



# Advancement Content Summary

With membership, you'll get access to the following types of content:

## Live & Recorded Webcasts

**Average time to impact: 60 minutes**

Leadership webcasts, whether live or recorded, are always available to our leadership members for free. You'll always get access to presentation materials and any supplemental resources.

## Short Lessons & Quizzes

**Average time to impact: 20 minutes**

Our short lessons are self-paced. They include videos, quizzes, and downloadable job aids to support action.

## Articles & Reports

**Average time to impact: 10 minutes**

These short pieces are written in collaboration with industry experts.

## Job Aids & Printables

**Average time to impact: 5 minutes**

Job Aids & Printables are ready-to-use tools.



## Academic Fundraising

1. Building a Custom Corporate Training Plan
2. Building a Faculty and Staff Giving Campaign
3. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
4. Engaging Faculty to Improve Corporate Relations
5. Advancement 101: A Six-Part Series
6. Fundraising and Sexual Harassment: Documenting Effective Procedures
7. Fundraising for New Department Chairs
8. Increasing Board Engagement in Fundraising
9. Increasing Faculty Engagement in Advancement
10. Partner with Faculty to Maximize Private Funding Opportunities
11. Writing Workshop for Advancement Professionals: Sessions 1 & 2

## Advancement Services and Operations

1. 5 Steps to Mitigate Risk in Your Alumni Volunteer Programs
2. A Practical Approach to Fundraising Ethics
3. Accurately Reporting for the CASE Campaign and VSE Surveys
4. Advancement 101: A Six-Part Series
5. Advancement FASB Fund Accounting and Reporting
6. AI Pro Chats – Improving Front and Back Office Relations
7. Auditing to Ensure Institutional Compliance
8. Campaigns: Staffing, Training, and Supporting Frontline Fundraisers
9. Capacity Modeling
10. Creating Customized Impact Reports
11. Daily, Weekly, and Monthly Strategies to Better Manage Your Portfolio
12. Developing Gift Acceptance Policies
13. Develop Your Impact Reporting Strategy
14. Developing Rigor in Your Fundraising Team
15. Effective Gift Agreements: Documenting Donor Intent
16. Engagement Modeling
17. Essential Reports for Donor Relations
18. Establishing a Culture of Talent Development for your Frontline Fundraisers
19. Establishing a Data Governance Committee in Advancement
20. FERPA for Advancement: Train Your Whole Shop
21. Gift Processing and Stewardship (Launching a Giving Day)
22. Growing Your International Alumni Program
23. Habits of Highly Effective Higher-Ed Professionals
24. Habits of Highly Effective Higher-Ed Professionals, Part 2: Finding Your Purpose
25. Implementing an Alumni Engagement Scoring Model
26. Implementing Engagement and Capacity Models
27. Introduction to Advancement Services



28. Key Considerations for Institutional Naming Plans and Policies: Valuing Your Naming Opportunities
29. Key Considerations for Institutional Naming Plans and Policies: Updating Your Naming Rights Policies
30. Leveraging Metrics to Improve Advancement Events
31. Managing a Changing Fundraising Environment: Remote Teams, Skeptical Donors and an Uncertain Landscape
32. The Naming Opportunities Plan and Donor Stewardship
33. PCI DSS Compliance in Advancement: Update for 3.2
34. Performance Metrics for Prospect Research and Management Staff
35. Planning and Executing
36. Predictive Modeling 101 for Advancement Professionals
37. Prospecting Using Social Media
38. Recruiting and Retaining a Talented Advancement Team
39. Rethinking Donor Recognition Programs
40. Student Affairs Fundraising: Building a Sustainable Structure
41. Tools for Increasing Fundraising Effectiveness and Efficiency
42. Training for Advancement: Assess Your Data Integrity and Establish Data Cleaning Priorities
43. U.S. News: Accurately Calculating and Reporting Your Alumni Participation Numbers

