



## 2020 REGIONAL ADVANCEMENT CONFERENCE

January 12 – 14, 2020

Tampa International Airport - Marriott Hotel

### SUNDAY: JANUARY 12

Afternoon Arrivals/Check-In

- 4:45pm Meet for transport (*Front Desk on Lobby Level*)
- 5:00pm Transport to Jesuit High School of Tampa, FL (*4701 N. Himes Ave. Tampa, FL 33614*)
- 5:30pm Mass in Sacred Heart Chapel
- 6:15pm Campus Tour
- 7:00pm Cocktails/Dinner (*Multi-Purpose Room*)
- 9:00pm Shuttle to Tampa Airport Marriott Hotel

### MONDAY: JANUARY 13

- 8:00am Breakfast Buffet (*Grand Ballroom West*)
- 9:00am Welcome and Morning Examen (*Grand Ballroom West*)
- 9:15am **General Session: *Think Up and achieve your fund-raising goals*** (Jerry Smith, JF Smith Group) (*Grand Ballroom West*) Everyone can "think up," we just have to learn to cultivate that ability. To "think up" is to learn to think more creatively and put our heads together to succeed. This session will show you how that applies to fund-raising. Attendees will learn about concrete ways to "think up" big, bold, exciting ideas and time-proven methods of putting those ideas to work making contacts, cultivating relationships, and closing the deal.
- 10:15am Break
- 10:30am **General Session: DonorSearch** (Sarah Tedesco, DonorSearch) (*Grand Ballroom West*)  
What can we expect next for research and the next generation of donors? In this presentation you will learn how to successfully identify major gift donors and discuss how to engage the next generation of donors. Sarah will talk in-depth about the key indicators of philanthropic potential, and how the technology, world, and industry is changing as the next generation comes into its own.
- 11:30am Break

12:00pm Lunch (*The Café located on the Lobby Level*)

1:15pm Afternoon Examen

1:45pm Breakout Sessions:

***Student-Alumni Entrepreneurship Expedition*** (Ed Franchi St. Xavier High School, Cincinnati, OH) (*Lee Room*) St. Xavier led a group of 20 students to Silicon Valley for a five-day Entrepreneurship Expedition. More than 20 benefactors assisted as hosts and speakers, and the trip concluded with an event that drew alumni from the area. Learn how that served as a major cultivation experience for them and how it can benefit your school.

***Video Storytelling: Events, Online and Beyond*** (Melissa Murphy, St. Ignatius High School, Cleveland, OH) (*Collier Room*) How to effectively produce and present video storytelling at events. Working in conjunction with Communications to tell stories that inspire your community to support your mission. Shared here are some tricks of the trade that may help your institution.

***Strategic Visioning for Success*** (John Chandler, St. Ignatius High School, Chicago, IL) (*Pasco Room*) Beginning the process of a strategic plan involves the participation and engagement of many different groups within the school's community. Monitoring the outcomes in the plan is a task that needs to be updated yearly. Setting goals is important but developing strategies to execute those goals more so. Experience a walkthrough of a strategic planning process.

***Comprehensive Prospect Rating: The JFSG Way*** (Mark Martin and Steve Jankiewicz, JF Smith Group) (*Grand Ballroom West*) The JFSG has updated their prospect rating system based upon their experience working with hundreds of clients. This approach provides actionable information for gift officers as they start the solicitation process. Portfolios can be created with a list of prospects that have a much greater upside and potential for significant gifts.

3:00pm **Tradeshow** (*Grand Ballroom West*)

4:45pm Meet for transport (*Front Desk on Lobby Level*)

5:00pm Transport to Jackson's Bistro (*601 S. Harbour Island Blvd., Tampa, FL 33602*)

5:30pm **Cocktails, Presentation, and Dinner at Jackson's Bistro – Sponsored by Events.org (David Hassen)**  
Learn how Events.org can help you manage your event from A-Z.

Shuttle will transport everyone back to the Tampa Airport Marriott Hotel after dinner.

## **TUESDAY: JANUARY 14**

8:00am Breakfast Buffet (*Grand Ballroom West*)

9:00am Welcome and Morning Examen (*Grand Ballroom West*)

9:15am **General Session: Guiding Trends in Philanthropy** (Peter Hoskow, CCS Fundraising) (*Grand Ballroom West*) Keeping apprised of the latest trends in philanthropy can help advancement leaders most effectively maximize donor strategy and engagement. Join us as we analyze trends that matter most in philanthropy today, with a focus on secondary school philanthropy. We will offer recommendations on applying these trends and best practices to fundraising for Jesuit and secondary education organizations to help you achieve your increasingly ambitious goals.

