

New Frontiers in Pipeline Development: Maximizing Mid-Level and Major Gifts
November 14, 2017
10am – 3:30pm
Dallas, TX (UT Southwestern)

Whether you are planning for a special fundraising campaign or working towards reaching new fundraising goals, this workshop provides the strategies to expand your major gift pool and build a strong fundraising foundation for the future. We all have limited resources. Come and discover new approaches that can make your fundraising program bigger and better. A growing donor base with more giving capacity will provide sustainable philanthropic support for your institutional priorities.

EAB is back with the Academy and will divide the day into two key areas:

1. Optimizing the Campaign Pipeline (2.0 hours)

Mid-level donors provide a bedrock of revenue for advancement divisions and fill the pipeline for future major gifts. Yet most college and university advancement offices do little to cultivate or steward them. Advancement leaders who overlook mid-level donors risk losing their next generation of core supporters.

This session will examine “upgrade” strategies that move mid-level donors into higher tiers of giving and discovery initiatives that engage diverse staff and students in surfacing prospect referrals. It will also look at the question of how to sustain and effectively steward a large number of mid-level donors through enhanced access to senior leaders and digital impact communications.

Participants will learn to:

- Drive consistent upgrades from donors who give mid-level gifts
- Expand the ranks of leadership societies
- Surface untapped capacity for future major gifts
- Communicate gift impact back to donors through digital channels
- Launch new initiatives around mid-level donors’ desire for insider access to senior leaders

2. Maximizing Major Gifts from Overlooked Supporters (2.5 hours)

Growing wealth and the “Era of Big Data” have created extensive opportunities for college and university advancement offices to expand the major gift pipeline. Yet advancement leaders have struggled to capitalize on the seemingly endless potential in front of them. Frontline fundraisers persist in cultivating the “usual suspects,” despite an overabundance of promising untapped leads.

To ensure success and growth for years to come, advancement leaders must actively contact, cultivate, and close gifts from previously overlooked prospects.

Participants will learn best-practice strategies to:

- Accelerate Discovery
- Optimize the Visit Hit Rate
- Increase Portfolio Churn
- Enhance Fundraiser Efficiency
- Scale Personalized Cultivation

Who Should Attend? UT institution advancement staff in the roles of: Major Gift Officers, Database Managers, Analysts and Prospect Researchers, Strategists and Campaign Planners.

Workshop Facilitator: Education Advisory Board (EAB)
Jeff Martin, Senior Consultant, Strategic Research

10/17