## Alumni Relations

1. 5 Steps to Boost Your Alumni Volunteer Engagement
2. 5 Steps to Mitigate Risk in Your Alumni Volunteer Programs
3. A Multi-Channel Approach to Young Alumni Giving Communications
4. A New Approach: Distributed Content Strategy in Higher Ed Marketing
5. Advancement 101: A Six-Part Series
6. Affinity-Based Programming and Giving
7. Alumni Affinity Groups: How One University Formed a Highly Successful Organization
8. Alumni Career Services: Developing an Online Programming Series
9. Alumni Relations and Advancement Innovators: University of Notre Dame
10. Alumni Surveys: Designing, Deploying, and Analyzing Responses
11. An Introduction to Advancement Event Protocol and Etiquette
12. Building a Comprehensive Alumni Awards Program
13. Building an Alumni Career Services Program in Advancement
14. Capital Campaigns: Integrating Student Involvement
15. Collaborating with Campus Partners to Expand Volunteer Opportunities
16. Commencement: Engaging Students as Future Alumni
17. Communicate with Young Alumni Across Multiple Channels
18. Create an Alumni Volunteer Experience that Fosters Life-Long Engagement with Your Institution
  - 1: Rethinking Your Alumni Volunteer Recruitment Philosophy
  - 2: Alumni Volunteer Onboarding: The Beginning of Life-Long Engagement



- 3: Recognizing Your Alumni Volunteers in Meaningful Ways
- 4: Alumni Volunteer Management: Answers from the Experts (Members-only)
19. Creating a Meaningful Volunteer Experience
20. Cultivating a Team of Student Development Officers
21. Customizing Donor Communication through Smarter Segmentation
22. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
23. Developing an In-Depth Alumni Mentoring Program
24. Developing Successful Student Philanthropy Events
25. Effective Student Foundations and Student Alumni Associations
26. Effective Volunteer Management
27. Engaging Women in Philanthropy: Practical Ways to Shift Our Approach
28. Facebook for Donor and Alumni Engagement
29. Fundamentals of Fundraising for Diverse Student Groups on Campus
30. Fundraising and Sexual Harassment: Documenting Effective Procedures
31. Global Considerations for a Modern Campaign
32. Growing Your International Alumni Program
33. How to Develop Programming that Re-Engages Underrepresented Alumni
34. Implementing an Alumni Engagement Scoring Model
35. Increasing Board Engagement in Fundraising
36. Increase Engagement and Giving Through a Selective Alumni-Student Mentoring Program
37. Instagram for Donor and Alumni Engagement
38. Integrating Effective Mentorship into Campus Culture: A Success Story
39. Introduction to Alumni Relations
40. Leveraging Alumni Interviews in the Admissions Process: A Case Study from the University of Pennsylvania
41. Leveraging Metrics to Improve Advancement Events
42. LinkedIn for Donor and Alumni Engagement
43. Measuring and Evaluating Your Alumni Relations Programs
44. More than Dollars: How Many Opportunities are You Missing with Your Alumni?
45. Partnering Giving and Alumni Relations to Better Align Efforts
46. Planning an Alumni-Centered Reunion
47. Reengage Your Lost Black Alumni
48. Reimagining Giving and Recognition Societies - a 2-part series
49. Reunion Volunteer Management and Giving Structures
50. Revitalizing Your Student Foundation Program
51. Snapchat for Donor and Alumni Engagement
52. Starting a Corporate Alumni Chapter Program
53. Strategically Managing Alumni Chapters
54. Strategies to Improve International Alumni Engagement
55. Strategies to Improve the Effectiveness of Your Volunteer Program
56. Strategies to Improve the Effectiveness of Your Young Alumni Volunteer Program



