



Summit

Date/Time	Program Component/Speaker	Location
Sunday, Jan. 15, 2023		
5:00 pm – 8:00 pm	Invitation Only: FFE Board of Directors Dinner	Meet in Lobby Bar
Monday, Jan. 16, 2023		
9:00 am – 3:00 pm	Invitation Only: FFE Board of Directors Meeting	The Cape – A-Frame I
5:00 pm – 5:30 pm	First Time Attendee Registration and Orientation	The Cape – A-Frame II
5:30 pm – 6:00 pm	Returning Attendee Registration	The Cape – A-Frame II
6:00 pm – 7:00 pm	Welcome Reception	The Cape – Poolside Terrace
7:00 pm – 9:00 pm	Welcome Dinner	The Cape – Glimpse (Rooftop)
Tuesday, Jan. 17, 2023		
7:00 am – 8:00 am	Breakfast	The Cape – Manta
8:00 am – 8:30 am	Kick-Off	The Cape – A-Frame
8:30 am – 11:30 am	Educational Block 1 <ul style="list-style-type: none"> Speaker Workshop: Branding for Personal and Professional Success with R. Ethan Braden 	The Cape – A-Frame
11:30 am – 12:30 pm	Lunch	The Cape – Manta
12:30 pm – 3:00 pm	Educational Block 2 <ul style="list-style-type: none"> Facilitated Group Discussion and Peer Learning: Building Culture that Creates Effectiveness and Efficiency; Driving Strategy with Data (Including Men’s and Women’s Breakouts) TED Talks: ChapterSpot; Pursuant Giving DNA and Alpha Chi Omega Foundation <p>Maintaining a Culture of Data Consistency <i>Joe McMenemon and Joe Budde, ChapterSpot</i> Problems are solved with consistent data and processes. By creating a culture of data consistency, you’re giving your team the power to elevate and transform your foundation operations. In this session, you’ll learn what data consistency is and what you can do once you</p>	The Cape – A-Frame

clean up your data (hint: add a ton of awesome features!). *Small group activity and discussion to follow.*

Life at ChapterSpot: Managing a Remote Team

Joe McMenemon and Joe Budde, ChapterSpot

The way we work has changed, so let's change with it! Remote work may come with some challenges, but it also comes with great opportunities. At ChapterSpot, we embrace remote work and focus on our team's output instead of managing each person's schedule. Learn how we create a strong team dynamic using tools like Slack to promote communication, avoiding rules that cause discrepancies, and investing in consistent processes/workflows. *Small group activity and discussion to follow.*

Data Driven Decision Making for Organizational Success

Alicia Lifrak, Pursuant | Giving DNA and Marsha Grady, Alpha Chi Omega Foundation

How your organization manages and utilizes data to drive decision making and strategy will be the key to your "what's next?" No matter where you are in your organization's data journey, this Talk will provide tips and tools to put you on the path to success.

This session will focus on why data decisions matter when it comes to fundraising effectiveness, short term and long-term planning, audience segmentation and messaging personalization, and overall organizational efficiencies. Where and how to invest in your data will directly impact your return on investment. Its more than just collecting data, it's how you actually *use* it!

- **FFE Updates:** Fraternities Matter Campaign; Women's Research Fund

3:00 pm	Casual Reception	The Cape – Lobby Bar
5:15 pm	Offsite Dinner: Toro	Meet in Lobby Bar

Date/Time	Program Component/Speaker	Location
Wednesday, Jan. 18, 2023		
7:30 am – 8:30 am	Breakfast	The Cape – Manta
8:30 am – 11:30 am	Educational Block 3 <ul style="list-style-type: none"> • Speaker Workshop: Branding for Organizational Success with R. Ethan Braden 	The Cape – A-Frame
11:30 am – 12:45 pm	Lunch	The Cape – Manta
12:45 pm – 1:00 pm	Group Photo	The Cape – Poolside
1:00 pm – 3:30 pm	Educational Block 4 <ul style="list-style-type: none"> • Facilitated Group Discussion and Peer Learning: Leading Capital Campaigns (Including Men’s and Women’s Breakouts); Looking to the Future – Driving Progress for Our Foundations • TED Talks: Pennington & Co.; Trek Advancement <p>Pennington & Co. <i>Bob McKenney, Pennington & Company</i></p> <p>Why Planned Giving is My Love Language <i>Kelly Wesley Taylor, Trek Advancement</i> Are you and your donors speaking the same language? While charitable giving is a feel-good action, it can also be very confusing for the donor to know how and what to give. If giving is an expression of hope for a better future, how are you working with your donors to unlock the full complement of their giving potential? This "self-help" talk focuses on seeing from a new perspective that will allow you and your Foundation to meet donors where they are.</p> <p>Small Group Activity and Discussion: Planned Giving Beyond Bequests <i>Kelly Wesley Taylor, Trek Advancement</i> In this facilitated session we will talk about broader charitable gift planning tools, how and when to use them and how you can move your individual giving strategies forward without significant financial or staff investment. Also, we will discuss potential collective solutions for expanded planned giving program administration and support.</p> <ul style="list-style-type: none"> • FFE Updates: Education and Benchmarking Committee 	The Cape – A-Frame
3:30 pm	Casual Reception	The Cape – Lobby Bar

6:00 pm	Dinner	On Your Own
Thursday, Jan. 19, 2023		
7:30 am – 8:30 am	Breakfast	The Cape – Manta
8:30 am – 10:00 am	Closing Session	The Cape – A-Frame
10:00 am	Departures	On Your Own