ACADEMIC IMPRESSIONS

CONFERENCE

DONOR RELATIONS: ENGAGING AND STEWARDING YOUR TOP DONORS

February 18 - 19, 2020 | Savannah, GA

Craft personalized stewardship plans for your highest-level donors in order to increase engagement and future giving.

OVERVIEW

Intentionally stewarding top donors is becoming increasingly important as their contributions account for a larger and larger percentage of an institution's philanthropic gifts. Learning and leveraging unique information about your donors is a proven strategy to create meaningful moments, to ensure future engagement, and to encourage subsequent gifts.

Join us for a highly interactive learning experience to discover how you can start fostering individualized relationships and crafting personalized stewardship plans. You'll also learn how to strengthen your relationships with major and principal donors utilizing important considerations in communication, recognition, and documentation. Our expert faculty will present a stewardship plan template that will enable you to create a customized engagement strategy for any of your top donors.

This conference will also provide an intimate opportunity to connect and collaborate with your peers from across the United States and Canada.

COME WITH A TOP-LEVEL DONOR IN MIND

As part of this conference, we will facilitate a working session where our experts will coach you through the creation of a personalized stewardship plan for the specific donor(s) you are looking to develop. This program will be most valuable if you have a specific high-level donor in mind whom you wish to cultivate, solicit, and steward.

OPTIONAL POST-CONFERENCE WORKSHOP: PARTNERING WITH GIFT OFFICERS ON DONOR RELATIONS EFFORTS

Setting a vision and strategy for how to honor your most important donors is a great starting place, but without the ability to partner and collaborate, even the best laid plans can fail. In this post-conference workshop, our faculty will talk about positioning yourself as an ally and partnering with gift officers to make this work successful. You will have time to think through critical next steps in your stewardship plan developed during the conference, learn how to prioritize relationships, and avoid common pitfalls.

WHO SHOULD ATTEND

This conference will benefit those working with donors who want to better steward larger gifts and help lay the framework for future giving. This may include professionals from donor relations, major or principal gifts, and/or advancement leadership. We highly recommend attending as a team in order to get on the same page and establish a shared understanding of top-donor stewardship within the department. Please come with a top-level donor in mind whom you wish to steward.

BRING YOUR TEAM AND SAVE!

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

AGENDA

Day 1

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

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

Defining Top Stewardship and Engagement
9:30 - 10:30 a.m.

Top donor amounts look different from campus-to-campus, so we will start by taking a comprehensive look at how each institution is defining what it means to be a top donor. Once we have identified who these donors are, we will review how to frame and think about stewardship with intention and thoughtfulness. We'll look at who is responsible for these efforts on your campus and what it takes to steward these donors in a way that is meaningful to them.

Morning Break
10:30 - 10:45 a.m.

Crafting Personalized Stewardship Plans
10:45 – 11:30 a.m.

When it comes to stewarding top donors, it is increasingly important that their stewardship plans are unique and personalized with their needs and style in mind. We will begin this process by considering the intentional framework upon which each component is built. We will work through how to structure your stewardship plans and provide an example format for creating a personalized plan.

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

Using your Database to Track Individual Engagement Plans
12:30 – 1:30 p.m.

Now that you have your plan and ideas, we will discuss how you can document data in a way that is accessible and helpful for your organization. Our faculty will present questions that can engage donors and talk about documenting this information in your database so you can strategically track and align their donor experience. We will also discuss ways to pull data for reporting needs more easily.

AGENDA

Day 1 (CONTINUED)

Communication and Reporting to Your Top Donors

1:30– 2:30 p.m.

From invitations to campus events and donor reports, your communication is critical with top donors. Our faculty will talk through examples of effective communication strategies and provide sample communications materials. We will also discuss considerations around frequency and timing of correspondence, as well as providing on-going updates and systemizing institutional happenings. We will provide a sample, discuss timelines, and consider recommendations for outreach and following up.

Afternoon Break

2:30 – 2:45 p.m.

Communication Working Session

2:45- 3:30 p.m.

In this working session, we will build upon what you've learned from the previous session. This is an opportunity for our experts to offer feedback and suggestions around the samples you bring to the conference, as well as current publications and donor correspondence coming from your office.

Recognizing and Engaging Your Donors

3:30 - 5:00 p.m.

Recognizing and engaging your donors is all about the details that "wow" and inspire. Our faculty will talk through the importance of providing intentional opportunities for donors to engage and being thoughtful about the ways donors are recognized. You'll receive examples of how to acknowledge and engage your donors at the highest level, including but not limited to: volunteerism, tokens of appreciation, giving societies, and more.

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

Day 2

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

Working Session: Creating Your Stewardship Plan
9:00 – 9:45 a.m.

During this working session you will have the opportunity to create a personalized stewardship plan for a donor of your choice, based on what you've learned so far. You will have the chance to receive consultation and personalized advice from our expert panel.

Morning Break
9:45 - 10:00 a.m.

Measuring Success
10:00 – 11:00 a.m.

Now that you have your plan, and it has been added to your database, we will discuss how you can measure success in a way that is accessible and helpful for your organization. Our faculty will talk through ways to tell the story of your metrics and measure the work you and your team are doing around individualized stewardship.

Closing Comments and Evaluations
11:00 – 11:30 p.m.

Lunch (included in post-conference workshop registration fee)
11:30 p.m. - 12:30 p.m.

Post Conference Workshop: Partnering with Gift Officers on Donor Relations Efforts
12:30 – 3:30 p.m.

Setting a vision and strategy for how to honor your most important donors is a great starting place, but without the ability to partner and collaborate, even the best laid plans can fail. In this post-conference workshop, our faculty will talk about positioning yourself as an ally and partnering with gift officers to make this work successful. You will have time to think through critical next steps in your stewardship plan developed during the conference, learn how to prioritize relationships, and avoid common pitfalls.

INSTRUCTORS

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.

Sarah Sims, CFRE

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.

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 18 - 19, 2020 | Savannah, GA

Hotel:

Hyatt Regency Savannah

2 West Bay Street

Savannah, GA 31401

912-721-4677

Room rate:

$169 + tax

Room block dates:

The nights of February 17 and 18, 2020.

Room block cutoff date:

January 27, 2020.

Reserve Your Room: Please call 912-721-4677 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