PPGC/2019

RESULTS-FOCUSED & DATA DRIVEN

THE FUTURE *of* MAJOR *and* PLANNED GIFTS *is* HERE

Take the Next Step In

MAJOR AND PLANNED GIFTS

Identify, Reach, and Motivate your best donors to give. Explore the latest developments in charitable planning that will help drive your Major and Planned Gifts programs to new frontiers.

KEYNOTE SPEAKERS

Amy Eisenstein

Fundraising Consultant

Happiness, Habits and Major Gift Fundraising: Strategies to Help You Survive and Thrive

Do you ever feel insecure about raising major and planned gifts? Do you have trouble keeping in touch with donors, maintaining a reliable schedule of solicitations or making the time for cultivation? Do you want to build your confidence and feel inspired? If so, you will not want to miss Amy Eisenstein, ACFRE, as she shares stories and insight on working with major and planned giving donors, building relationships and staying motivated as you work toward changing the world through philanthropy.

Pete Sommerfeld

Philanthropic Advisor
Oregon Health & Science University Foundation

It's Taken a While, But I Think I'm Beginning to Get It

Just as the most meaningful donor relationships take time to develop, our understanding of and appreciation for this work we do takes time to develop (particularly for those of us who are slow learners). In this session I hope to share some reflections on my time in this work and the understanding and appreciation that has crystalized over the years.

TRACKS

- Get Better Results
- Master Donor Conversations
- Explore New Frontiers
- Keep Your Best Donors
- Energize Your Program
- Expand Your Knowledge

Measuring for Success in Major and Planned Gift Fundraising

Amy Eisenstein

Room: Placeholder

Mon. 9:00 or 10:45

Measuring, reporting and analyzing your major and planned gift program is critical for success. Join Amy Eisenstein, ACFRE, to learn how to measure more than simply dollars raised. While dollars raised is one important factor, it's certainly not the only one to consider. Do you know your major gift donor retention rate? What about your ask to thank ratio? Do you know how satisfied your donors are with your programs? Do donors trust your leaders? Join us to learn what and how to measure, as well as set how to set appropriate long and short term goals for your major and planned gift program.

Find and Motivate Your Top Donors

Charles Schultz

Alex Oftelie

Room: Placeholder Mon. 1:30 or 3:15

Learn how to identify your top donor prospects through predictive analytics. Rank your best prospects based on donor demographics, giving records, web and email activity. Then create a custom marketing strategy for reaching your top 30 to 50 donors through personal visits, next 200 donors with print and email and the final group through integrated marketing strategies.

How to Create Donor Surveys That Improve Your Fundraising

Rachel Clemens

Room: Placeholder

Tue. 8:30 or 10:15

If you don't regularly survey your target audiences, your fundraising efforts are merely educated guesses. When done well, surveys can empower you with real, actionable, and surprising insights into what your current and prospective donors do, think, and need. Smart surveys can turn your fundraising strategy into a fine-tuned, sophisticated engine of revenue. This session will focus on all of the components of a great donor survey—including how to build it, deploy it, and analyze the results.

What Does it Mean to be (Big, Medium, or Little) Data Driven?

Brian Nelson

Room: Placeholder Tue. 1:00 or 2:45

'Big Data' and 'data-driven' permeate job descriptions, work plans, and conference sessions, but why is that? What is 'big' data and why does it matter if fundraising is a relationship business? Does it have a place in a fundraisers tool box? Or does it belong in the back office? This session will de-mystify the term and make a case for why data can help us all lead more authentic lives. Along the way, learn a process of weeding through the hype to find what matters.

Questions to Start the Donor Conversation

Jon Rich

Room: Placeholder

Mon. 9:00 or 10:45

Nice work - you secured a meeting with the prospect! So what now? How do you get to the heart of the matter? This session will explore proven ways to bring the meeting around to the topic of the donor: why they give, why they support your organization, and how they see your organization helping to shape their legacy. We will share tried-and-true talking points that develop meaningful conservations around the donor's philanthropic motivations and lead to future opportunities. You should attend this session for ideas on helping steer donor conversations, legacy creation, and blended giving opportunities. You should leave this session feeling better prepared to help your donors live a bigger impact and leave a bigger legacy at your organization.

