

Campaigns Boot Camp™ 2013



© INDEPENDENT SCHOOL ADVANCEMENT

An intensive 3-day workshop for Independent School Heads, Board Chairs & Chief Advancement Officers

June 16 - 19

Davis & Elkins College



While independent schools sought ever-more ambitious capital campaign numbers over the past decade, their advancement shops met their charge by

turning to an ever-shrinking pool of high net-worth parents and alumni. Now is the time to stop that unsustainable strategy and position your current or upcoming campaign to successfully respond to the new realities of campaign fundraising.

With a focus on broadening your base of support, involving more of your key constituencies, and a more comprehensive approach to campaigns, we invite you to join us at Davis & Elkins College to learn how to succeed in your institution's next or current capital campaign. This event will help you:

- Obtain genuine board support and participation
- Balance annual, capital, endowment, and planned giving programs
- Integrate all volunteers, including young alumni and current students

- Effectively utilize technology and social media for maximum impact
- Plan and prepare for a successful campaign

Is your school considering going into a major campaign for capital needs, endowment, or all of the above? Join us for this inspiring and intensive 3-day Campaign Boot Camp™ and kick-start your plans for success.

Send a Team for Greater Impact

Because successful campaigns require both an intense institutional commitment and buy-in from your Board, Administrative Team, and Advancement



Staff, we strongly encourage Heads of School to attend with their Board Chair and Chief Advancement Officer / Director of Advancement as well as Campaign Chairs

or other key stakeholders who will be involved in the planning and execution of your next campaign.

Note: Board Chairs attend free* with the paid registration of the Head of School (see registration information for full details).

CAMPAIGN BOOT CAMP AGENDA - DAY 1

Welcome – Emerging Trends in Independent School Campaigns

8:30 – 9:00 a.m.

The nature and execution of campaigns in independent schools has changed dramatically post-recession. In this opening session, we will the emerging trends and best practices that every school needs to consider, and the impact on campaign fundraising.

Campaign Readiness & Planning

9:00 – 10:15 a.m.

When you fail to plan, plan to fail! Famous words once spoken still ring true today. Nothing is more important than the plans you put in place, and ensuring you have a solid foundation of internal and external readiness *before* you embark on your next campaign. Learn what the key elements are to campaign planning and readiness that will ensure success in your next campaign.

The Role of the Board, the Head, and the Chief Development Officer

10:30 – 12:00 p.m.

Fundraising is full of rules of thumb and many revolve around board management. What is a reasonable role for the board to play in a campaign? What does it take for a board to stop saying "the" campaign and start saying "our" campaign? How can you effectively encourage board members to introduce those in their spheres of influence to your institution? This session will help you examine these questions and ensure committed board involvement.

Lunch

12:00 – 1:00 p.m.

The Case for Support – The Power of Vision & Story Telling

1:00 p.m. – 2:15 p.m.

A decade ago schools focused on *mission-driven* messages in crafting the case for support in a major campaign. Today we understand that *strategic visioning* is the key to crafting a case for support that is as *inspirational* as it is *aspirational*. Participants will learn the practical – and tactical – elements of strategic visioning, how to implement this process in your own institution, and how the power of storytelling can have a catalytic influence on your campaign efforts.

Data-Driven Strategy Development

2:15 – 3:00 p.m.

While a handful of lead donors may put your campaign on the map early, it will be the legions of devoted “mid-level” donors who ensure your campaign’s ultimate success. Your donor base needs to be broader than ever, but that need often doesn’t match with the reality of your current database. This session will give you fresh ideas for expanding your reach and achieve your goals.

Effective Strategies for Recruiting and Managing Volunteers

3:15 – 4:15 p.m.

Often, the best person to solicit a gift is not a staff member. But who should be recruited as fundraising volunteers and what should be expected of them? Further, what are the right roles and responsibilities for young alumni – your future major donors – to play in the process? In this session, you will learn tips for identifying, training, expectation-setting, managing, and ensuring a rewarding experience for campaign volunteers at every level.

The Comprehensive Campaign – Engaging Everyone in your Campaign

4:15 – 5:30 p.m.

Once an institution makes the decision to launch a campaign, who should be asked to participate, when should they be asked, and how do campaigns affect the need to continue unrestricted annual or planned giving programs? How do prioritize and position your campaign initiatives? This session will provide a solicitation road map for planning the thoughtful integration of your annual and planned functions while keeping in mind the balance between short- and long-term institutional funding.

Cocktail Reception & Dinner with Special Guest, Keynote Speaker G.T. “Buck” Smith

6:00p.m.



G.T. “Buck” Smith is one of the most inspirational and remarkable fundraisers in education. The creator of *Moves Management*™—now considered the standard in virtually every independent school, college and university in the country—Buck’s passion, knowledge, and expertise when it comes to educational fundraising is unsurpassed. “The underlying thing for me is relationships. Hardly anything important happens that doesn’t have to do with relationships,” says Buck. “Life is built on genuine relationships, where trust and integrity are without question. When that is there, there are no limits.”

