

MEASURING AND EVALUATING DEVELOPMENT OFFICER PERFORMANCE

June 19-20, 2012
New Orleans, LA



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OVERVIEW

If a development officer spends too much time on long-term prospects, yearly funding goals won't be met, and if too much time is placed into immediate solicitations, future, long-term success is jeopardized. Whether a DO meets a dollar goal is relatively easy to measure, but no traditional performance metrics exist to gauge relationship development, leaving many shop managers struggling to assess their officers' overall performance.

This conference will help you craft answers to that struggle. Join us in New Orleans to learn how to maximize your fundraisers' results by incentivizing their performance beyond dollars raised. You will leave the event with an initial DO metrics solution in hand and tools for:

- Selecting the right level of technology to track your plan
- Gaining buy-in for your effort
- Implementing your solution

WHO SHOULD ATTEND

Advancement executives and managers will leave the conference with an initial plan to begin to better measure the performance of their development officers.

LEARNING OUTCOME

After participating in this conference, you will be able to use an initial plan to begin to better measure the performance of your development officers.

AGENDA

TUESDAY, JUNE 19, 2012

8:00 – 9:00 a.m. ***Pre-conference workshop registration and continental breakfast (breakfast included in workshop registration)***

9:00 a.m. – 12:00 p.m. ***Optional pre-conference workshop: Training DOs and Preventing Deficiencies***

With more advancement shops turning back to hiring, the talent pool for qualified development officer candidates is again shrinking. While a strong evaluation solution will help you get the most from your best talent, training your own DOs in-house can help you sustain your pool and maintain your most valued donor relationships. This workshop will help you lay the groundwork for the application of an appropriate evaluation solution through a discussion of:

- Structuring training modules and timelines
- Setting clear expectations
- Anticipating and preventing performance gaps

12:00 – 1:00 p.m. ***Lunch for pre-conference workshop participants (lunch included in workshop registration)***

**Solely
measuring
dollars raised
isn't the
best way to
evaluate your
development
officers.**

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AGENDA

TUESDAY, JUNE 19, 2012 (CONTINUED)

- 12:00 – 1:00 p.m. **Conference registration**
- 1:00 – 2:00 p.m. **Opening Remarks and Key Considerations When Choosing a Metrics Solution**
One size surely doesn't fit all, particularly in fundraiser evaluation. This introductory session will explore many of the pressing issues and challenges in quantifying major gift officer performance, suggest why it is fundamentally insufficient to measure results based solely on dollars raised, and offer a first-take range of possible measurement options.
- 2:00 – 3:15 p.m. **DO Metrics Solution I: The Kelley School of Business at Indiana University**
This session will detail the evaluation model currently running at Indiana University's Kelley School of Business. At work in a development/alumni shop of 9 development officers, 3 data integrity/IT specialists, and 4 support personnel associated with a major research university and governed by an academic dean, the Kelley School's point-based solution has been in place for 11 years. You will learn the rationale for Kelley's method and the successes it has brought.
- 3:15 – 3:30 p.m. **Afternoon break**
- 3:30 – 4:45 p.m. **DO Metrics Solution II: Brown University**
This session details the measurements used to focus fundraising activity at Brown, an institution with approximately 130 development staff, 35-40 of whom have front-line fundraising responsibilities. Its combination of "art and science" metrics takes both individual and team performances into account. You will learn the rationale for Brown's evaluation process and how reasonably complex, centralized development operations can function successfully and attract — then retain — high performers.
- 4:45 – 5:00 p.m. **Day I closing thoughts and Q&A**
- 5:15 – 6:15 p.m. **Networking reception (included in registration)**
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WEDNESDAY, JUNE 20, 2012