57. Student Philanthropy Programs that Encourage Alumni Giving: A Success Story
58. Successful Young Alumni Programming
59. Tailoring Programming for Unengaged Professional and Graduate School Alumni
60. Transition Programming: From Student to Alumni Professional
61. Twitter for Donor and Alumni Engagement
62. Using a Volunteer Framework to Increase Faculty Involvement with Alumni Engagement
63. Using Social Media Creatively to Increase Donor and Alumni Engagement
64. Using the Net Promoter® System in Alumni Relations
65. What if an Alum Generated \$200,000 for Your Institution, Without Writing a Check?
66. Writing Workshop for Advancement Professionals: Sessions 1 & 2
67. Youtube for Donor and Alumni Engagement

## Annual Giving

1. A Multi-Channel Approach to Young Alumni Giving Communications
2. Advancement 101: A Six-Part Series
3. Affinity-Based Programming and Giving
4. Analyzing Your Data
5. Annual Giving Solicitations in Higher Ed: A Collection of Samples to Inspire Your Next Appeal
6. Annual Giving: Integrating Email with Your Overall Strategy
7. Anticipating and Overcoming Objections in Frontline Fundraising
8. Athletics Fundraising: Direct Mail Strategy
9. Auditing Your Annual Giving Operations
10. Branding and Marketing Your Leadership Annual Giving Program
11. Building a Faculty and Staff Giving Campaign
12. Building the Infrastructure for a Culture of Philanthropy in the Digital World
13. Checklist: Questions the Governing Board Must Ask Before Launching a Fundraising Campaign
14. Collaborating with Campus Partners to Expand Volunteer Opportunities
15. Communicate with Young Alumni Across Multiple Channels
16. Create an Alumni Volunteer Experience that Fosters Life-Long Engagement with Your Institution
  - 1: Rethinking Your Alumni Volunteer Recruitment Philosophy
  - 2: Alumni Volunteer Onboarding: The Beginning of Life-Long Engagement
  - 3: Recognizing Your Alumni Volunteers in Meaningful Ways
  - 4: Alumni Volunteer Management: Answers from the Experts (Members-only)
17. Creating a Meaningful Volunteer Experience
18. Creating Giving Circles to Increase Annual Giving
19. Cultivating a Team of Student Development Officers
20. Customizing Donor Communication through Smarter Segmentation
21. Data Analysis and Segmentation
22. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
23. Developing Successful Student Philanthropy Events
24. Developing Your Parent Giving Strategy



25. Direct Mail: Back to Basics
26. Effective Student Foundations and Student Alumni Associations
27. Effective Volunteer Management
28. Elevating Your Parent Giving Program
29. Engaging Women in Philanthropy: Practical Ways to Shift Our Approach
30. Establishing a Data Governance Committee in Advancement
31. Facebook for Donor and Alumni Engagement
32. Frontline Fundraising: Essentials of Gift Solicitation
33. Fundamentals of Fundraising for Diverse Student Groups on Campus
34. Fundraising and Sexual Harassment: Documenting Effective Procedures
35. Gift Processing and Stewardship
36. Growing Your International Alumni Program
37. Hiring and Training Student Callers
38. Identifying and Applying Metrics that Matter in Annual Giving
39. Increase Engagement and Giving Through a Selective Alumni-Student Mentoring Program
40. Instagram for Donor and Alumni Engagement
41. Integrating Annual Giving into Campaigns
42. Integrating Social Media with Traditional Solicitation Channels
43. Introduction to Annual Giving
44. Launching a Crowdfunding Initiative
45. LinkedIn for Donor and Alumni Engagement
46. Making the Case for a Data-Driven Strategy
47. Managing Annual Fund Volunteers
48. Measuring and Evaluating Your Annual Giving Staff
49. More than Dollars: How Many Opportunities are You Missing with Your Alumni?
50. The Naming Opportunities Plan and Donor Stewardship
51. Ongoing Phonathon Management and Fulfillment
52. Optimizing Your Online Giving Site
53. Parent Giving: Cultivating Leadership Donors with a Board and Committee Structure
54. Partnering Giving and Alumni Relations to Better Align Efforts
55. Perspectives on Annual Giving Amid COVID-19
56. Planning and Executing
57. Recurring Gifts: Strategies to Grow Your Program
58. Reengage Your Lost Black Alumni
59. Refocus Your Annual Giving Strategy: Find Opportunities in a Crisis
60. Reimagining Giving and Recognition Societies - a 2-part series
61. Rethinking Faculty and Staff Giving
62. Revitalizing Your Student Foundation Program
63. Running a Meaningful Senior Campaign
64. Scripting
65. Segmenting Your Populations