Currently serving as President at Davis & Elkins College, we are very pleased that Buck has agreed to join us. Those who will attend this conference will never forget hearing from one of the greatest professionals ever to have served the field of institutional advancement. When a Hall of Fame for Fundraisers is created, G.T. Smith will be the first to enter.

CAMPAIGN BOOT CAMP AGENDA - DAY 2

Integrating Social Media & Online Strategies Into Your Effort

8:30 – 9:45 a.m.

The bulk of any campaign's work will always be done face to face in the field. That said, the impact and reach of social media opportunities and the effective integration of online strategies should not be overlooked. This session will give you a look at effective campaign social media deployment, including ideas for measuring results. Special attention will be paid to options you can call upon first, then grow later.

Break

9:45 – 10:00 a.m.

Begin With the End in Mind

10:00 – 11:00 a.m.

Stewardship for your most major donors is easy, but how do you show your appreciation and commitment to your mid-level donors or those individuals who give their time and talents? This session will help you build a stewardship focus into your campaign plans and formulate meaningful ways to keep your constituencies of all varieties feeling informed and appreciated.

Case Study

11:00 – 12:30 p.m.

During this session, you will examine an actual campaign from beginning to end. You'll evaluate plans, strategies, and tactics to determine what you might do differently and how what you learn can be adapted to your situation.

Lunch

12:30 – 1:30 p.m.

Developing Your Working Plan Moving Forward / Final Q&A

1:30 – 3:00 p.m.

With uncertainties clarified, now it's time to put it all together. This session will help you prioritize your efforts and outline your work moving forward. Following a brief discussion of the goals to such a plan, you will begin to design a longer-term plan for maximizing your future efforts.

Conference Wrap-Up and Adjourn

3:00 p.m.

Faculty Bios

Ingrid Healy, CFRE - Principal, Independent School Advancement



With more than 20 years experience in independent school advancement with an emphasis on major gift fundraising, Ingrid has worked with boarding and day schools, single-gender and co-ed schools, elementary and k-12 schools throughout the United States and Canada. She has led award-winning programs in annual giving, communications, anniversary celebrations and campaigns. Her experience in leading and managing capital and endowment campaigns ranges in scope from from \$4 million to \$100 million.

A frequent presenter for the Council for the Advancement and Support of Education (CASE) and the National Association of Independent Schools (NAIS) Ingrid was recognized with a CASE Crystal Apple Award for teaching excellence in 2006. She has served on the CASE Commission on Philanthropy, on faculty at the CASE Summer Institute for Independent School Advancement for 8 years. She is a contributing author to the NAIS book *Philanthropy in Independent Schools* (3rd Edition).

John Carr - Director of Major Gifts, Oglethorpe College



John Carr brings almost 30 years educational fundraising experience, including 25 years working for and consulting with independent schools. John currently leads the major gifts effort for Oglethorpe University in Atlanta, Georgia, where they recently completed a \$47 million campaign—the largest in the school's history. Prior to joining Oglethorpe John served as the Chief Advancement Officer in a number of independent schools in which he planned and led multiple, successful campaigns including micro-campaigns of \$1 - 2.5 million, to comprehensive campaigns of \$50 million+.

John is an active member of the Council for the Advancement and Support of Education. He has served on the CASE/NAIS conference planning committee, the CASE District III Board, and has presented at more than a dozen CASE conferences.

Keynote Speaker: G.T. “Buck” Smith

The founder of Moves Management™ and president of Davis & Elkins College, Buck Smith will join us to share his expertise, knowledge, and wisdom. Buck's insights and passion for this important work we do will

leave you inspired and excited to get started!

EARLY BIRD PRICING

Register for Campaigns Boot Camp™ 2013 by April 30, 2013 and save \$100!

Registration fees include: full access to all conference materials, access to the networking reception on Monday, and all meals and snacks throughout the conference.

***Board Chairs attend FREE with paid registration of the Head of School.** (Does not include accommodations)

For complete registration information and to register online, visit www.independentschooladvancement.com.



Campaign Boot Camp™ is being held at Davis & Elkins College, in the historic Graceland Inn & Conference Center.

Graceland is ideally situated at the gateway to the Monongahela National Forest, a quick trip to Spruce Knob (the highest point in the state) and a short drive from three championship golf courses!

Area activities range from world class mountain biking and whitewater, to leisurely nature walks and angling miles of pristine trout streams.

**HOTEL RESERVATIONS:**

A room block has been reserved at the Inn & Conference Center for June 16, 17 and 18. To reserve your room, please call 800.624.3157 and indicate you are with the Independent School Advancement Conference. Rates vary.

A room block has also been reserved at the Holiday Inn Express Hotel & Suites. Please call 304.630.2266 and indicate that you are with the conference to receive the room rate of \$65 for single or double occupancy, plus tax.

Independent School Advancement
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