- 8:00 – 8:30 a.m. **Continental breakfast (included in registration)**
- 8:30 – 9:45 a.m. **DO Metrics Solution III: Small Shop Applications**
This session will explore the metrics possible in small shop settings, focusing especially on Maryville College. This small Tennessee liberal arts college staffed eight in its development shop, including only two major gift officers. Its compact but comprehensive advancement effort employed a point-based solution that used both individual and team performance metrics. You will learn the cultural foundations for Maryville's solution and how small shops can succeed with metrics.
- 9:45 – 10:15 a.m. **Morning break and hotel check-out**
- 10:15 – 10:45 a.m. **Looking Back: How the Solutions Addressed the Issues**
Looking back at the metrics solutions, the faculty will lead this interactive session to address converging ideas and complicating questions such as:
- How should teamwork be assessed and credit assigned to multiple officers?
 - What level of transparency — both shop-wide and between officers — is appropriate?
 - How should metrics vary for a novice officer as opposed to a seasoned professional?
- 10:45 a.m. – 12:00 p.m. **Working session: Starting to Build Your Own DO Metrics Solution**
Development officer performance goals should stress accountability and provide clear expectations. Working with your faculty's assistance, you will start to build evaluative metrics appropriate for the respective institutions.

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WEDNESDAY, JUNE 20, 2012 (CONTINUED)

12:00 – 1:00 p.m. **Lunch (included in registration)**

1:00 – 2:00 p.m. **Streamlining Your Solution through Improved Budget Management, Reports, and Staff Relationships**
A well-run advancement operation — and finely-tuned evaluation solution — will place an emphasis on development officers getting out of the office and visiting with prospects more frequently. That higher level of activity necessitates better shop support and communication. This session will explore the relationships between gift officers and their staffing colleagues to identify effective ways to collaborate and operate more efficiently.

2:00 – 2:15 p.m. **Afternoon break I**

2:15 – 3:15 p.m. **Tracking Your Solution and Technology Considerations**
A variety of tracking possibilities are available for managing your officers' activities, accomplishments, and opportunities for growth. After considering the options and cautions you should keep in mind when deciding how to track your solution, you will review one current system that uses technology to streamline metrics management. Features to be reviewed include:

- Calculations of the cost of dollars raised for each officer
- Report "grading" and tracking
- Displays that provide officers with their current performance statistics

3:15 – 3:30 p.m. **Afternoon break II**

3:30 – 4:45 p.m. **Building Buy-In and Implementing Your Solution**
Well-defined, thoughtful development officer metrics are worthless unless you have the buy-in and a strategy necessary to implement them. In this session, you will learn how to quantify your metrics plan to upper-level management in a way that convinces them to allocate the necessary startup and ongoing resources. Drawing on the work done during the course of the conference, it will also help you with the first steps toward implementing your plan at your institution.

4:45 – 5:00 p.m. **Conference closing thoughts/Q&A**

CFRE Continuing Education Credits

This Academic Impressions event has been approved for continuing education credits toward the CFRE International application for initial certification and/or recertification.

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INSTRUCTORS



Lead Instructor: Richard K. Dupree, Assistant Dean, Development and Alumni Relations, Kelley School of Business, Indiana University

A fundraising executive and consultant, Rick comes to the topic of evaluating alumni relations professionals with a broad background in advancement. Serving as a senior development professional for over 20 years, his expertise in designing metrics to evaluate advancement staff has led him to advise on the subject both domestically and abroad. Prior to his current role, Rick served on the development staff at the University of Evansville and as director of major gifts as well as managing director of capital campaigns for Michigan's Interlochen Center for the Arts.



Myrna K. Bizer, Senior Director, Regional Development, Brown University

Myrna has spent more than 15 years in the nonprofit world – 13 of them in higher education fundraising. She arrived at Brown in 2007 for the institution's \$1.6 billion "Boldly Brown" campaign and currently oversees her shop's fundraising work in Chicago, Texas, and New York City's principal gift pool. With comprehensive experience in campaign fundraising, prospect management, and volunteer management, she thrives within Brown's unique "Art and Science" development officer metrics solution. Myrna previously served in campaign leadership positions with the University of Rhode Island and Stetson University.



