

# REVITALIZING YOUR DONOR RELATIONS PROGRAM

November 20-22, 2019 | Baltimore, MD



S P O N S O R

**THANKVIEW**

## *Improve the effectiveness of your stewardship efforts.*

Develop a comprehensive donor relations strategy for each of your donor segments to improve the effectiveness of your recognition, engagement, and cultivation efforts. This conference will allow you to explore the four pillars of a sound donor relations strategy and help you:

- Assess strengths and weaknesses of your current program
- Combat challenges faced when writing to donors
- Leverage data and reports to inform stewardship activities
- Develop a plan that is scaled to your institution

This program is facilitated by donor relations experts Angela Joens (University of California Davis), Sarah Simms (University of Florida), and Lynne Wester (Donor Relations Guru).

## ONE OF AI'S BEST RATED EVENTS

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*"This conference provided a great balance of big picture strategy and actionable details I can take back for immediate impact."*

*"Thank you, faculty! Wow! The knowledge and expertise shared and openly given is so amazing. Academic Impressions conferences are where growth and impact occur."*

*"Being new in the field of Fundraising, Donor Relations, and Stewardship, I have really learned industry best practices to remain ahead of the trend."*

*"This is the best conference I've been to in my years in Donor Relations. I appreciate the smaller attendee size and the more in-depth discussions. It's nice not to have to choose between two sessions because they occur at the same time. I feel fully equipped to tackle my stewardship challenges head-on. Couldn't recommend a better conference."*

*This event is designed for those who need to breathe new life into their donor relations programs. Come learn from our expert instructors and walk away with actionable items that can be implemented immediately.*

## FULL-DAY PRE-CONFERENCE WORKSHOP: THE FOUNDATIONS OF DONOR RELATIONS

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If you are new to donor relations, we strongly encourage you to attend this full-day workshop. You will learn the foundations for a successful donor relations program and examine the four key pillars of donor relations:

- Stewardship and Impact Reporting
- Acknowledgements
- Donor Recognition
- Events and Engagement

You will leave this pre-conference workshop equipped with best practices to leverage in your everyday work.

## WHO SHOULD ATTEND

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Advancement professionals and teams looking to build or revamp their donor relations program cannot miss this conference. Our expert instructors will provide useful advice and industry insight, whether you are new to the field or have worked in advancement for several years. Sending a team? Check the registration row below to see details on teams discounts!

# AGENDA

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## Day 1

### **Pre-Conference Workshop: The Foundations of Donor Relations (breakfast and lunch included in registration fee)**

*8:30 a.m. - 5:00 p.m.*

The donor relations field has grown and evolved tremendously over the last few years. If you are new to the field, this one-day pre-conference workshop will provide you with the foundations of a sound donor relations program. Highlighting the four key pillars of donor relations, there will be sessions covering:

- Stewardship and Impact Reporting
- Acknowledgements
- Donor Recognition
- Events and Engagement

You will leave this pre-conference workshop equipped with best practices to leverage in your everyday work and the foundational knowledge to get the most out of the main conference.

## Day 2

### **Conference 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 Four Pillars of Donor Relations**

*9:30 - 10:15 a.m.*

Recapping the pre-conference workshop, this opening lecture will outline the critical components of a sound donor relations program: stewardship and impact reporting, acknowledgements, donor recognition, and events and engagement.

### **Morning Break**

*10:15 - 10:30 a.m.*

# AGENDA

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## **Day 2 (CONTINUED)**

### **Assessing Your Donor Relations Operations**

10:30 a.m. - 12:00 p.m.

This working session will allow you to explore and document the strengths and weaknesses of your existing stewardship strategy. Considering your relationships with your entire advancement shop and the four pillars of a sound donor relations program, you will work through an audit of your current donor relations practices to assess what you are doing well and identify where you can improve and implement change.

#### **Resources include:**

- Donor Relations Program Audit
- Endowed Funds Audit Glossary

### **Lunch (included in registration fee)**

12:00 - 1:00 p.m.

### **Writing for Donor Relations**

1:00 - 2:00 p.m.

In a combination of lecture and working time, this hour will equip you with examples of successful strategies to combat the challenges that donor relations professionals face when writing to donors, such as:

- Writing in someone else's voice (e.g., president, vice president, etc.)
- Multiple acknowledgment letters to the same donor from different people
- Working with institutions' communications groups
- Varying your writing style based on communication method and outlet

### **Gift Agreement and Fund Stewardship Best Practices**

2:00 - 3:00 p.m.

