ACADEMIC IMPRESSIONS

CONFERENCE

FRONTLINE FUNDRAISERS AND PROSPECT RESEARCH: STRATEGIES TO FORGE A PRODUCTIVE PARTNERSHIP

November 6 - 7, 2019 | Chicago, IL

Start forming a more constructive partnership between frontline fundraisers and prospect research.

OVERVIEW

The best advancement shops know that fundraising is both an art and a science. Frontline fundraisers and prospect researchers each bring vital information to the table, but we often lack the strategies to form a synergistic partnership between the two, which means we risk leaving money on the table. If we fail to align our goals from the outset and establish touch points with two-way communication, we fail to optimize our fundraising results. A trusted and strategic partnership is key to a balanced and productive approach to increasing dollars.

Join us to learn how frontline fundraisers and prospect research can meet more institutional goals together. Teams will gain strategies to work together to prioritize large portfolios, clean up a portfolio that has not yielded results, gather information for more productive donor visits, move donors along the pipeline, and better manage each team's time and processes.

This conference celebrates and amplifies the value of each team. You will leave with tools, strategies, and resources to support the partnership and meet more strategic goals:

- Portfolio maintenance worksheet
- Sample prospect management policy
- A list of key metrics to track
- Models for successful meetings between prospect researchers and frontline fundraisers

OVERVIEW

Teams of frontline fundraisers and prospect researchers or managers are highly encouraged to attend together. Those who manage either team will leave with new tools to build valuable partnerships within the shop and assist staff in using their portfolio as a tool for success.

Even if you do not come with a team member, frontline fundraisers and prospect researchers will gain new strategies to build more productive partnerships.

BRING YOUR TEAM AND SAVE!

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

AGENDA

Day 1

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

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

The Value of Partnership: Balancing the Art and Science of Fundraising
9:30 - 10:15 a.m.

In this session, we will start unpacking the benefits of an effective partnership and answer the following questions:

- What do frontline fundraisers and prospect researchers each bring to the table?
- Why is partnership is key to institutional portfolio health?
- How does my portfolio fit into the institutional goals?

Morning Break
10:15 – 10:30 a.m.

Sharing and Aligning Goals
10:30 – 11:30 a.m.

No matter how your shop is structured, you will learn strategies for how to best align goals and expectations:

- Goal setting and alignment
- Creating/assigning portfolios
- Latest thinking on portfolio size
- Who decides who is moving prospects in and out
- Qualification

You will also be armed with the information necessary to make the case for downsizing and shrinking your portfolio or keeping a smaller portfolio.

Lunch (included in registration fee)
11:30 a.m. – 12:30 p.m.

AGENDA

Day 1 (CONTINUED)

Moves Management

12:30 – 2:30 p.m.

Too often, gift officers get stuck in donor transitions—unable to smoothly move prospects through cultivation, solicitation, and stewardship, and subsequently upgrade them to the next giving level. How can prospect research help provide the right information at the right moment and help solve specific challenges? We will focus on:

- Considerations for using data to guide strategy
- Partnering to focus on the most critical parts of your portfolio
- 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.

Developing a Prospect and Donor Strategy

2:45 – 4:15 p.m.

Here we will talk through how to collaboratively build a strategy and timeline for your best donors and prospects. There will be time to work on plans for a few of your current prospects.

Networking Reception (included in registration fee)

4:15 – 5:15 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.

AGENDA

Day 2

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

Routine Maintenance and Ongoing Portfolio Assessment
9:00 – 9:45 a.m.

In this session, you will learn key strategies for better prioritizing each team's time, gain tips on developing a regular portfolio maintenance schedule and routine together, and learn to set realistic goals. You'll receive:

- Tactics for handling check-ins
- Models for successful shared meetings

Morning Break
9:45 – 10:00 a.m.

Developing Successful Partnerships
10:00 – 11:00 a.m.

Frontline fundraisers will learn how prospect research and prospect management teams can be the finest partners in organizing a frontline fundraiser's portfolio and managing leads. Prospect researchers will learn how to gain their colleagues' confidence in the data and effective reporting techniques that will serve their cause and drive solicitations.

Action Planning
11:00 – 11:30 a.m.

In this working session, you will audit your current relationship and identify gaps and strengths to build on:

- Identify gaps or weaknesses in your current partnership and create an action plan
- Work together to plan (if you come with a team)
- Create an action plan to forge a meaningful partnership

Final Q&A and Evaluations
11:30 a.m. – 12:00 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.

James Vermillion

Director of Donor Strategy, UC San Diego

James is a member of the University Development (UD) leadership team at UC San Diego. In his role, he helps ensure significant levels of philanthropic support for the eight academic divisions that comprise general campus by managing and driving UD's $1M+ gift pipeline and helping inform strategic direction in partnership with key Advancement partners. He is accountable for utilizing statistical analysis tools to analyze growth trends and forecast program future direction. In addition, a portion of his time is dedicated to front line fundraising. James is a creative, analytical and strategic thinker with the ability to mobilize information, build relationships as well as advise and execute program growth, assessment and refinement.

James currently serves as the Southern California Regional Chair on the California Advancement Researchers Association (CARA) board of directors; previously serving as president, president-elect, and treasurer. He has also shared is expertise in prospect development as a speaker for CARA, the Association of Professional Researcher, the Association of Fundraising Professional San Diego Chapter, and the Association for Healthcare Philanthropy.

ACADEMIC IMPRESSIONS STAFF

Brittany Iwaszkiw

Program Manager, Academic Impressions, brittany@academicimpressions.com

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

November 6 - 7, 2019 | Chicago, IL

Hotel:

Wyndham Grand Chicago Riverfront

71 East Wacker Dr.

Chicago, IL 60601

312-346-7100

Room rate:

$189 + tax

Room block dates:

The nights of October 15, 2019.

Room block cutoff date:

November 12, 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