10:15am Break

10:30am Breakout Sessions:

***“It’s all about Relationships!” How to Build a Supportive and Sustainable Young Alumni Base***

(Nick Vargas and Doug Pearson, St. John’s Jesuit High School, Toledo, OH) (*Lee Room*) One of the biggest struggles in fundraising is how to engage younger alumni – and get them to donate. Join us to learn about the Young Alumni Council at St. John’s Jesuit High School & Academy (Toledo, OH) that has over 25 members under the age of 40 giving at a significant level. Nick Vargas and Doug Pearson will share with you how this initiative was developed and implemented over the last year.

***“All In?” Why it Makes Sense to do a Comprehensive Campaign***

(Tony Schad & Ralph Nardini, St. Xavier High School, Cincinnati, OH) (*Grand Ballroom West*)

***School Communications in an Ever-Changing Media and Social Media Landscape***

(Pete Young, Jesuit High School, Tampa, FL) (*Collier Room*) The media has changed dramatically over the past 10 years while social media has exploded, emerging as a critical messaging component for your school. Learn strategies for building key relationships with local media and for connecting with your school’s essential constituencies across the primary social media platforms.

***Maximizing Parents’ Participation to your Annual Fund*** (Molly Smith, Jesuit High School, Tampa, FL)

(*Pasco Room*) School parents are arguably your closest constituency at any given time, but their years with you are short. We’ll discuss strategies for promptly establishing a culture of giving with your parent base, which includes setting timelines, determining customized asks, and stewardship that leads to the next gift. Learn how Jesuit High School of Tampa executes their Parents’ Annual Giving campaign and plan to swap ideas for success in an open discussion.

11:15am Break

11:30am **General Session: Q & A Panel with Million Dollar Donors for Fundraising Do’s and Don’ts**

(Nick Suszynski, Jesuit High School of Tampa, FL) (*Grand Ballroom West*) Hear directly from transformational donors on what truly motivates them to make seven-figure gifts, and what advancement officers might do (or not do) that turns them away.

12:30pm Lunch (*The Café located on the Lobby Level*)

1:30pm Breakout Sessions:

***“What Are Our Choices?” Choosing the Right Consulting and Coaching for You and Your School***

(Ralph Nardini, St. Xavier High School, Cincinnati, OH) (*Lee Room*) Whether you are a small school or big school, small shop or big shop, at some point you are going to want to bring in someone to help you and your team. Let’s talk about what type of services you need and how to find the best consultant to partner with you. You might just be looking to outsource your yearly segmentation and annual giving solicitation strategy or need more in-depth ongoing coaching and campaign help. No matter your needs, we will discuss how to find the right person to enhance your talents, your team’s talents and help move your school forward in the process.

***“Sellebrate!” Maximizing Anniversaries for Strategic Value*** (Ryan Bergin, St. Ignatius College Prep, Chicago, IL)

(*Collier Room*) Whether it’s 20, 50, or even 100 years, celebrating your school’s anniversary is a great way to re-engage your entire school community. Find out what has worked, and hasn’t worked, for Saint Ignatius College Prep Chicago as they celebrate their 150<sup>th</sup> this year.

**“Highfalutin’ Homecomings”** (*Jesuit College Prep, Dallas, TX*) (*Pasco Room*) Jesuit Dallas alumni representatives discuss their week of activities during their annual Jesuit Dallas Homecoming celebration. Events occurring during the week include their Sons of Alums breakfast, Distinguished Alumna Dinner, 5 Year Class reunion gatherings, Alumni Family Day, their Homecoming Concert and culminating in their annual Alumni Memorial Mass.

**Seven Steps for Building a Solid Planned Giving Program** (*Nick Suszynski, Jesuit High School, Tampa*) (*Grand Ballroom West*) Learn how to grow your planned giving program from the ground up for tangible results.

2:30pm Break

2:45pm **Keynote Presentation: Expectations for Advancement Professionals from a Jesuit High School President** (Rev. Richard Hermes, S.J., President, Jesuit High School of Tampa, FL) (*Grand Ballroom West*) Understand the expectations a Jesuit high school president has for its development office.

3:45pm Break

4:00pm Happy Hour Social (*Garden Terrace*)

5:30pm Dinner on Your Own/Regional Reunions Encouraged

### **WEDNESDAY: JANUARY 15**

7:00am – 10:00am Grab & Go Breakfast/Departures