Pledge 1%: Reaching Budding Philanthropists

Rebecca Dupras

Room: Placeholder

Mon. 1:30 or 3:15

The concept of pledging today out of tomorrow's earnings finds symmetry with planned and testamentary giving – both involve taking action today to secure future benefits for philanthropy. This presentation will look at pledging a percentage of an estate or income to charity as an effective way that donors can identify with a cause and make a meaningful commitment to the legacy they leave behind or begin on their philanthropic journey as a budding philanthropist. Rebecca will also look at legal details and requirements of pledges, what makes them enforceable or not and the charitable trust considerations involved when a charity decides to enforce a pledge or not.

You Want Me to Ask for What?! – 5 Bold Strategies to Improve Donor Conversations, Legacy & Impact

Lani Starkey

Room: Placeholder

Tues. 8:30 or 10:15

It goes without saying that the planned giving sector is highly productive and impactful with billions of dollars raised for amazing and noble causes. What is harder to determine however is how much planned giving money was "left on the table" or lost due to fundraising inefficiencies, existing business practices, or missing infrastructure support? This session will explore the most frequent and likely culprits of "gift leakage" in planned giving and offer solutions to plug those holes. This breakout will focus on disrupting certain "best practices" in the areas of donor conversations, legacy creation, and gift agreements, to name a few. You should attend this session if you want to look critically at how you and your organization can improve your donors' giving experience, legacy, and philanthropic impact.

Mastering Donor Conversations: Overcoming the Top 10 Objections to a Gift Plan

Phil Purcell

Room: Placeholder

Tues. 1:00 or 2:45

This session will explain how to master donor conversations when objections to a gift plan are made by a donor. Specific objections that we will explore include the need to save for retirement, care for loved ones, not enough income, erosion of income by taxes, life is too busy, planning is too complicated and more! The session will highlight the use of blended gift plans to address these objections.

Trends in Philanthropy

Crystal Thompkins

Avery Fontaine

Room: Placeholder **Mon. 9:00 or 10:45**

Philanthropy today is constantly evolving with both donors and non-profits challenging the status quo. This session will provide an overview of current philanthropic trends including how donors are choosing to make an impact with their giving; what charitable organizations are doing to address changing demographics and giving models; and opportunities for meaningful engagement at all levels of giving.

Successful Marketing Program Strategies

Kristen Schultz Jaarda

Karla Aho

Pam Paterson

Tammy Wernke

Room: Placeholder **Mon. 1:30 or 3:15**

Is your planned giving program vibrant and growing? Are you looking for new ways to secure bequest acknowledgements? Are you looking to grow your gift annuity program or increase the number of charitable remainder trusts with your organization as the remainder beneficiary? Have you thought about strategies to increase your total annual revenue through planned gifts? Come hear success secrets from a panel of expert planner gifts marketers. Be inspired by their ideas as you learn how to take your program to the next level.

I'm Peddling as Fast as I Can! How to Multiply Your Influence Without Expanding Your Staff

Pete Sommerfeld

Room: Placeholder

Tues. 8:30 or 10:15

You love your job, you love what you are privileged to do, but there never seems to be enough time to get it all done! Add to that the fact that in the press for increased philanthropic support you are asked to do even more. As if that weren't enough, in many cases, budgetary constraints do not allow for increased expenditures to hire additional staff to meet those increasing goals. So, what do you do? How do you increase productivity without adding staff? This session will offer suggestions for answering those questions, utilizing both prepared remarks and shared experiences, with a goal of equipping attendees to help make changes that will increase their productivity. (But, rest assured, this is not another Time Management seminar.)