Kathy Drucquer Duff, Vice President, Philanthropy, Sharp HealthCare Foundation

An advancement professional with more than 15 years of experience, Kathy leads the Envision Sharp 2015 effort and coordinates the foundation's system-wide fundraising efforts. Prior to her current position, she served as associate vice president for San Diego State University, where she oversaw the institution's major gift fundraising, annual program, and gift planning efforts. In this role, she also assisted in developing the institution's strategy for its first comprehensive campaign and led its hospitality and tourism management program fundraising work. Before arriving at SDSU, Kathy spent seven years in destination management. A frequent speaker for the Annual Giving Professionals Network, Kathy also fundraises for the Del Mar Union School District.



Jason D. McNeal, Consultant, Gonser Gerber Tinker Stuhr, LLP

With more than a decade of institutional advancement and higher education administrative leadership, Jason joined GGTS in 2008. He provides counsel in the areas of major gifts, campaigning, planned giving, annual fund, board development, strategic planning, and integrated marketing. Prior to joining the firm, Jason served as vice president for advancement and community relations at Maryville College, where he led a highly successful advancement program, directed the institution's \$83 million "Our Window of Opportunity" campaign, and implemented its first development officer evaluation solution. Before arriving at Maryville, Jason served as director for advancement at East Georgia College, a two-year University System of Georgia institution.

HOTEL RESERVATIONS

The conference will be held at:
Hyatt Regency New Orleans
601 Loyola Ave
New Orleans, LA 70113

To reserve your room, call 888.421.1442. Please indicate that you are with the Academic Impressions group to receive the room rate of \$169 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of June 18 & 19. Reservations must be made by May 28, 2012. There are a limited number of rooms available at the conference rate. Please make your reservations early.

The Hyatt Regency New Orleans is conveniently located within walking distance of many of the city's most important entertainment venues and historical sites. The hotel is adjacent to the New Orleans Superdome and New Orleans Arena, blocks from the French Quarter, Morial Convention Center, and Mississippi River Front. Cab transportation is available both within the city and to and from the airport. Louis Armstrong – New Orleans International Airport (MSY) is approximately 12 miles (less than 20 minutes) away.



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Attend as a team – remember, if you register as a group, every fourth registrant is free. Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you. **Register online at www.academicimpressions.com**

REGISTRATION FEES

Your registration fee includes: full access to all conference sessions and materials, access to the networking reception on Tuesday, breakfast and lunch on Wednesday, as well as refreshments and snacks throughout the conference.

Postmarked on or before June 1, 2012

- Measuring and Evaluating Development Officer Performance _____ \$995 USD
- Measuring and Evaluating Development Officer Performance and pre-conference workshop _____ \$1295 USD
(For registrations postmarked after June 1, 2012, an additional \$100 fee per registrant applies)
- Pre-conference workshop _____ \$395 USD
- Check here if you have any dietary or accessibility needs. Please list any needs in the space below and we will do our best to accommodate you.

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) _____

CONFERENCE REGISTRATION INFORMATION (PLEASE PRINT CLEARLY)

Name _____ Name Preferred for Badge _____
Job Title _____ Institution/Organization _____
Address _____
City _____ State/Province _____ Zip/Postal Code _____ Country _____
Telephone _____ Fax _____ Email _____

For registration confirmations and pre-conference communication. (FOR ADDITIONAL REGISTRANTS, PLEASE COMPLETE ADDITIONAL FORMS.)

Additional Contact Name _____ Additional Contact Phone _____
Additional Contact Title _____ Additional Contact Email _____
Emergency Contact Name _____ Emergency Contact Phone (day) _____

FREE HIGHER ED NEWS AND ANALYSIS

Academic Impressions is happy to offer *Higher Ed Impact*, a free industry scan of news, trends, and fresh research on higher education, delivered in an easy-to-scan email.

- Sign me up for HEI: Daily Pulse** – impactful news, trends, and practices, sent daily
- Sign me up for HEI: Weekly Scan** – the week's most critical news, with analysis of top stories and trends, sent on Fridays
- Sign me up for HEI: Monthly Diagnostic** – practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

PAYMENT METHOD

We accept Visa, MC, and AmEx credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237.

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- Please invoice me
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(PO# not required to receive invoice)

REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by March 23, 2012. A \$100 processing fee will be assessed. After March 23, 2012 a credit (less \$100 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.