Global Perspectives on Major Donor Fundraising

Sharing Successes and Failures Between Sectors, Cultures and Economies

Thursday 6 - Friday 7 November 2008
Hotel Russell, London, United Kingdom

Paul Schervish
USA
Paul is Professor of Sociology and Director of the Center on Wealth and Philanthropy at Boston College and National Research Fellow at the Indiana University Center on Philanthropy.

Ellen Sullivan
USA
Ellen is Director of Corporate and Foundation Relations at Harvard. She has been a member of the professional staff at Harvard University for the past 18 years.

Mayan Quebral
Philippines
Mayan is the Executive Director of Philippine based not-for-profit organisation Venture for Fund Raising.

Key conference topics include:
Best practice in major donor development
Engaging senior management, the board and trustees
Understanding major donors and managing expectations
Developing outstanding donor stewardship programmes

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www.institute-of-fundraising.org.uk/global
Join fellow fundraisers from around the world at this special two day event designed to address the unique requirements of major donor fundraising. For the first time, the Institute of Fundraising and the Association of Fundraising Professionals (AFP) join forces to bring you the ‘best in class’ educational opportunities to improve your skills and positively impact on your major donor goals. With a global selection of speakers and delegates from such locations as North America, Europe and Asia, the event will benefit an international audience.

The exceptional programme focuses on different donor types, from individuals to venture philanthropists, trusts and foundations. Share ideas and experiences with your peers from around the world, and gain exciting new information from leaders in the profession on approaching, cultivating and maintaining successful donor relations.

This conference is for anyone working in...

- Arts and education
- Hospitals and foundations
- Charities and not-for-profit organisations

...and/or working as

- Chief Executive or Trustee
- Head of Major Donor Fundraising
- Major Donor Fundraising Manager
- Major Donor Fundraiser
- Head of Fundraising
- Fundraising Director
- Fundraising Consultant
- Financial or Wealth Advisor

Key topics include:

- Handling donor motivations and expectations
- Analysing trends in giving and donor demographics
- Comparing major donor strategies across sectors, cultures and economies
- Turning volunteers into donors and advocates for your cause
- Encouraging engagement and leadership of senior managers and board members
- Developing donor stewardship programmes for multiple donor types
- Private sector engagement in a third sector world
- Recruiting and developing outstanding major donor fundraisers

The conference is a unique opportunity to meet and learn from an international audience of fundraising practitioners, major donors, financial advisors and consultants. The Global Perspectives on Major Donor Fundraising conference is a must-attend event for anyone working to raise substantial major gifts.
Global Perspectives on Major Donor Fundraising

Sharing Successes and Failures Between Sectors, Cultures and Economies

Day One: Thursday 6 November 2008

9.00 Registration and Refreshments

9.30 Chairs’ Opening Remarks
Paulette V. Maehara, CFRE, CAE, President and Chief Executive Officer, Association of Fundraising Professionals (USA)
Lindsay Boswell, Chief Executive, Institute of Fundraising (UK)

9.40 The Impact of Culture on Major Donor Fundraising
The face of philanthropy changes between countries and cultures. In a world where distances are shrinking and investments are becoming increasingly international, it is vital to understand global markets. To help you stay ahead of the game, Mayan Quebral from Venture for Fund Raising will provide an overview of different giving cultures; hear about:

- Philanthropy across the world: similarities and differences at a glance
- Philanthropists without borders: the challenge of dealing with multi-cultural donors
- The best of both worlds: adapting ‘alien’ techniques to your market

Marianne “Mayan” G. Quebral, Executive Director, Venture for Fund Raising (Philippines)

10.20 The 21st Century Donor: Emerging Trends in Giving

- Today’s entrepreneurial philanthropist and the new physics of philanthropy
- The fundamental meaning of philanthropy as care and friendship
- A glimpse of the future: expecting the unexpected-Keynes’ prediction

Paul Schervish, Director, Center on Wealth and Philanthropy, Boston College (USA)

11.00 Refreshments and Networking Break

11.30 Major Donors’ Perspectives – Trusts and Foundations
To make sure you get a real insight into the minds of major donors, we have invited trusts and foundations, venture philanthropy organisations and private banks to tell you more about donor motivations. Hear why they give, who they give to and what they expect.

During this first session, you will have a chance to hear from the Kumudini Welfare Trust and the Chen Yet-Sen Family Foundation*. At the end of the session you will have the opportunity to engage the donors in a question and answer period.