Philanthropic Mortgages and the Blended Gifts of Personalized Philanthropy – Keys to Putting the Donor First

Steven Meyers

Room: Placeholder

Tues. 1:00 or 2:45

Your home mortgage is personalized. Your gift planning is not! In this session, we'll examine the popular phenomenon of "blended gifts" from a radically different perspective – putting the donor first. Learn to apply the elegant and transforming concept of the Philanthropic Mortgage: the purposeful and intentional staging of current and future gifts over a donor's lifetime. Mastering virtual endowments, philanthropic mortgages and step-up gifts may well restore your creativity and transform your practice. This session will help bring larger gifts to you and greater impact to your donors, sooner.

Set Up For Success: Leveraging Campaigns to Build Meaningful Donor Recognition Programs

Laura Gobbi

Room: Placeholder

Mon. 9:00 or 10:45

This session will explore how the Smithsonian leveraged the largest campaign ever launched by a cultural organization --$1.88B -- to build meaningful, high-impact donor recognition programs that served short-term stewardship needs for top donors while establishing a path for a post-campaign future. We will discuss how partnerships with internal and external stakeholders, as well as leveraging institutional and volunteer leadership were critical to the program's success.

Secrets of the 2nd Gift – the Key to Donor Retention

Jay Love

Room: Placeholder

Mon. 1:30 or 3:15

Fundraisers spend a lot of time acquiring new donors, and with good cause. However, in order to create a long-lasting relationship, the most critical gift isn't the first; it's the second. In this session, nonprofit technology veteran Jay Love will make the case for why donors should concentrate on acquiring a donor's second gift in order to achieve sustainable funding, high donor retention rates and high donor lifetime values. You'll see examples that can be implemented by any organization, whether you are a one-person shop or a large development department. The results can be astounding when put into daily use!

How We Used Campaign Momentum to Transform Our Legacy Society

Glenn Vivian

Sharon Wheeler

Room: Placeholder Tues. 8:30 or 10:15

In 2012, Boston University launched the first fundraising campaign in its 175-year history with an initial goal to raise $1 billion to further BU's standing as one of the largest and best private research universities in the world. How did our small Planned Giving program use this momentum to more than triple our legacy society membership and develop a collaborative model with fundraiser colleagues to celebrate our donors and strengthen our prospect pipeline? In this session we'll share stories of what we learned and what might work for you.

Optimizing Social Media and YouTube Marketing Strategies

Andy Ragone

Kate Bailey

Room: Placeholder Tues. 1:00 or 2:45

How do social media and YouTube help with planned giving? Using helpful marketing platforms such as FaceBook, Twitter, Instagram and YouTube can place prospective donors on your radar. Learn how to use social media and YouTube to build ongoing relationships with your planned giving donors. This session features actual examples from nonprofit social media pages and best practices. Learn current strategies to grow your social community and increase responses on your social media and YouTube platforms.

Simply Irresistible: Demonstrating the Value of Gift Planning to Decision Makers

Melanie Norton

Room: Placeholder

Mon. 9:00 or 10:45

This presentation explores different ways to articulate the relevance of gift planning to those who may be less familiar with the intrinsic benefits of a robust program and effort. Attendees will glean creative tools to better understand the stressors decision-makers face when resourcing an operation and help gift planners "speak the language" when relating to supervisors, boards and others who impact program support. This program investigates options for measuring program and gift planner success (metrics) and developing a narrative that will help build long-term investment in gift planning as an essential part of any comprehensive development program.

Creating Metrics That Measure What is Important and Increase Performance for Major and Planned Gift Officers

Roy Grisham

Room: Placeholder

Mon. 1:30 or 3:15

Great metrics should motivate and guide your development team. This presentation will look at different approaches to metrics and discuss the importance of individualizing your metrics to the person and situation. Roy will discuss solutions to the problem created by the one size fits all metric reporting. The discussion will also cover the use of metrics to encourage the building of the pipeline of future gifts. Leave with a plan to create reports that allow for the best interpretation of metrics throughout the year.

