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FOR OUR CONFERENCE SPONSOR

the **TIMOTHY** group^{since 1990}
30 years of growing gift income

OVERVIEW — We know that wealth is a gift from God and that the earth and all its fulness belongs to him. As institutional fundraisers, we have the joy of connecting God's resources that he's entrusted to his servants with what God is doing at our institutions. The core of this process is the Annual Fund. It's the meat and potatoes of an effective fundraising department. This fall's advancement conference is focused on this vital area — *Building and Growing Your Annual Fund*. Join other ABHE fundraisers to sharpen your competency and expand your capacity for a growing legacy of resource development.

DAY 1 TUESDAY | OCTOBER 1, 2024

9:00 – 9:15 WELCOME AND INTRODUCTIONS — DAVID MEDDERS, EXECUTIVE VICE PRESIDENT | ABHE

9:15 – 10:00 SESSION 1: A FRESH LOOK AT ADVANCEMENT ACROSS ABHE – INSIGHTS FROM RESEARCH
PRESENTER: TODD PARRISH, VICE PRESIDENT OF ADVANCEMENT | WELCH COLLEGE (TN)

OVERVIEW: Wouldn't you love to know how your advancement strategy and results compare with other ABHE institutions? What can we learn from the goals and strategy of others? What light can this shed on your own plans and expectations? Review key findings from recent doctoral research specifically targeting fundraising practices across ABHE.

- ▶ Reviewing the research methodology — scope and focus
- ▶ Digging into the research insights — key findings
- ▶ Considering implications — so now what?

10:00 – 10:30 Q & A DISCUSSION

10:30 – 10:45 REFRESHMENT BREAK

10:45 – 11:30 SESSION 2: CULTIVATING MAJOR DONORS THROUGH YOUR ANNUAL FUND
PRESENTER: PAT MCLAUGHLIN, CEO | THE TIMOTHY GROUP (MI)

OVERVIEW: As in all fundraising efforts, major donors play a decisive and disproportionate role. But often, an Annual Fund strategy doesn't tap the potential of major donors for producing exceptional results. Consider ways to expand your Annual Fund with an effective strategy for major donor identification, cultivation, and engagement. Understand how this prepares the way for your next capital campaign. Consider insights from a distinguished consultant who specializes in major donor engagement.

- ▶ Understanding the heart and thinking of your major donors toward your Annual Fund — motivations
- ▶ Knowing the potential and actual role of your major donors in your Annual Fund — a reality check
- ▶ Developing a specific strategy for major donor Annual Fund engagement — the plan
- ▶ Managing key relationships — wisdom and assignments

11:30 – 12:00 Q & A DISCUSSION

12:00 – 12:15 A WORD FROM OUR SPONSOR — THE TIMOTHY GROUP — PAT MCLAUGHLIN

12:15 – 1:00 LUNCH — CATERED AT THE ABHE DINING ROOM

1:00 – 1:45 SESSION 3: EFFECTIVE LEADERSHIP FOR GROWING YOUR ANNUAL FUND
PRESENTER: TERRY MUNDAY, RETIRED VP FOR UNIV. ADVANCEMENT | INDIANA WESLEYAN UNIVERSITY (IN)

OVERVIEW: The bread and butter of every advancement team is the Annual Fund. It produces the steady and growing stream of donations that bridge the gap between tuition revenue and the cost of students' education. Consider a variety of events and initiatives that could grow your Annual Fund with a distinguished advancement leader from two decades of growing his own Annual Fund.

- ▶ Turning your annual fund from good to great — developing a plan
- ▶ Creating a sense of urgency in the annual fund — not business as usual
- ▶ Starting new initiatives that can tap new donors — donor acquisition
- ▶ Adding the extra sauce — being creative

1:45 – 2:15 Q & A DISCUSSION

2:15 – 2:30 REFRESHMENT BREAK



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ADVANCEMENT LEADERS CONFERENCE OCTOBER 1-2, 2024

DAY 1 CONT'D

2:30 – 3:15 SESSION 4: BUILDING AN EFFECTIVE PLANNED GIVING MINISTRY

PRESENTER: CLAY PERKINS | EXECUTIVE VICE PRESIDENT, FINANCIAL PLANNING MINISTRY (CA)

OVERVIEW: Does your advancement team effectively engage in planned giving . . . or just make excuses? An effective Annual Fund strategy must include BOTH immediate donations AND planned giving goals. Learn from an expert what this could look like for your institution and chart a practical course to ensure your institution's financial future. What are the typical barriers institutions face to include legacy gift solicitations in their Annual Fund strategy and events?

- ▶ Grasping the potential of planned giving — a reality check
- ▶ Integrating planned giving in your advancement strategy — synergy
- ▶ Including legacy gift requests in your Annual Fund strategy — practical steps
- ▶ Setting appropriate goals and reaching them — working smart

3:15 – 3:45 Q & A DISCUSSION

3:45 – 4:00 WRAP-UP

4:00 – 5:00 REFRESH & RELAX — HILTON GARDEN INN

5:00 DINNER OFF-SITE — YOUR PIE (PIZZA) — SPONSORED BY FINANCIAL PLANNING MINISTRY

DAY 2 WEDNESDAY | OCTOBER 2, 2024

9:00 – 9:15 INSIGHTS FROM THE WORD — DAVID MEDDERS

9:15 – 10:00 SESSION 5: THE PRESIDENT AS A CHIEF FUNDRAISER

PRESENTER: BILL KORVER, PRESIDENT | CAROLINA COLLEGE OF BIBLICAL STUDIES (NC)

OVERVIEW: While every president serves as institutional CEO, they also have a special responsibility for resource development. Regardless of giftedness or temperament, they are a chief fundraiser. So, what does this look like for an effective president? How are the responsibilities balanced? What is the best role they can play in the overall fundraising strategy? Consider insights from a distinguished president who's made this a priority for two decades.

- ▶ Understanding the impact of presidential fundraising — the right mindset
- ▶ Setting goals and embracing roles — the right strategy
- ▶ Cultivating legacy donors — the right relationships
- ▶ Getting in stride — the right disciplines

10:00 – 10:30 Q & A DISCUSSION

10:30 – 10:45 REFRESHMENT BREAK

10:45 – 11:30 SESSION 6: ROUNDTABLE DISCUSSIONS

OVERVIEW: Discuss the most pressing advancement/fundraising issues you are facing with both the panel of presenters and attendee affinity groups. Create a draft of your *Personal Action Plan* based on the most significant and urgent issues you should address following the conference.

11:30 – 12:00 Q & A DISCUSSION AND WRAP-UP

12:00 – 1:00 CLOSING BOXED LUNCH



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