

A COMPREHENSIVE APPROACH TO MODERN CAMPAIGNS

February 24 - 26, 2020 | Salt Lake City, UT



Learn how to overcome common campaign challenges by taking a more intentional approach to your planning efforts.

OVERVIEW

There are many obstacles your campaign may encounter throughout its lifecycle. Changes in our financial climate, campus leadership, gift officer turnover, and more, can contribute to an adjustment in your best laid plans. By developing a more intentional strategy, you will be able to respond to changes and be more effectively adaptable.

Whether you are in a leadership role, working in frontline fundraising, or involved in stewardship, events, or communications, you will learn in-depth strategies and solutions to these major issues and more:

- How to effectively staff and resource your shop
- How gift officers should strategize their cultivation, partnerships, and asks
- What it takes to create an effective campaign communications strategy
- Running and managing effective volunteer programs and committees
- What campaign events you should be hosting and how to measure the ROI

This conference will be best for those who are in the later planning stages of a campaign or have launched.

POST-CONFERENCE WORKSHOP: COMMUNICATION TOOLS, PUBLICATIONS, AND MARKETING STRATEGIES

This interactive workshop will focus on the communication tools and publications that can boost the visibility and messaging of your campaign, as well as how you can incorporate video and other experiential components. Our expert instructor will show you examples of effective communications, review your campaign materials, and provide feedback to help you develop more compelling messages for your donors. You will leave this session equipped with tools to assess and continuously improve your own campaign materials when you return to campus.

WHO SHOULD ATTEND

Advancement leadership, campaign directors, frontline fundraisers, donor relations, and communications professionals who are involved in campaign planning, strategy, and management will benefit most from this conference. Teams are highly encouraged to attend to get the full benefit of the breakout sessions.

BRING YOUR TEAM AND SAVE!

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

AGENDA

Your registration fee includes full access to all conference sessions and materials, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, as well as refreshments and snacks throughout the conference.

Day 1

Registration for Main Conference Attendees

12:30 - 1:00 p.m.

Opening Comments and Introductions

1:00 - 1:30 p.m.

The Future of Campaigns, Current Obstacles, and Trends

1:30 - 2:30 p.m.

Where does the comprehensive campaign fit into the future of higher education fundraising? What is the future of the feasibility study? How are institutions using outside counsel and consultants? This session shall address common obstacles and discuss the current trends and thinking around campaign planning.

Afternoon Break

2:30 - 2:45 p.m.

Resourcing Your Campaign

2:45 - 4:30 p.m.

Running a modern campaign takes a unique blend of human and fiscal resources. During this session, you will learn practical tips for appropriately staffing and training for a capital campaign as well as insights on the additional infrastructure, technology, and budgetary resources your frontline fundraisers need to be successful. You will have the opportunity to identify where additional resources are needed in your shop. Working through checklists for staff, infrastructure, and budgetary resources, you will have the opportunity to identify where you are appropriately resourced, identify where there are gaps, and develop a prioritization plan for acquiring the resources you need.

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.

AGENDA

Day 2

Continental Breakfast (included in registration fee)

8:30 – 9:00 a.m.

Leveraging Your Internal and External Campaign Resources

9:00 – 10:00 a.m.

In our last session, we explore the different ways you can create teams to manage your campaign and initiatives. You likely found holes in your staffing and needs and are questioning for which roles you should permanently staff and which might make sense to be contracted. We will help you understand the options available in campaign consultants and allow you to determine what will work best for your shop and your situation.

Morning Break

10:00 - 10:15 a.m.

Aligning Donor Interests and Developing a Long-Term Solicitation Strategy

10:15- 11:45 a.m.

You spend months, even years, identifying and articulating campaign priorities with internal stakeholders, yet your top donors have interests in funding projects that lie outside of the official scope of the campaign. Our speakers will share insights on navigating the details of closing a gift, aligning internal and external priorities, and ensuring dollars are being allocated appropriately without compromising campaign (or prospect) priorities.

Lunch (included in registration fee)

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

Donor Relations and Communications in Campaign

12:45 - 2:15 p.m.

Knowing which stewardship activities and outreach are most appropriate and effective are critical in retaining your donors, especially during a sustained campaign period. This session will help you build a donor relations focus into your campaign plans and communications strategies. You will see examples of campaign case statements and how to better receipt your gifts, as well as, how to create and distribute acknowledgements. We will conclude with a shop-wide audit activity that you will be able to take back to your campus.

Afternoon Break

2:15 - 2:30 p.m.

AGENDA

Day 2 (CONTINUED)

Effectively Working with Campaign Volunteers and Committees

2:30 - 4:00 p.m.

Volunteers can be a great resource if managed and organized in an effective, structured, and intentional way. You will learn how to structure helpful volunteer programs and committees. You will also learn what goes into developing volunteer relationships and using their skills and talents in a way that not only makes them an asset to your campaign but also future donors and advocates, if they aren't already.

Day 3

Continental Breakfast (included in registration fee)

8:00 - 8:30 a.m.

Successful Campaign Events

8:30 - 10:00 a.m.

During your campaign, there are a number of purposeful events that you should consider to better engage donors with their philanthropy. Learn strategies on how to best position your president and leading advocates and how to effectively involve students and alumni. Our instructors will help you determine how many events should be launched annually and identify the metrics that will help you prove each event's success.

