/her/hers) is a program manager, developing vibrant learning experiences for our attendees. In her role, she produces programming across several of our domains, with experience in advancement, alumni relations, and student success areas, including career services, advising and retention. Prior to joining Academic Impressions, Brittany worked in Housing and Residence Life at the University of Washington Tacoma, Fordham University, St. John's University New York, The Ohio State University, the University of North Carolina Greensboro, and Loyola University Chicago. Brittany obtained her Bachelor's degree from Western Illinois University and her Master's in Higher Education from Loyola University Chicago.

## LOCATION

---

***December 10 – 11, 2019 | 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 December 9 and 10, 2019.

**Room block cutoff date:**

November 18, 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