66. Snapchat for Donor and Alumni Engagement
67. Stewarding Your Annual Donors
68. Strategies to Improve the Effectiveness of Your Volunteer Program
69. Strategies to Improve the Effectiveness of Your Young Alumni Volunteer Program
70. Student Affairs Fundraising: Building a Sustainable Structure
71. Student Philanthropy Programs that Encourage Alumni Giving: A Success Story
72. Successful Young Alumni Programming
73. Transitioning Leadership Annual Donors to Major Donors
74. Twitter for Donor and Alumni Engagement
75. Uncovering More Planned Giving Prospects
76. Using Social Media Creatively to Increase Donor and Alumni Engagement
77. Using Surveys to Gather Additional Data
78. Why Donors Give: It's Not What You Think
79. Writing Workshop for Advancement Professionals: Sessions 1 & 2
80. Youtube for Donor and Alumni Engagement

## Corporate and Foundation Relations

1. Advanced Strategies for a Successful Corporate Campus Visit
2. Corporate Stewardship: Demonstrating ROI
3. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
4. Developing a Collaborative Metrics Structure for Stronger Corporate Engagement
5. Developing a Scorecard to Prioritize Your Corporate Partners for Holistic Engagement
6. Engaging Faculty to Improve Corporate Relations
7. Establishing a Revenue-Generating Corporate Engagement Program
8. Fundraising and Sexual Harassment: Documenting Effective Procedures
9. Measuring and Evaluating Corporate and Foundation Relations Staff
10. Partner with Faculty to Maximize Private Funding Opportunities
11. Proven Approaches to Building Corporate Engagement
12. Starting a Corporate Alumni Chapter Program
13. Using a Council to Establish a Holistic Corporate Engagement Strategy
14. Writing Workshop for Advancement Professionals: Sessions 1 & 2

## Donor Relations

1. Advancement 101: A Six-Part Series
2. AI PRO Chats: 3 Unique Donor Relations Tactics
3. An Introduction to Advancement Event Protocol and Etiquette
4. Corporate Stewardship: Demonstrating ROI
5. Crafting Personalized Stewardship Plans for Top Donors
6. Creating Customized Impact Reports
7. Customizing Donor Communication through Smarter Segmentation



8. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
9. Develop Your Impact Reporting Strategy
10. Donor Appreciation: Leveraging Existing Events
11. Donor Relations: Demonstrating ROI
12. Effective Gift Agreements: Documenting Donor Intent
13. Essential Reports for Donor Relations
14. Family Giving: Cultivating the Next Generation of Wealth
15. Fundraising and Sexual Harassment: Documenting Effective Procedures
16. Fundraising Essentials: Donor Relations for Frontline Fundraiser
17. How Donor Relations Can Improve Donor Retention
18. Industry Views: Advancement Shops of Tomorrow
19. Introduction to Donor Relations
20. Key Considerations for Institutional Naming Plans and Policies: Valuing Your Naming Opportunities
21. Key Considerations for Institutional Naming Plans and Policies: Updating Your Naming Rights Policies
22. Leveraging Metrics to Improve Advancement Events
23. Reimagining Giving and Recognition Societies - a 2-part series
24. Rethinking Donor Recognition Programs
25. Rethinking Strategy for Advancement Events
26. Small Events for Donor Cultivation
27. Stewarding Your Annual Donors
28. Stewarding Your Scholarship Donors: A Practical Approach
29. Stewardship Events and Donor Engagement
30. Strategic Communications and Impact Reporting
31. Strategic Partnerships with Donor Relations and Athletics
32. Using Surveys to Improve the Donor Experience
33. Writing Workshop for Advancement Professionals: Sessions 1 & 2

