



DRAFT PROGRAM AGENDA

DAY 1: MONDAY, JUNE 29, 2020 (11:00 a.m. - 1:30 p.m.) BREAK-OUT SESSION, INTRODUCTIONS, OPENING REMARKS AND KEYNOTE PRESENTATION

11:00 a.m. – 12:00 p.m. Break-out Session

This initial break-out session is designed to ascertain the present levels effectiveness and productivity of the participants' advancement function as gauged by national assessment tools and benchmarks. The essence of the discussions focuses on the components that are critical and fundamental to the success of a comprehensive advancement program. The outcome is a set of data-driven recommendations relative to building successful strategies in the pursuit of private sector resources.

12:00 p.m. – 1:30 p.m. Luncheon – Introductions, Opening Remarks and Keynote Presentation

The Keynote Presentation: State of the Profession/Reflections: The 21st Century Fundraising Landscape – Opportunities and Challenges for the Community College.

DAY 1: MONDAY, JUNE 29, 2020 (1:45 p.m. - 5:00 p.m.) CURRICULA – INTERACTIVE SESSIONS AND PRESENTATIONS

1:45 p.m. – 3:15 p.m. Session 1: “Visionary Leadership and Setting the Tone – An Overview of Philanthropy and Today’s Community College/Trends in Community College Education and Fundraising”

Opening remarks and discussion about the role and importance of “advancement” in two-year colleges. Participants will learn about the changing external (macro) and internal (micro) environments impacting philanthropy. Specific trends and conditions will be described that influence the fundraising capability and capacity within the community college marketplace.

3:30 a.m. – 5:00 a.m. Session 2: “Positioning the College for Philanthropic Success – Determining Internal Fundraising Readiness through the Conduct of a Development Assessment”

Participants will be introduced to techniques to assess the overall effectiveness of a college’s fundraising program and build infrastructures, benchmarks and corresponding plans of action. Specific example assessment techniques and applications will be provided. Participants will also engage in an interactive session to assess and explore individual internal fundraising programs and to increase organizational capacity to maximize opportunities.

5:30 p.m. – 7:00 p.m. President’s Reception

All JSFI participants are invited to a reception at the home of Claremont Graduate University’s president, Dr. Len Jessup.

DAY 2: TUESDAY, JUNE 30, 2020 (8:30 a.m. – 5:00 p.m.) CURRICULA – INTERACTIVE SESSIONS, PRESENTATIONS AND BREAK-OUT GROUPS

8:30 a.m. – 10:00 a.m. Session 3: “Assessing the External Environment – The Conduct of a Feasibility Study”

A feasibility study is designed to ascertain information related to program execution, availability of financial support and identification of volunteer leadership. It also provides the data necessary to prepare a “plan of campaign” that will organize the volunteers to optimize and maximize program execution and success. Another critical component of the study is the feedback that a college will receive on its vision and plan for growth and responsiveness. By incorporating feedback into the institution’s plan of action, the College and its Foundation will be able to refine and articulate a vision for the institution that will be publicly recognized as compelling and legitimate.

10:15 a.m. – 11:45 a.m. Session 4: “Prospect Research and Evaluation – The Importance of Identification, Research and Evaluation”

The prospect research function identifies individuals, corporations and foundations that have a philosophical rationale for becoming involved in the life of the college and the potential to make large gifts, investments and/or create partnerships. It also determines the most effective way to cultivate and solicit major gifts from these sources.

This session will introduce the role of donor research, including identifying and segmenting prospects according to appropriate variables. Evaluative criteria will include analysis of individuals’ financial capacity, relationship with the college and alignment (affinity) with the colleges’ strategic directions.

12:00 p.m. – 1:15 p.m. Session 5 (Working Luncheon): “The Market-oriented Case for Support – Discerning and Articulating the President’s Vision”

A college must be able to express clearly the benefits it provides and to whom. The “case for support” defines the college's mission, goals, and natural constituencies (those it serves) and the distinct benefits it provides to these groups. In this regard, an effective “case for support” is also a marketing statement. The college's benefits are communicated in a manner that prompts a positive response on the part of prospective donors and/or grantor agencies. This session covers the elements necessary for developing effective case statements for giving. The similarities and

differences in content and intent will be discussed— providing participants with a working knowledge of methods for improving their skill in building a “market-oriented case for support.”