Building an Effective Planned Giving Marketing Plan to Reach Your Best Prospects

Joseph Tumolo

Patrice Cablayan

Philip Zielinski

Room: Placeholder Tues 8:30 or 10:15

How do you create an effective planned giving marketing plan? Who should be your target audience? What are the most time efficient ways to market planned gifts? Hear from a panel of experts about how they have successfully marketed planned gifts at their organizations. Discover best practices and real-world examples so you can create a time efficient and effective planned giving marketing plan.

Why Gift Annuities Are Important For Your Future

Ron Brown

Room: Placeholder

Tues. 1:00 or 2:45

Your future success is in your hands! Learn what rapidly-growing gift annuity programs are doing that other programs are not; how to benefit from American demographic trends; how to interpret breaking news about interest rates and other economic data; how to assure annuitants about the safety of their lifetime payments; and how to prove to your business office and fundraising leadership that gift annuities deserve a greater investment of staff time and marketing dollars.

Getting Something Back: Gifts That Provide Lifetime Income for Donors

Jeff Davine

Room: Placeholder
Mon. 9:00 or 10:45

Many donors think that charitable giving consists of writing a check to the donor's favorite charity. Educating donors on the many alternative ways of benefitting a donor's charity of choice is an important task for planned giving professionals. These alternatives include gifts where the donor can receive a benefit in return (in addition to a charitable contribution deduction). This presentation will focus on giving options such as charitable gift annuities, charitable remainder trusts, and residential (and farm) remainder interests and the advantages and restrictions associated with each of these life income gift vehicles.

Gifts of Valuable Assets

Angela Throne

Room: Placeholder
Mon. 1:30 or 3:15

How many times have you been on a visit and a donor brings up the idea of donating something other than cash? From stocks, to real estate, to stamp collections when should you say "Yes!" and when should you back away slowly? This session will focus on the questions that need to be asked about different assets and the different methods one might give a valuable asset.

Retirement Plans and Gifting Options

Andy Morrison

Kristin Shore

Room: Placeholder
Tues. 8:30 or 10:15

With 61% of U.S households owning tax advantaged retirement accounts, it behooves Gift Planners, Major Gift Officers and Financial Advisors to be well-versed in gifting options involving retirement plans. This session will provide a general overview of the various types of retirement plans, including contribution, distribution, and inheritance rules and options. It will also explore a variety of gifting strategies using retirement plans, both during life and upon death. Several cases illustrating retirement plan gifting strategies will be shared and discussed.

A Crash Course on Planned Giving

Charles Van Patten

Room: Placeholder
Tues. 1:00 or 2:45

Whether you are new to the world of planned giving or have years of experience, take an opportunity to brush up on the fundamentals of planned giving. This course will cover a range of planned gifts. We will touch on the basic rules for each gift type, explore example scenarios and discuss the potential benefits and pitfalls of particular planned gifts.

SEMINARS

We encourage you to attend one of our popular post-conference seminars. Our seminars will give you additional knowledge to reach donors, discuss the best gift options to achieve your goals and help your organization close more gifts.

Please visit our registration desk to enroll.

Integrated Marketing Seminar

Room: Placeholder
Wednesday, September 25, 2019
8:30 a.m. to 3:00 p.m.
$ FREE

What types of messages resonate with donors? What keywords and phrases prompt donors to act? The Integrated Marketing Seminar will provide insights into positive marketing messages and share successful examples of messaging that works. You will walk away with practical ideas for web, email, print and social media marketing to help you engage your donors and close more gifts.

Major & Blended Gifts Seminar

Room: Placeholder
Wednesday, September 25, 2019
8:30 a.m. to 3:30 p.m.
$ FREE

Your donors have more reason than ever to make major, blended and planned gifts. The Major & Blended Gifts Seminar will provide the tools to conduct successful donor visits and create custom donor proposals like those used by charities engaged in billion dollar campaigns — at a fraction of the time and cost. Learn how to approach donors for major gifts, illustrate the benefits of blended and planned gifts and produce motivating and effective presentations to close these gifts.