## Major and Planned Giving

1. A Practical Approach to Fundraising Ethics
2. A Practical Approach to Growing Your Planned Giving Program
3. Adapting Non-Profit Strategies for Higher Ed Fundraising Success
4. Advancement 101: A Six-Part Series
5. Advancement Events: Effectively Closing a Campaign
6. Advancement Events: Effectively Launching a Campaign
7. AI Pro Chats – Improving Front and Back Office Relations
8. An Introduction to Planned Giving
9. Anticipating and Overcoming Objections in Frontline Fundraising
10. Blended Gifts: Strategies to Increase Your Fundraising Success
11. Building Fundraising Partnerships with Athletic Directors





12. Campaigns: Staffing, Training, and Supporting Frontline Fundraisers
13. Capacity Modeling
14. Capital Campaigns: Integrating Student Involvement
15. Checklist: Questions the Governing Board Must Ask Before Launching a Fundraising Campaign
16. Crafting Personalized Stewardship Plans for Top Donors
17. Develop a Plan to Address Sexual Harassment from Alumni, Donors, and Prospects
18. Developing Rigor in Your Fundraising Team
19. Donor Conversations: What's Often Missing (and Needn't Be)
20. Effectively Onboard Major Gift Officers with a 90-Day Plan
21. Engagement Modeling
22. Engaging Leadership Volunteers for Fundraising Success
23. Engaging Women in Philanthropy: Practical Ways to Shift Our Approach
24. Establishing a Culture of Talent Development for your Frontline Fundraisers
25. Family Giving: Cultivating the Next Generation of Wealth
26. Five Key Components of a Successful Intrusive Advising Process
27. Frontline Fundraising: Essentials of Gift Solicitation
28. Frontline Fundraising Essentials: Outreach
29. Frontline Fundraising Essentials: Donor Qualification
30. Frontline Fundraising Essentials: Visits
31. Frontline Fundraising Essentials: Understanding Donor Motivation & the Ask
32. Frontline Fundraising in a Virtual Environment
33. Fundraising and Sexual Harassment: Documenting Effective Procedures
34. Fundraising Essentials: Donor Relations for Frontline Fundraiser
35. Fundraising Ethics: 10 Techniques for Working with Donors with Dementia
36. Fundraising for Law Schools
37. Global Considerations for a Modern Campaign
38. Hiring Non-Traditional Candidates for Your MGO Team: Navigating the Opportunity and the Risk
39. Implementing Engagement and Capacity Models
40. Increasing Board Engagement in Fundraising
41. Integrating Annual Giving into Campaigns
42. Introducing Blended Gifts to Donor Conversations
43. Introduction to Major Gifts
44. Introduction to Planned Giving
45. Managing a Changing Fundraising Environment: Remote Teams, Skeptical Donors and an Uncertain Landscape
46. Managing Your Portfolio for Greater Fundraising Success
47. Marketing Estate Planning Tools to Uncover Planned Giving Prospects
48. Marketing Your Planned Giving Program
49. Measuring and Evaluating Your Planned Giving Program
50. More than Dollars: How Many Opportunities are You Missing with Your Alumni?
51. Planned Giving Vehicles



52. Planned Giving: Using Student Callers
53. Planning and Managing Project-Based Fundraising
54. Recruiting and Retaining a Talented Advancement Team
55. Recruiting the Right Major Gift Officers
56. Regional Advancement Strategy: Investing in a Physical Presence
57. Retaining Your Major Gift Officers – From Day One
58. Small Events for Donor Cultivation
59. Soliciting Endowment Support
60. Stewardship Events and Donor Engagement
61. Strategic Communications and Impact Reporting
62. Strengthening Frontline Fundraising Efforts During Uncertainty
63. Tactics for Successful Donor Discovery and Qualification
64. Tools for Increasing Fundraising Effectiveness and Efficiency
65. Transitioning Leadership Annual Donors to Major Donors
66. Uncovering More Planned Giving Prospects
67. Why Fundraisers Need to Be Excellent Beat Reporters
68. Working with a Donor's Financial Planner
69. Writing Workshop for Advancement Professionals: Sessions 1 & 2