1:30 p.m. – 2:45 p.m. Session 6: “Tell Your Story – Building Long-term Friends Through Cultivation”

Cultivation and awareness strategies are essential in a college’s “move management” process. They are used to communicate an organization’s mission, goals, and aspirations resulting in raised awareness and a broadened base of financial support. Interest is brought about through personal relationships and the act of participation. However, community colleges are frequently referred to as the “best kept secret.” Therefore, it is paramount that colleges consistently and routinely employ a process that is designed to gauge the communities’ perceptions, promote levels of awareness and discern areas of intervention and financial support. Three specific strategies are detailed that deliver individual, targeted and broad-based levels of relationship-building; thus, resulting in increased volunteer engagement and donor gift acquisition.

3:00 p.m. – 4:30 p.m. Session 7: “Securing the Gift – Effective Solicitation Techniques: Maximizing the Investment Opportunity”

Fundraising, in all of its forms, is crucial for colleges to realize their visions, complete their projects and fulfill their obligations to the communities that they serve. This session will focus on “best practices” and “case studies.” Specifically, a closer look will be provided on strategies to, not only acquire gifts, but to maximize the investment and partnership potentials. Special emphasis will be placed on implementing proven tips and techniques that result in greater levels of success. Prescribed solicitation processes are offered including the roles and responsibilities of the college president, chief development officer and volunteer. This session will offer interactive engagements and discussions.

4:30 p.m. – 5:00 p.m. Session 8: Debriefing and Break-out Session

This “break-out session” is designed to specifically focus on the discussions of the previous presentations and include dissemination of exemplary examples, exhibits and support materials that can be used at the participants’ college settings.

DAY 3: WEDNESDAY, JULY 1, 2020 (8:30 a.m. – 4:00 p.m.) CURRICULA – INTERACTIVE SESSIONS, PRESENTATIONS AND AWARDING OF “CERTIFICATE OF COMPLETION”

8:30 a.m. – 10:00 a.m. Session 9: “The CEO and the CDO Relationship – Creating the Dynamic Fundraising Team”

Since an effective fundraising program relies heavily on the participation of enthusiastic volunteers of influence and affluence, it follows that a management component must also exist to stimulate, coordinate, and sustain volunteer activities. The chief development officer handles the

management of the volunteer resources and the fundraising program. The success of the fundraising program is tied to the effectiveness of this management. Further, the role of community college president in fundraising is moving to the center of conversations as institutions prepare for enhanced private sector intervention and assume a leading role as a catalyst for change. Participants will review and discuss the “Ideal Model” for a comprehensive development office, roles and responsibilities as well as relationships.

10:15 a.m. – 11:45 a.m. Session 10: “Building a Performance-based Foundation Board – Empowering the Volunteer”

A college’s ability to raise money is directly related to the quality of leadership recruited and trained for this purpose and the extent to which this leadership has assisted the college in shaping and defining how it can become stronger and of greater value to those it serves. Geographic reach, industry sector and wide community involvement as well as diversity of representation are essential.

This session will explore ways to create a dynamic and energized Foundation Board, including alternative board structures, analysis of the important role a board can play, and tools that help to build the skills and efficiencies of a Foundation Board to more effectively become engaged with its communities’ stakeholders, prospect bases and constituencies.

12:00 p.m. – 1:15 p.m. Session 11 (Working Luncheon): “The Comprehensive Development Plan – Creating a Pathway for Action”

The resource development strategic plan is a blueprint to achieve specific fundraising goals that support the college’s vision of its future. The “plan of action” presents a strategic direction that identifies realistic and appropriate areas of intervention that result in fundraising success. It also establishes the most productive approach to build consensus, engage volunteers, solicit prospects and create an ongoing comprehensive fundraising program.

Participants will learn how to develop a comprehensive advancement plan. Areas of concentration will focus on the major elements associated with the “giving cycle.” Participants will initiate development of a “plan of action” that will detail specific and usable strategies to advance their respective resource development programs...concentrating on the integration of fundraising principles, practices, techniques and processes.

1:30 p.m. – 3:00 p.m. Session 12: “Building Corporate and Business Partnerships — It is all About Your Niche: Workforce Development”

Cultivating corporate relationships is a critical aspect of preparing for and executing the ask. By providing an agile and responsive way to address some of the most pressing workforce needs of your corporate base, you may organically strengthen relationships that can boost donations to benefit students, employees, your institution, and the local business community.

Participants will be encouraged to generate ideas for unique corporate solutions through a better understanding of the local business community and in partnership with your workforce development division. Participants will also be engaged in an interactive and innovative “think tank” to identify products and services their organizations may provide to the business community for mutually beneficial outcomes in support of student, alumni, and local employer needs. The goal will be to develop one or two value-add services to support your fundraising strategy and create warm leads for the ask.

3:15 p.m. – 4:00 p.m. Session 13: Debriefing, Awarding of “Certificate of Completion” and Adjournment

Participants will be provided an opportunity to receive a “Certificate of Completion” from the Jack Scott Fundraising Institute.