Morning Break

10:00 - 10:15 a.m.

Campaign Problem Solving: Planning for and Managing the Unexpected

10:15 - 11:30 a.m.

It's impossible to predict the unexpected that may occur during a campaign, such as the stepping down of a President, the loss of an advancement leader, or a PR issue that threatens relationships with donors and prospects. Budgetary, staffing, and donor support issues may also arise mid-campaign and threaten to derail your progress. However, this is not the time to panic; this is the time to reassess, realign, and restructure in the direction of success. Utilizing some sample scenarios, we will give you the tools and tactics to remain successful in your campaign efforts.

Closing Comments and Evaluations

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

AGENDA

Day 3 (CONTINUED)

Post-Conference Workshop: Communication Tools, Publications, and Marketing Strategies

Your registration fee includes the pre-conference workshop and materials, breakfast and lunch on Wednesday, as well as refreshments.

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

12:00 - 1:00 p.m.

Post-Conference Workshop: Communication Tools, Publications, and Marketing Strategies

1:00 - 4:00 p.m.

This interactive workshop will focus on the communication tools and publications that can boost the visibility and messaging of your campaign, as well as how you can incorporate video and other experiential components. Our expert instructor will show you examples of effective communications, review your campaign materials, and provide feedback to help you develop more compelling messages for your donors. You will then complete a campaign communications audit and work to draft more effective communications pieces for the future. You will leave this workshop equipped with tools to assess and continuously improve your own campaign materials when you return to campus.

INSTRUCTORS

Dexter A. Bailey, Jr.

Vice President for Advancement and Alumni Relations, California Institute of Technology (Caltech)

Dexter A. Bailey Jr. is a fundraising executive with over 25 years of experience. During his career, he has been directly involved in raising over \$1 billion while managing successful development and alumni relations programs at Stony Brook University, Worcester Polytechnic Institute, University of California at Berkeley, University of Washington, and Ohio University.

Dexter is recipient of the 2019 CASE Commonfund Institutionally Related Foundation Award. His expertise includes reengineering comprehensive fundraising programs, complex principal gifts, grateful patients, alumni relations, staff development, organizational optimization and comprehensive campaign implementation. In addition, Dexter often speaks on issues related to institutional leadership, governance and the role and experience of minorities in university advancement.

Prior to joining Caltech in July 2019, Dexter served for 8+ years as senior vice president for advancement at Stony Brook University and executive director of the Stony Brook Foundation (501c3) where he spearheaded the most successful campaign in the history of the State University of New York (SUNY) system.

He earned a BS in journalism from the Ohio University E.W. Scripps School of Journalism and an MBA from the University of Toledo.

Angela Joens

Assistance Vice Chancellor of Development Outreach, University of California Davis

Angela has extensive management, development and stewardship experience. In her current role she supervises annual giving, donor relations, research and prospect management, proposal services, marketing and communications, and development recruitment.

Prior to UC Davis, Joens was Vice President of Development Operations for the Mercy Medical Center Foundation in Des Moines, Iowa. She also served as the Senior Director of Donor Relations for the Iowa State University Foundation and worked for RuffaloCODY a for-profit company that assists the non-profits with fundraising. Her career began as a fundraiser for the American Cancer Society.

Joens is also a non-profit consultant, an executive coach, and speaks nationally on topics related to stewardship, development and leadership. She has been featured in several industry publications including CASE Currents Magazine and the Chronicle of Philanthropy. Joens earned her BA from the University of Iowa, her MPA from Iowa State University, and her Professional Life and Work Coach Certificate from UC Davis. She is a proud volunteer for the Association of Donor Relations Professionals (ADRP) and the Council for the Advancement and Support of Education (CASE).

INSTRUCTORS

Ashlyn W. Sowell

Associate Vice President for Campaign Operations and Engagement, Johns Hopkins University

Ashlyn W. Sowell has enjoyed a career in development for over 20 years. Her first position was as Director of Development for The Children's House at Johns Hopkins and The Grant-A-Wish Foundation (now known as the Believe in Tomorrow Children's Foundation). From there she moved to her alma mater, Duke University, serving as Annual Fund Director at The Fuqua School of Business and a Major Gift Officer at the Medical Center during Duke's \$2 billion campaign. In 2006, Ashlyn joined the development staff at Gettysburg College where she held several key positions. As Associate Vice President for Development & Campaign Director, Ashlyn led the planning, leadership, and public phases of Gettysburg's \$150 million campaign, working closely with the president and board of trustees. Her move back to Johns Hopkins as Senior Director of Development for the Department of Medicine and the Heart & Vascular Institute in 2015 took her career full circle back to working in health care with grateful patients during the Rising to the Challenge Campaign. In 2018, she accepted a newly created role to work closely with Donor and Volunteer Engagement, Special Events, and Donor Communications and to begin planning for the institution's next campaign. She is an active speaker and writer in the field and loves to mentor newcomers to development.

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

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

February 24 - 26, 2020 | Salt Lake City, UT

Hotel:

Salt Lake City Marriott University Park

480 Wakara Way

Salt Lake City, UT 84108

(801) 581-1000

Room rate:

\$140 plus tax.

Room block dates:

The nights of February 23, 24, and 25, 2020.

Room block cutoff date:

February 3, 2020.

Reserve Your Room: Please call (801) 581-1000 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