## Marketing and Communications

1. 9 Principles for Branding Your Capital Campaign
2. 15 Tips to Engage Gen Z in Your Communications
3. A New Approach: Distributed Content Strategy in Higher Ed Marketing
4. A Showcase of Innovative Storytelling Mechanisms Across Higher Ed
5. Annual Giving: Integrating Email with Your Overall Strategy
6. Assessing Your Current Presidential Voice
7. Athletics Fundraising: Direct Mail Strategy
8. Branding and Marketing Your Leadership Annual Giving Program
9. Branding Your Career Services Department
10. Building the Infrastructure for a Culture of Philanthropy in the Digital World
11. Campaign Communications: Clearly Communicating Objectives and Impact
12. Communicate with Young Alumni Across Multiple Channels
13. Connecting Central Marketing and Advancement Teams: An Innovative Approach
14. Create Inspiring Campaign Communications
15. Creating a Framework for Proactive Issues Management
16. Customizing Donor Communication through Smarter Segmentation
17. Developing Personas in Higher Ed Marketing
18. Developing Presidential Voice: Toolkit for Marketing and Communications
19. Effectively Implementing Your Social Media Policy
20. Ensuring Successful Outcomes with Marketing Consultants

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21. Executing Your Communications Plan During a Crisis
22. Facebook for Donor and Alumni Engagement
23. Five Steps for Sub-Branding in Higher Education
24. Frequently Asked Questions for Alumni Magazine Professionals
25. Higher Ed Marketing: Building the Infrastructure for Content Creation and Curation
26. How to Write an Effective Op-Ed in Higher Education
27. Implementing Your Social Media and Branding Guidelines
28. Improving Social Media Content Curation with Student Ambassadors and Hashtag Campaigns
29. Inspiring Campaign Branding and Communications: Creating a Unique Campaign Brand
30. Instagram for Donor and Alumni Engagement
31. Integrating Social Media with Traditional Solicitation Channels
32. Launching a Branding Initiative
33. Leading with Social First: A Innovative Approach to Content Creation
34. LinkedIn for Donor and Alumni Engagement
35. Making Your Social Media Content Accessible and Inclusive
36. Managing Higher Education Social Media Challenges
37. Marketing Estate Planning Tools to Uncover Planned Giving Prospects
38. Marketing Your Planned Giving Program
39. Measuring and Tracking the Effectiveness of Your Marketing and Branding Efforts
40. Optimizing Your Online Giving Site
41. Partnering Advancement and Communications to Enhance Your Institution's Brand
42. The Promise and Peril of Podcasting in Higher Education
43. Prospecting Using Social Media
44. SEO Primer for Higher Ed Marketing
45. Snapchat for Donor and Alumni Engagement
46. Social Media in Student Recruitment: Emerging Channels and Metrics
47. Speechwriting for Campus Leaders: Tips for New or Occasional Speechwriters
48. Staffing and Structuring a Successful Marketing Communications Department
49. Strategizing for Social Media in Advancement
50. Strengthen Your Instagram Strategy in Higher Education
51. Tactics to Increase the Visibility of Your Honors Program or College
52. Tools for Creating a Brand Culture at Your Institution
53. Twitter for Donor and Alumni Engagement
54. University Magazines: Maximizing Print and Digital Content
55. Using Market Research to Inform Strategy
56. Using Personas in Higher Ed Marketing
57. Using Social & Digital Data to Inform Marketing Intelligence
58. Using Social Media in Your COVID-19 Response
59. Using Social Media Creatively to Increase Donor and Alumni Engagement
60. Using Student Storytelling in Higher Ed Marketing
61. Writing Resource Manual



## 62. Youtube for Donor and Alumni Engagement

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