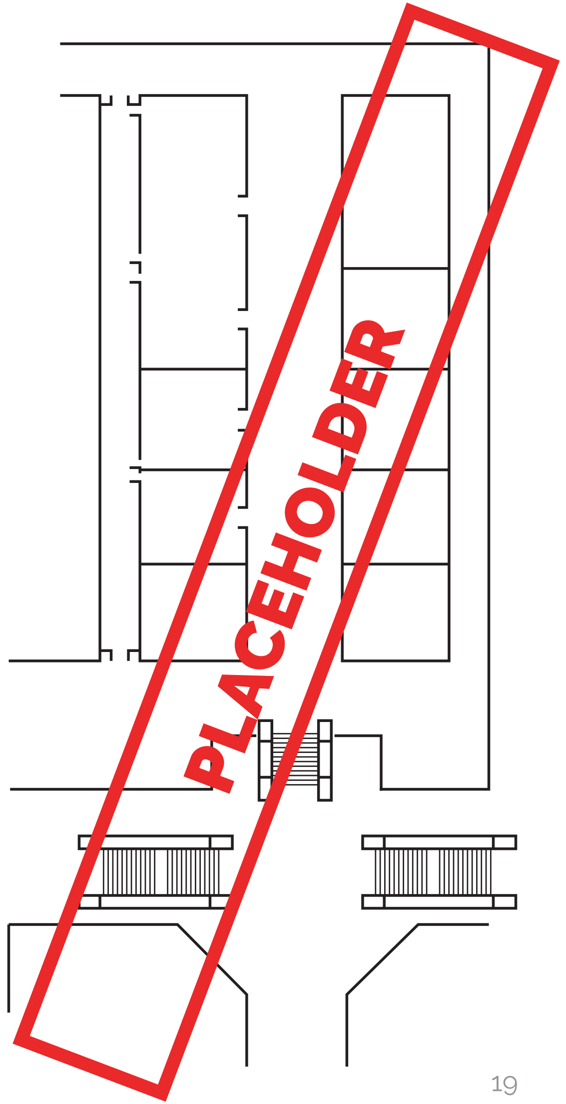
CE Credits: 5 hours. Receive five free GiftCollege credits when you register.

Advanced Seminar

Room: Placeholder
Wednesday & Thursday September 25 & 26, 2019
8:30 a.m. to 5:00 p.m.
$ 495

The Advanced Seminar explores basic to complex major and planned gifts and will give you insights into the kinds of gifts that will be attractive to donors. Discover the most effective gift concepts for your major donors including basic and advanced charitable remainder trusts, gifts from IRAs and qualified retirement plans and charitable lead trusts.

CE Credits: 12 hours. Receive five free GiftCollege credits when you register.