Mahbub Al Nur, General Manager, Kumudini Welfare Trust of Bengal (Bangladesh)
James Chen, Chairman, Chen Yet-Sen Family Foundation (Hong Kong) - (invited speaker)*

12.30 Panel Session: Recruiting and Developing Successful Major Donor Fundraisers
This session will identify the key attributes of successful major donor fundraisers and how these can be adapted to any organisation and giving culture. Ellen Sullivan, Paul Schervish and Professor Klaus Siebenhaar will illustrate how to train, develop and retain excellent major donor fundraisers by:

- Identifying the key attributes of outstanding major donor fundraisers
- Ensuring fundraisers’ roles are fulfilling on personal and organisational levels
- Establishing the link between fundraising and relationship management
- Adapting high-profile customer service techniques to the fundraising market
- Daring to ‘make the ask’: sales techniques for the not-for-profit sector

Ellen Sullivan, Director of Corporate and Foundation Relations, Harvard University (USA)
Paul Schervish, Director, Center on Wealth and Philanthropy, Boston College (USA)
Professor Klaus Siebenhaar, Director of the Department of Development and Marketing, Jewish Museum Berlin (Germany)

13.20 Lunch and Networking

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www.institute-of-fundraising.org.uk/global
14.20 **Interactive Panel Session – Sharing Across Sectors**
Experts working within higher education, hospitals, charities and the arts will showcase their individual approaches to major donor fundraising. Hear from each panel member on how they approach and deal with their donors and gain an insight into different approaches to major gift fundraising. This session will be highly interactive and allow you to get actively involved.

Robin Rosenbluth, Assistant Vice President, Columbia University Medical Center, Greater New York City Area (USA)
Becky Ann Gilbert, Head, Working Group on Fundraising for the Arts and Culture, German Fundraising Association (Germany)
Beth Bottrill, Head of Major Donors and Charitable Trusts, The National Trust (UK)
Peter Dalton, CFRE, FFIA, Director of Fundraising, Austin Health (Australia)

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15.10 **Setting up a Major Donor Development Programme From Scratch**
In an inspiring case study, Timothy Burcham will showcase how he started a development programme from scratch for a system of colleges in Kentucky (USA). Timothy started by initiating a major gift fundraising effort through two state-wide campaigns which have raised more than $130 million. Hear about all the elements used to plan and execute the campaigns and find out how you too can raise major gifts by following a set of fundamental principles.

Timothy R. Burcham, CFRE, Vice President, Kentucky Community and Technical College System (KCTCS) (USA)

15.50 **Refreshments and Networking Break**

16.20 **Encouraging Donors - Private Sector Engagement in a Third Sector World**
Major donor fundraising is more complex than identifying and researching donors, ‘making the ask’ and securing the gift. Successful major donor fundraising starts with a flourishing and healthy organisational structure. Major donors are highly successful people who expect an outstanding service in all areas. They want to invest in successful organisations helping causes close to their hearts. The key is to make sure your organisation reflects all the key attributes of a thriving business which includes innovation, creativity and flexibility. This session will give you the confidence to take your organisation to the next level and instigate some key changes towards a more business-like approach to major donor fundraising.

Caroline Underwood, Director of Philanthropy and Partnerships, Save the Children (UK)

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Day Two: **Friday 7 November 2008**

**9.00** Registration and Refreshments

**9.30** **Chairs’ Opening Remarks**
Paulette V. Maehara, CFRE, CAE, President and Chief Executive Officer, Association of Fundraising Professionals (USA)
Lindsay Boswell, Chief Executive, Institute of Fundraising (UK)

**9.40** **The Impact of the Economy on Major Donor Fundraising**
Major gifts are irrevocably linked to the economy. Guy Davies and Guy Mallabone will give an overview of recent economic developments and the impact these have on current and future major gift campaigns. The aim of this session is to gain a better understanding of the link between the economy and philanthropy and predict future developments in order to prepare for, and learn to deal with, potential recessions and other economic developments.

