

FRONTLINE FUNDRAISING: ESSENTIALS OF GIFT SOLICITATION

July 7 – 8, 2020 | Atlanta, GA



Discover how to more confidently solicit prospects and donors.

OVERVIEW

Set yourself up for greater fundraising success. This highly interactive conference is designed to quickly train you and your team to prepare for the responsibilities of frontline fundraising. This program is a great fit for all levels, including if you're starting your fundraising career or looking to rigorously enhance current practices. This workshop:

- *Immediately* impacts fundraising results;
- Provides a more strategic and successful approach to identifying prospects and cultivating donors; and
- Is highly practical and skills-based and can get those new to philanthropy and frontline fundraisers up-to-speed fast.

GREAT FIT FOR ALL SKILL LEVELS

This material is beneficial for both new and experienced frontline fundraisers, as well as academic leaders and fundraising volunteers who want to improve or refresh solicitation skills. Whether you focus on annual giving, major giving, principal giving, or planned giving you will leave with increased confidence in your calls, visits, asks, and portfolio management skills.

AGENDA

DAY 1

Conference Registration and Continental Breakfast (included in the registration fee)

8:30 - 9:00 a.m.

Opening Comments and Introductions

9:00 - 9:30 a.m.

Preparing for Fundraising Success

9:30 - 10:45 a.m.

We will detail current industry trends, how to best plan your calls and visits by utilizing the following tactics:

- Matching a prospect's interests to your institution
- Engaging and involving the prospect
- Determining the proper ask amount, project type, and interest area
- Preparing for the ask with "the five W's"

Morning Break

10:45 - 11:00 a.m.

Making the Initial Outreach and Managing Donor Visits

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

The initial outreach you make on the phone, or through other means, will establish the tone for your ongoing interactions with your prospect, making it one of the most crucial points in the philanthropic process. This session will cover:

- What information you need to make a successful first outreach
- Tips for securing an initial appointment, including moving through gatekeepers
- Phone call scripting and planning your calls
- Managing conversations and transitioning them to be most effective
- Conversations that lead to productive visits

Lunch (included in registration fee)

12:30 - 1:30 p.m.

Making the Initial Outreach and Managing Donor Visits (cont.)

1:30 - 3:45 p.m.

The previous session will resume with content and will include time for role playing and practical application.

AGENDA

DAY 1 (CONTINUED)

Afternoon Break

3:45 - 4:00 p.m.

Probing Questions

4:00 - 5:00 p.m.

Once you have mastered the cold call and understand how to lead productive visits, you will learn how to deepen your inquiry and go from good meetings to great, by asking probing questions, you will gain strategies for adding rigor to your visits and maximize your fundraising time and effort. This session will share tactical resources as well as allow time for role playing the learning.

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.

DAY 2

Continental Breakfast (included in the registration fee)

8:30 - 9:00 a.m.

Portfolio Management

9:00 - 10:15 p.m.

Once you have mastered the cold call and understand how to lead productive visits, you will learn how to identify top prospects from a sample portfolio using our expert facilitator's techniques. Just as critical as uncovering your top prospects, you will gain strategies to remove inactive leads from the portfolio to better focus your fundraising time and effort.

Morning Break

10:15 - 10:30 a.m.

AGENDA

DAY 2 (CONTINUED)

Making the Ask

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

Making a compelling ask and closing a solicitation are often the most daunting and stressful moments in the career of a fundraiser. The ask must be framed in a way that compels your donor to jump into action and support your institution. In this interactive session, you will practice the intricacies of making the ask. Learn how to:

- Use the cultivation process to naturally build to the ask
- Create a conducive environment for a successful ask
- Script and role-play to move the process forward

Lunch (included in the registration fee)

12:00 - 1:00 p.m.

Making the Ask Continued

1:00 - 2:30 p.m.

The previous session will resume with content and will include time for role playing and practical application.

Afternoon Break

2:30 - 2:45 p.m.

Action Planning

2:45 - 3:00 p.m.

In this final session, you will assess and synthesize the strategies and practices worked on over the previous two days, outlining your key takeaways and new techniques that you will be able to implement.

Final Q&A, Closing Comments, and Evaluations

3:00 - 3:30 p.m.

INSTRUCTORS

Kathy Drucquer Duff, CFRE

Coach, Consultant, and Optimizer, KDD Philanthropy

Kathy is an executive advancement officer with over 25 years of experience helping non-profits and institutions transform the way they practice philanthropy. Kathy provides this expertise from her experience in higher education and healthcare, 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.

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

July 7 - 8, 2020 | Atlanta, GA

Hotel:

Grand Hyatt Atlanta

3300 Peachtree Rd. NE

Atlanta, GA 30305

404-237-1234

Room rate:

\$219 + tax

Room block dates:

The nights of July 6 and 7, 2020.

Room block cutoff date:

June 15, 2020.

Reserve Your Room: Please call 404-237-1234 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**