Monday - September 23, 2019

	Get Better Results Placeholder	Master Donor Conversations Placeholder	Explore New Frontiers Placeholder	Keep Your Best Donors Placeholder	Energize Your Program Placeholder	Expand Your Knowledge Placeholder
8:30 - 8:50	Opening Welcome - Located in Placeholder					
9:00 - 10:15	Metrics to Measure Fundraising Success Amy Eisenstein	Questions to Start the Donor Conversation Jon Rich	Trends in Philanthropy Crystal Thompkins, Avery Fontaine	Set Up For Success Laura Gobbi	Demonstrating Value to Decision Makers Melanie Norton	Donor Life Income Gift Alternatives Jeff Davine
10:15 - 10:45	Break	Break	Break	Break	Break	Break
10:45 - 12:00	Metrics to Measure Fundraising Success Amy Eisenstein	Questions to Start the Donor Conversation Jon Rich	Trends in Philanthropy Crystal Thompkins, Avery Fontaine	Set Up For Success Laura Gobbi	Demonstrating Value to Decision Makers Melanie Norton	Donor Life Income Gift Alternatives Jeff Davine
12:00 - 1:30	Lunch / Awards / Happiness, Habits and Major Gift Fundraising: Strategies to Help You Survive and Thrive Amy Eisenstein Located in Placeholder					
1:30 - 2:45	Finding Top Donors Charles Schultz, Alex Oftelie	Reaching Budding Philanthropists Rebecca Dupras	Successful Marketing Program Strategies K. Schultz Jaarda, T. Wernke, P. Paterson, K. Aho	The Key to Donor Retention Jay Love	Creating Metrics That Measure What is Important Roy Grisham	Gifts of Valuable Assets Angela Throne
2:45 - 3:15	Break	Break	Break	Break	Break	Break
3:15 - 4:30	Finding Top Donors Charles Schultz, Alex Ofteli	Reaching Budding Philanthropists Rebecca Dupras	Successful Marketing Program Strategies K. Schultz Jaarda, T. Wernke, P. Paterson, K. Aho	The Key to Donor Retention Jay Love	Creating Metrics That Measure What is Important Roy Grisham	Gifts of Valuable Assets Angela Throne
4:30 - 5:30	Reception - Located in Placeholder					

Tuesday - September 24, 2019

	Get Better Results Placeholder	Master Donor Conversations Placeholder	Explore New Frontiers Placeholder	Keep Your Best Donors Placeholder	Energize Your Program Placeholder	Expand Your Knowledge Placeholder
8:30 - 9:45	Donor Surveys for Improved Fundraising Rachel Clemens	Disrupting Traditional Legacy Conversations Lani Starkey	Multiply Your Influence Pete Sommerfeld	Legacy Society Transformation Glenn Vivian, Sharon Wheeler	Building an Effective Marketing Plan Joseph Tumolo, Patrice Cablayan, Phil Zielinski	Retirement Plans and Gifting Options Andy Morrison, Kristin Shore
9:45 - 10:15	Break	Break	Break	Break	Break	Break
10:15 - 11:30	Donor Surveys for Improved Fundraising Rachel Clemens	Disrupting Traditional Legacy Conversations Lani Starkey	Multiply Your Influence Pete Sommerfeld	Legacy Society Transformation Glenn Vivian, Sharon Wheeler	Building an Effective Marketing Plan Joseph Tumolo, Patrice Cablayan, Phil Zielinski	Retirement Plans and Gifting Options Andy Morrison, Kristin Shore
11:30 - 1:00	Lunch / It's Taken a While, But I Think I'm Beginning to Get It Pete Sommerfeld Located in Placeholder					
1:00 - 2:15	Data Driven Fundraising Brian Nielson	Overcoming the Top 10 Donor Objections Phil Purcell	Blended Gifts of Personalized Philanthropy Steven Meyers	YouTube and Facebook Strategies Andy Ragone, Kate Bailey	Gift Annuities and Your Future Ron Brown	Planned Giving Crash Course Charles Van Patten
2:15 - 2:45	Break	Break	Break	Break	Break	Break
2:45 - 4:00	Data Driven Fundraising Brian Nielson	Overcoming the Top 10 Donor Objections Phil Purcell	IBlended Gifts of Personalized Philanthropy Steven Meyers	YouTube and Facebook Strategies Andy Ragone, Kate Bailey	Gift Annuities and Your Future Ron Brown	Planned Giving Crash Course Charles Van Patten

