



2021 PROGRAM DETAILS

This keystone Foundation for Fraternal Excellence program is focused on job-function skill-building and learning from peers in the field. New and mid-career professionals benefit the most. For 2021, Advance will continue its two-track virtual format with Annual Giving (annual fund, campaigns, programs, communications) followed by Road Warriors (development, major gifts, face-to-face fundraising) with both tracks heavily focused on tactics, innovations and real-world experiences.

- **PRE-CON WELCOME:** Newcomer orientation March 26.
- **ANNUAL GIVING TRACK:** March 30 and 31.
- **ROAD WARRIORS TRACK:** Fundamentals Workshops, April 20 and 21; Cohort Series continues on subsequent Fridays, April 30, May 7, May 14 and May 21.

Advance will be operated entirely over Zoom, with significant use of small group discussion via the Breakout Room feature. Attendees should plan to have their cameras and audio connections enabled. Advance's success depends on attendees showing up authentically, intentionally and ready to engage in meaningful discussion.

- **REGISTRATION COST:** FFE member rates: Single track, \$100 per person; Dual track, \$150 per person.
- **SIGN UP!** Full details and register now at foundationfe.org/advance/


OPTIONAL WELCOME NEWCOMER ORIENTATION

This session focuses on the basics of the fundraising cycle and development terminology, opportunities for engaging with FFE and how to maximize the Advance experience. Professionals who are new to the industry or those who have been in their current role for two years or less are the ideal audience for this session. All sessions in the Newcomer Orientation will be facilitated by FFE Executive Director Ashley VanDewark and the Advance Planning Committee.


PRE-CON	FRIDAY, MARCH 26
Time (Eastern)	Program Component
2:00 pm – 2:30 pm	Fundraising Cycle Learning objectives: Why you and your organization need a comprehensive fundraising plan. Outlining the four major areas of fundraising strategy and where your role fits.
2:30 pm – 3:00 pm	Types of Giving Learning objectives: Building blocks of fundraising including annual giving, major gifts, planned giving and campaigns. Types of donors and where these individuals fit into your portfolio. Specific aspects and tactics in these areas related to fraternal fundraising.
3:00 pm – 3:30 pm	Annual Fund Basics Learning objectives: How direct mail fits into your strategy. Digital marketing in 2021 and beyond. The importance of stewardship.
3:30 pm – 4:00 pm	Your FFE Network FFE members go further together. Our foundation operates to advance the various needs of the dynamic fraternal foundation industry. We will discuss the ways you, personally, and your organization benefit from engaging through FFE!

This track dives into the components and strategy of annual giving specific to fraternal fundraising.

ANNUAL GIVING TRACK

DAY 1	TUESDAY, MARCH 30
Time (Eastern)	Session Details
1:00 pm – 2:00 pm	Welcome: Celebrating Successes from 2020 ROUNDTABLE We made it through 2020 ... now let's shine in 2021! Advance will help participants stay ahead of the curve and innovate with new projects this year. This kickoff session will set the stage for success as participants share in a guided discussion and begin networking.
2:00 pm – 3:00 pm	Building Your Case for Unrestricted Support WORKSHOP Learning objectives: Explain to donors why operating funds are necessary and where their gifts fit into the larger organization picture. Build a case to bring your existing restricted or housing donors into the annual fund. Share how the COVID-19 pandemic is affecting students and chapters and identify how unrestricted gifts can have a direct impact.
3:00 pm – 4:00 pm	 Try This! PRESENTATIONS Try This! sessions are live short-form educational breaks to give a quick pick-me-up lesson on a dynamic topic keyed in to today's virtual-essential fundraising world like email campaign automation, data benchmarking, online planned giving tools and cross-connecting your software.
4:00 pm – 5:00 pm	Meaningful Thank-Yous WORKSHOP Learning objectives: How to ensure your stewardship process is truly meaningful to the donor — and also to the messenger. Why you need to build time into your week for this work. Connect the donor's broader philanthropic priorities to your organization in a significant way.

DAY 2	WEDNESDAY, MARCH 31
Time (Eastern)	Session Details
12:15 pm – 12:45 pm <i>Optional</i>	Lunch and Learn Digest what you learned on Day 1 as we bite into the second day of Advance. This casual networking session will allow you to discuss what you've learned so far and meet other attendees. FFE hosts will share additional resources and expert sources that you may find helpful.

1:00 pm – 2:00 pm	Mail Trends WORKSHOP Learning objectives: Current trends in direct mail coming out of 2020. Planning ahead for 2021 mailings. The impact direct mail has on different generations. Managing postal service and shipping provider issues.
2:00 pm – 3:00 pm	Virtual Engagement WORKSHOP Learning objectives: How to make your signature event special. How is your organizing prioritizing online giving and crowdfunding, particularly in regard to chapter giving. What do individual donors and volunteers want in virtual meetings and networking functions.
3:00 pm – 4:00 pm	 Try This! PRESENTATIONS Try This! sessions are live short-form educational breaks to give a quick pick-me-up lesson on a dynamic topic keyed in to today's virtual-essential fundraising world like email campaign automation, data benchmarking, online planned giving tools and cross-connecting your software.
4:00 pm – 5:00 pm	Project Management WORKSHOP Learning objectives: What aptitudes and skills you need to succeed at this core competency. Calendar, project software and tracking apps available to help. How to acknowledge that sometimes taking a break or stepping away is needed so you can come back stronger. How to wear many hats with style.