Guy Davies, Head of Charities, Barclays Wealth (UK)
Guy Mallabone, CFRE, Vice President External Relations, SAIT Polytechnic (Canada)
### 10.20 Essentials of Major Donor Fundraising: Volunteer Leadership

‘If you want to change the world, you have to start with yourself.’ Successful major donor campaigns start at the heart of your organisation. Whether you work in higher education, a voluntary or arts organisation, making sure your volunteers and trustees embrace your values is fundamental to fundraising success. Key topics include:

- Establishing a culture of giving across the board
- Encouraging a shift in volunteer and staff mentalities
- Turning volunteers, trustees and board members into actual donors
- Successfully using volunteers as advocates for your cause

Robin Rosenbluth, Assistant Vice President, Columbia University Medical Center, Greater New York City Area (USA)

### 11.00 Refreshments and Networking Break

### 11.30 Major Donors’ Perspectives – Individual and Venture Philanthropists

The second major donors’ perspectives session will focus on a new generation of ‘hands-on philanthropists’ and ‘strategic donors’. Daniela Barone Soares and Alexander Hoare will give you an insight on what it is like to work with these donors, what motivates major donors to give and how to approach them. At the end of this session you will be able to get actively involved and ask any remaining questions you may have.

Daniela Barone Soares, Chief Executive, Impetus Trust (UK)
Alexander Hoare, Chief Executive, C. Hoare & Co. (UK)

### 12.30 Lunch and Networking

### 13.30 Adapting the American Model to the European Fundraising Market

Drawing on his experience at the largest fundraising consulting firm in the US, Robert Carter will showcase how to adapt the successful American model to the European market. An inspiring session for anyone looking for a fresh approach to major donor fundraising.

Robert E. Carter, CFRE, Vice Chairman, Archimede Philanthropy Partners (UK)

### 14.10 Managing Donor Expectations

Ellen Sullivan and Barbara de Colombe will give an insight into how they managed to deal with donors’ expectations across the years. This session will focus on:

- Creating ongoing dialogue for mutually beneficial relationships
- Understanding and responding to donors’ needs
- Using donors’ skills and networks if and when appropriate
- Defining when and how to ask for additional gifts

Ellen Sullivan, Director of Corporate and Foundation Relations, Harvard University (USA)
Barbara de Colombe, Director Major Donors, HEC Foundation, HEC School of Management (France)

### 14.50 Comfort Break

### 15.10 The Changing Face of Donor Stewardship

Successful donor stewardship programmes are key to long-term fruitful relationships and can potentially lead to major legacy donations. In a constantly changing society filled with various donor types and expectations, the subject of stewardship has become increasingly complex in nature. This session will provide practical advice and useful tips on how to deal with different donors from corporates to venture philanthropists, individuals, trusts and foundations.

Young P. Dawkins, Vice Principal for Development, University of Edinburgh (UK)

### 15.50 Closing Plenary

Timothy Burcham will take a look at the learning outcomes of the last two days and will ensure you feel inspired and motivated to embark on exciting new ventures and reshape major donor fundraising wherever you are.

Timothy R. Burcham, CFRE, Vice President, Kentucky Community and Technical College System (KCTCS) (USA)

### 16.20 Close of Conference

The programme may change due to unforeseen circumstances. The Institute of Fundraising reserves the right to alter the venue and/or speakers.

*Speaker not confirmed at date of print – the Institute reserves the right to alter the speaker.*
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CONFERENCE RATES

□ PACKAGE 1 (Full Package)
Rate includes:
• Two-day conference pass
• Wednesday welcome drinks and buffet
• Thursday evening gala dinner
Select rate:
- Institute/AFP Member Rate £465 (approx $930)
- Not-for-Profits Rate £515 (approx $1030)
- Commercial Rate £565 (approx $1130)

□ PACKAGE 2
Rate includes:
• One-day conference pass only
• Thursday evening gala dinner
Select rate:
- Institute/AFP Member Rate £325 (approx $645)
- Not-for-Profits Rate £375 (approx $745)
- Commercial Rate £425 (approx $845)

□ PACKAGE 3
Rate includes:
• One-day conference pass only
No social activities included
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- Institute/AFP Member Rate £285 (approx $565)
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- Commercial Rate £385 (approx $765)

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CANCELLATIONS / SUBSTITUTIONS
Cancellations made before Tuesday 2 September 2008 will be charged at 10% of the delegate fee. Cancellations made between this date and Tuesday 30 September 2008 will be charged at 50% of the delegate fee. No refunds will be made for cancellations after this date. However, you can send a substitute delegate at any time. Cancellations and substitutions must be made in writing.

BOOKING CONDITIONS
Your place will be fully confirmed on receipt of payment. Payment must be received before the conference date.

SPECIAL ARRANGEMENTS
If you have any special requirements such as wheelchair access, please let us know in advance by contacting Edwin Saayeng on +44 (0)207 840 1033.

PLEASE NOTE
The conference fee covers entrance to all sessions, conference documentation and electronic presentations, coffee/refreshment breaks and lunch.