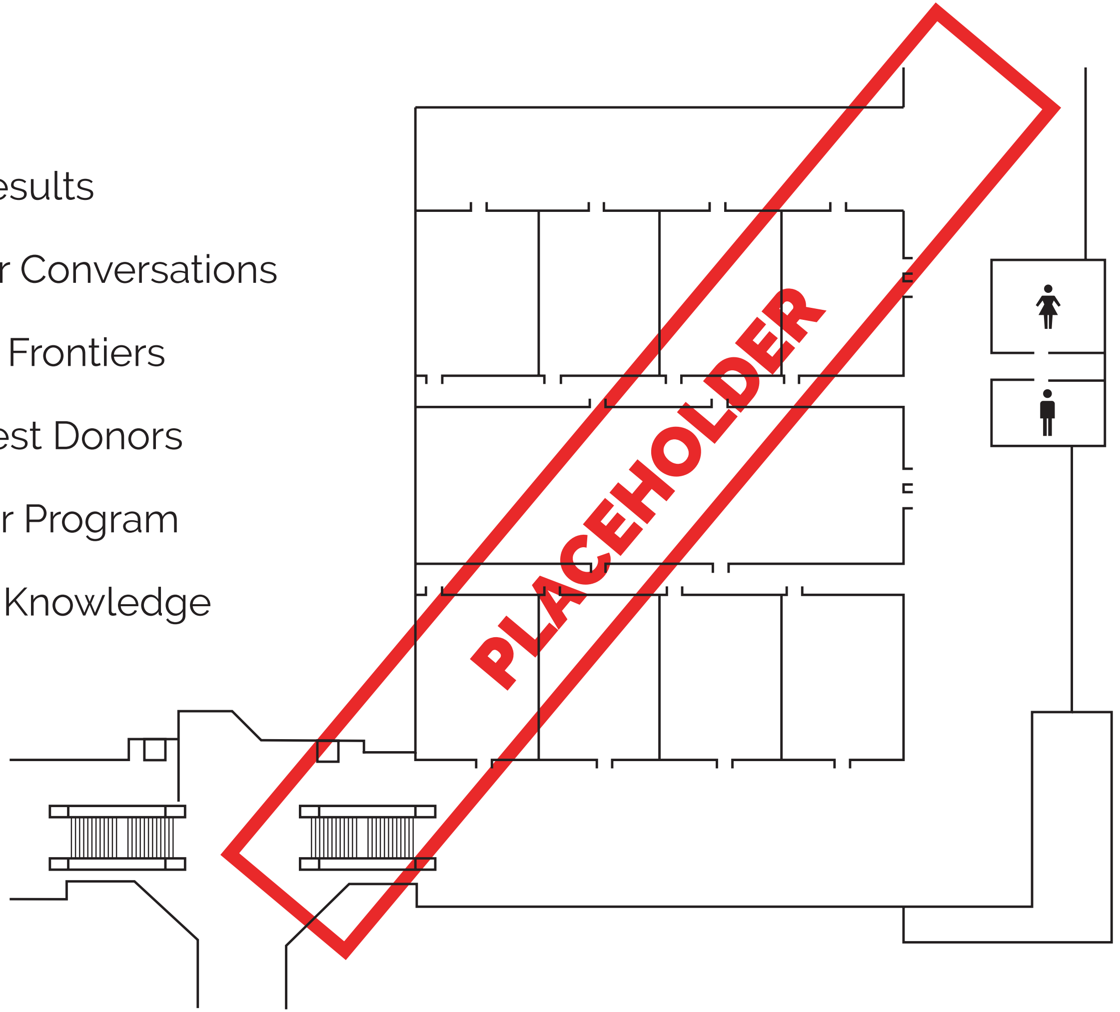
The Westin Lombard Yorktown Center

Ideally located in Lombard, this stylish hotel places you near businesses and attractions in the western suburbs as well as in Chicago. Take a complimentary shuttle to the nearby Metra station for an easy ride to downtown to explore Navy Pier, Magnificent Mile, and Wrigley Field. Closer to home, you'll find the Brookfield Zoo, Morton Arboretum, shops and so much more.

EVENT MAP

Placeholder

- ?-? Get Better Results
- ?-? Master Donor Conversations
- ?-? Explore New Frontiers
- ?-? Keep Your Best Donors
- ?-? Energize Your Program
- ?-? Expand Your Knowledge



PPGC/CHICAGO

2019 Practical Planned Giving Conference

Crescendo

Integrated Marketing for Planned Gifts

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