This track offers a focus on increasing fundraising success and a fulfilling professional experience. Registrants have the option to take part in the 101-level Fundamentals Workshops and/or the 201-level Cohort Series.

ROAD WARRIORS FUNDAMENTALS WORKSHOPS

DAY 1	TUESDAY, APRIL 20
Time (Eastern)	Session Details
1:00 pm – 1:45 pm	Welcome: Celebrating Successes from 2020 ROUNDTABLE We made it through 2020 ... now let's shine in 2021! Advance will help participants stay ahead of the curve and innovate with new projects this year. This Road Warriors kickoff session will set the stage for success as participants share in a guided discussion and begin networking.
1:45 pm – 2:30 pm	Fundraising in Today's Environment ROUNDTABLE Life (and fundraising) as we know it has changed in the past year and will likely never be the same. Certainly there have been challenges and disappointments in

	dealing with never-ending cancellations and social distancing, but there also have been bright spots and new opportunities. We'll look at lessons learned in 2020 and discuss how the virtual landscape is changing fundraising ... <i>for good</i> .
2:30 pm – 3:30 pm	<p>Discovery Fundamentals</p> <p>WORKSHOP</p> <p>Learning objectives: Overview of the major gifts cycle and how to move contacts through the process. Identify your prospects and build a strategy.</p> <p><i>All workshops in the Road Warriors Fundamentals Workshops will be facilitated by Jeff Hilperts, Senior Associate, Bentz Whaley Flessner.</i></p>
3:30 pm – 5:00 pm	<p>Cultivation Fundamentals</p> <p>WORKSHOP</p> <p>Learning objectives: How to build a plan that grows your engagement with individual and subgroups of donors. Learn some of the best tools available and best questions to ask to build a relationship with a potential donor.</p>

DAY 2	WEDNESDAY, APRIL 21
Time (Eastern)	Session Details
12:15 pm – 12:45 pm <i>Optional</i>	<p>Lunch and Learn</p> <p>Digest what you learned on Day 1 as we bite into the second day of Advance. This casual networking session will allow you to discuss what you've learned so far and meet other attendees. FFE hosts will share additional resources and expert sources that you may find helpful.</p>
1:00 pm – 2:30 pm	<p>Solicitation Fundamentals</p> <p>WORKSHOP</p> <p>Learning objectives: Know when it's time to make the ask. The art of having strong, clear communication. Avoid common fundraiser pitfalls.</p>
2:30 pm – 4:00 pm	<p>Stewardship Fundamentals</p> <p>WORKSHOP</p> <p>Learning objectives: How and why to say thank you. How to share gratitude and expand your impact.</p>
4:00 pm – 5:00 pm	<p>Donor Stories and Lessons Learned</p> <p>ROUNDTABLE</p> <p>In the last Fundamentals Workshop, participants will share their own donor stories — the good, the bad, and the ugly. This closing roundtable will send Road Warriors into the Cohort Series with a mindset for success and eagerness to learn more.</p>

After learning the basics in the fundamentals 101 workshops, build ongoing connections through a weekly 201-level cohort series that allows for a deep dive into specific individual projects. You will be asked to prepare information on real-life examples from your day-to-day activities to discuss with the group as part of this cohort's coursework. All series discussions are Fridays from 11:00 am – 1:00 pm Eastern.

The Cohort Series will be facilitated by **Jeff Hilperts**, Senior Associate, Bentz Whaley Flessner and **Justine Rosenberg Thomas**, Director of Advancement, Kappa Alpha Theta Foundation. Additional topical experts in the subject of the week will be invited to provide additional context — stay tuned!

ROAD WARRIORS COHORT SERIES

COHORT	FRIDAYS IN APRIL/MAY
Day/Time (Eastern)	Session Details
APRIL 30 11:00 am – 1:00 pm	Cultivation: How to Get and Run a Successful Meeting Who's in your portfolio? What steps did you take that secured a key meeting? What works in a virtual meeting compared to an in-person connection? Practical application discussion: Specific cases, questions, tools.
MAY 7 11:00 am – 1:00 pm	Solicitation (Part 1): Major Gift Proposals How did you clearly communicate your organization's needs? What allowed you to build a strong bond with the donor(s)? Practical application discussion: What goes in your successful proposal. How you are stewarding a major gift.
MAY 14 11:00 am – 1:00 pm	Solicitation (Part 2): Blended Asks and Securing Planned Gifts Connecting donor's personal philanthropic goals with your organization's long-term plan. Practical application discussion: What are the unique benefits of a blended ask? What does the outreach for planned gifts look like in 2021?
MAY 21 11:00 am – 1:00 pm	Stewardship: Completing (and Resetting!) the Cycle What should be your next steps after a successful solicitation? Immediate and long-term outreach planning. Why strong stewardship may be the best way to cultivate the next gift. Practical application discussion: What techniques received the strongest donor response. Meaningful follow-up tips.