This hour will focus on the basic, but often overlooked, tenants of stewardship – crafting solid gift agreements, ensuring donor intent is honored, and ensuring maximum fund utilization. Our faculty will explore how we tackle this complex issue internally within your organization through identifying key partners and data needs as well as the role Donor Relations professionals play in this arena. This key topic must be addressed before future asks, compelling reporting, and targeted engagement can take place.

### **Afternoon Break**

3:00 - 3:15 p.m.

### **Behavior-Based Donor Relations**

3:15 - 4:30 p.m.

Donor retention should be one of your core metrics as a donor relations professional. But, do you understand how to segment and scale your donor relations strategy for your annual donors? You will learn why this group of donors is vitally important and how to partner with your annual giving counterparts to ensure they are appropriately recognized. Specifically, strategies will cover appropriate recognition and engagement through events and targeted communications.

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

4:30 - 5:30 p.m.

# AGENDA

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## Day 3

### Continental Breakfast Roundtable Discussions (included in registration fee)

8:30 - 9:00 a.m.

### Fund Reporting

9:00 - 10:30 a.m.

Reporting on scholarships and other endowed funds is an essential function to do well. And, developing creative reports that deliver information to donors beyond that traditional means is where we want to head. This session will walk you through the latest and greatest reporting tactics that involve campus partners and better engage donors.

### Morning Break

10:30 - 10:45 a.m.

### Donor Relations for Top Donors

10:45 a.m. - 12:15 p.m.

This session will focus exclusively on donor relations strategy for your institution's top donors. These donors represent less than 10% of your supporters but contribute to more than 90% of your gifts. Our expert facilitators will share a framework for:

- Engaging top donors through events
- Communicating with these top donors
- Developing an ongoing engagement strategy
- Creating customized stewardship plans

### Lunch (included in registration fee)

12:15 - 1:30 p.m.

### Leveraging Technology for the Four Pillars

1:30 - 2:30 p.m.

Now that you know how to develop your efforts across your donor populations, we will guide you through using the technology and systems at your disposal to better systemize and complete your stewardship and donor relations plans.

### Afternoon Break

2:30 - 2:45 p.m.

### Keys to Success in Revitalizing Your Effort

2:45 - 3:30 p.m.

You are now armed with an audit of your current shop and many good ideas to implement, but now what? Whether it is building better relationships across campus (e.g., marketing, financial aid, faculty, etc.), developing buy-in, or managing up within your organization, this session will help you put together everything you have learned and develop an implementation plan for when you head back office – armed and ready for exciting growth and change!

### Final Faculty Q&A, Conference Wrap-Up, and Evaluation

3:30 - 4:00 p.m.

## INSTRUCTORS

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### Angie Joens

#### Assistant 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. 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 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.

### Sarah Sims

#### Executive Director of Donor Relations, University of Florida

Sarah has been responsible for building new and innovative donor relations programs from the ground up at three different higher education institutions and now heads the donor relations team at the University of Florida as they embark on the University's first \$3B capital campaign.

With more than ten years of experience in donor relations and frontline fundraising in a variety of higher education and non-profit settings, Sarah focuses on building strategic donor relationships while forwarding the mission of the organization. Her specialty areas include top donor strategy, program development, fund stewardship and major gift development.

Sarah is a non-profit consultant and active industry volunteer with positions held on the CASE IV Board of Directors and with the Association of Donor Relations Professionals. Sarah earned her Certified Fundraising Executive (CFRE) in 2013 and is a frequent presenter for CASE, ADRP, DRG, and Academic Impressions.

### 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

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### **Gwen Doyle Herbert**

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

Gwen is a senior program manager for our program development team. In her role, she oversees a team of program managers, and produces programming across several of our domains, with extensive experience in advancement and alumni relations. Prior to joining AI, Gwen worked for George Washington University in finance and project management for their Academic Technologies team, as well for an organization that used Washington D.C. as a living classroom to develop the country's high achieving youth through experiential education. She also enjoys serving her communities, and was the volunteer coordinator for Miriam's Kitchen, and on the Board of Directors for Break Away. Gwen is a proud alumnus of Cornell University.



## LOCATION

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***November 20-22, 2019 | Baltimore, MD***

***Hotel:***

Hyatt Regency Baltimore  
300 Light St.  
Baltimore, MD 21202  
410-528-1234

**Room rate:**

\$179 + tax

**Room block dates:**

The nights of November 19, 20, and 21, 2019.

**Room block cutoff date:**

October 28, 2019.

Reserve Your Room: Please call 410-528-1234 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