

WITH GRATEFUL APPRECIATION
FOR OUR CONFERENCE SPONSORS



OVERVIEW — The Word of God is clear — all wealth comes from and belongs to God. As institutional leaders engaged in resource development, we have the joy of helping God's people see purpose in the resources entrusted to them through the investment in our students and mission. Building both the Annual Fund including Legacy Giving is the core resource development process for institutional strength and flourishing. Anointed leaders are constantly expanding their fundraising capacity and sharpening their fundraising competency. That's the focus of this fall's Advancement Leaders Conference. Network with other leaders and be refreshed with new ideas and opportunities.

DAY 1 TUESDAY | SEPTEMBER 30

BUILDING YOUR ANNUAL FUND — A SOLID FOUNDATION

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

9:15 – 10:00 SESSION 1: ESSENTIAL STEPS TO INCREASE YOUR ANNUAL FUND

PRESENTER: TERRY MUNDAY, RETIRED VP FOR UNIV. ADVANCEMENT | INDIANA WESLEYAN UNIVERSITY (IN)

OVERVIEW: Every flourishing institution has a strong and growing Annual Fund. This is the core of donor engagement and charitable contributions which are a lifeline for our institutions. Thus, this is a key competency for the entire advancement team. Success will be an essential part of securing your institutions future. Think with a veteran fund raiser how to enhance your efforts and build your best Annual Fund.

- ▶ Tracking metrics that create success for the annual fund — the right numbers
- ▶ Spending less time managing lists and more time building relationships — it's about people
- ▶ Reaching people who care about your cause — the right focus
- ▶ Creating events that build relationship — creative opportunities

10:00 – 10:30 Q & A DISCUSSION

10:30 – 10:45 REFRESHMENT BREAK

10:45 – 11:30 SESSION 2: CATCHING A VISION FOR LEGACY GIVING

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

OVERVIEW: Have you caught a vision for legacy giving? Does your leadership team grasp the incredible potential and enormous transfer of wealth currently underway? These are only some of the compelling reasons your institution should be aggressively involved in helping your donors think forward about their planned giving. Take a fresh look through the eyes of an expert legacy giving leader and consider what this could look like for your institution's future.

- ▶ Seeing the potential donors for planning giving in your current donor pool — a fresh look
- ▶ Seizing the initiative — simple ways to get started
- ▶ Starting now reaps huge results later — the patience of a farmer
- ▶ Setting goals and executing follow up — action pays off

11:30 – 12:00 Q & A DISCUSSION

12:00 – 12:15 A WORD FROM OUR SPONSOR — REVELATE.TRAVEL BY NTS | DAVID WELCH

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

1:00 – 1:45 SESSION 3: THINKING OUTSIDE THE BOX FOR ADVANCEMENT MARKETING

PRESENTER: BART CAYLOR, PRESIDENT | CAYLOR SOLUTIONS (IN)

OVERVIEW: It's no secret that generative AI is establishing itself as a key tool for enhancing marketing and communications. But there's so much more it can help with in the important work of advancement. Enhance your understanding and sharpen your skills for integrating genAI into your advancement workflow. Learn from a higher ed expert and leader in applying AI about how this tool is a new must for your advancement toolbox.

- ▶ Moving from efficiencies to enhancements using generative AI
- ▶ Understanding how AI can enhance your advancement efforts — seeing the potential
- ▶ Turning AI into your advancement collaborator — simple steps to get started
- ▶ Considering creative ways to use generative AI in your normal advancement tasks — unlearning old ways

1:45 – 2:15 Q & A DISCUSSION

2:15 – 2:30 REFRESHMENT BREAK

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ADVANCEMENT LEADERS CONFERENCE SEP 30—OCT 1, 2025

DAY 1 CONT'D

2:30 – 3:15 **SESSION 4: CULTIVATING DONORS THROUGH ADVANCEMENT TOURS AND CRUISES**

PRESENTER: DAVID WELCH, VICE PRESIDENT | REVELATE.TRAVEL BY NTS

OVERVIEW: Hosting mission-aligned travel experiences is a powerful way to deepen donor relationships, engage alumni, and showcase the impact of your institution. Explore how thoughtfully planned tours can strengthen advancement goals, spark generosity, and expand your community's reach.

- ▶ Discovering how mission-driven travel experiences can cultivate deeper donor relationships
- ▶ Learning the building blocks of a sustainable alumni/donor travel program
- ▶ Gaining insider insight on partnering with experienced travel providers
- ▶ Exploring how smaller schools can start small but think strategically about using travel

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 — A WORD FROM OUR DINNER SPONSOR — FINANCIAL PLANNING MINISTRY | CLAY PERKINS**

DAY 2 WEDNESDAY | OCTOBER 1, 2025

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

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

PRESENTER: STEVE LENNOX, PRESIDENT EMERITUS | KINGSWOOD UNIVERSITY (NB)

OVERVIEW: Very few of our presidents are hired because of their experience and expertise as fundraisers. Yet, the president's role calls for this very thing — to be an effective voice and leader in resource development. Hear from a veteran president how he stepped into this role and the lessons learned along the way that cultivated both skills and a heart for donor development and fundraising. Learn from his journey and take your fundraising ministry to the next level.

- ▶ Embracing the responsibilities for fundraising — the right heart and mindset
- ▶ Engaging in the institution's resource development strategy — the right role
- ▶ Reaching out to the right donors — the right connections
- ▶ Presidential communications — a key part of relationship cultivation

10:00 – 10:30 **Q & A DISCUSSION**

10:30 – 10:45 **REFRESHMENT BREAK**

10:45 – 11:30 **SESSION 6: THE FUEL FOR A SUCCESSFUL CAMPAIGN**

PRESENTER: RICH CUMMINGS, PRESIDENT | THE TIMOTHY GROUP (MI)

OVERVIEW: The great challenge of every advancement team is leading a successful capital campaign. Of course this begins with an effective annual fund. So what is the most effective bridge from your work every year in the annual fund in preparation for your next capital campaign. Think through the links in this vital process and prepare well for your institution's future campaign.

- ▶ Reviewing your Annual Fund through the lens of a future capital campaign
- ▶ Identifying the key donors from now to the future
- ▶ Building relationships with the future in mind

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

12:00 – 1:00 **CLOSING LUNCH**



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