
An Introduction to

CASE@Campus

CUSTOMIZED TRAININGS & COACHING TO MEET YOUR CAMPUS' NEEDS

Why choose CASE?

As the global association providing education and training services to advancement professionals at 3,100 institutions worldwide, CASE is uniquely qualified to lead Advancement training. Our knowledge of the principles and techniques of successful fundraising, marketing and communications, alumni relations, and the infrastructure for successful Advancement operations comes from our deep understanding of the complexities that those operations face—particularly in universities.

CASE's decades of service to the advancement profession uniquely prepare us to provide training.

- For almost 50 years, CASE has provided best practice training to those involved in university advancement and development.
- This long-term experience results in workshops that provide participants with a deep understanding of successful development practices that prepare participants to implement new action plans once the course is complete.
- All our trainers are former or current practitioners experienced in applying research and best practices within day-to-day dean's and development offices.
- CASE has created the competencies for the advancement profession.



- Our trainings are structured around the competencies above creating a structure for academic leaders and development professionals that establishes a standard of practice in U.S. higher education.

Courses

All Case@Campus workshops are customized to meet your institution's needs.

Courses are highly interactive and provide attendees with the opportunity to develop action plans to implement at the end of the training. Trainings are available in either in-person or virtual formats depending on the preference of the institution. Post-conference and research coaching is available virtually.

Academic Development

Best Practices for a Small Shop

In this workshop, we will explore the philanthropic landscape, best practices for small shops regarding prospect management and the “back of the house” operations, as well as best practices for cultivating, soliciting, and stewarding donors.

Building a Donor Pipeline and Managing Your Portfolio

How do we find the most meaningful approach to organizing an Academic Leaders’ external work? We’ll discuss scenarios for relationship building activity at all levels and how this activity affects the organization of time and calendars. We’ll also explore strategies, tactics and assessment tools that can help advancement officers and academic leader partners achieve positive outcomes for their institutions.

The Donor Cycle

An interactive session on fundamentals of each step of the development cycle. Attendees will discuss fundraising concepts, shared terms, types of gifts, and what motivates donors.

Ethics in Advancement

Ethical issues are more top of mind than ever in development. Transparency, accountability, and the highest ethical standards of personal and institutional conduct are vital to our success. In this session, we'll review ethical issues related to our work in development and consider the tools and approaches we use to ensure we all remain on the highest ethical ground. *(Workshop Available)*

From Donors' Perspective: Donor Panel

Enjoy this rare opportunity to hear directly from remarkable philanthropists about their motivation and commitment to supporting higher education. This conversation will explore their experiences as donors and their philosophies that guide their philanthropy. It will also offer insights into how they engage with institutions and what contributes to their decision to give. The discussion will also explore what our panelists expect from the institutions they support. *(University is responsible for recruiting these panelists)*

Fundamentals of a Campaign

An overview of the fundamentals needed to conduct a successful campaign. This session will share the current trends in campaign strategy, trends in the field of advancement, and campaign planning best practices that support your institution's overall campaign success.

Fundraising Scenarios & Small Group Role Playing Workshop

In a series of role plays, the group will consider not only the sort of preparation required to ensure a donor meeting is fruitful and enjoyable, but also what a conversation during an actual visit might sound like and what a campus leader may expect when meeting with donors.

Major & Transformational Gifts

No matter how your organization classifies major gifts, these large commitments are the fuel that often drives annual production of private support. This session will explore definitions of major gifts, how they fit into a comprehensive development effort, and what motivates donors to make them. We'll look at how your institution might define, identify and develop high net worth donors and partner with them to realize shared ambitions and transformational impact. We will look at major gifts in the context of societal, economic, and philanthropic trends across the nonprofit educational sector.

Making the Ask

We often think of a solicitation as a singular event, a meeting where we "ask for the gift." In actuality, this is more than just a transactional visit and, when done right it, should ensure success at every stage of the solicitation process. Much preparation goes into setting up the ask including information gathering, donor cultivation, Strategic and generative conversations, and questioning and listening. Understand the solicitation process and learn how to develop language to inform your gift strategy, advance relationships, and result in a generous "Yes" to your request.

Role of the Dean/Academic Leader in Successful Development

Academic leaders have a special role in successful development, including designing the case for support, deepening the engagement of top potential givers, and participating in all phases of the Development Cycle. This session helps academic leaders understand their critical role in setting a vision and making time for leadership in the development process.

Stewardship and Recognition

All gifts must be recognized and any opportunity for recognition is also an opportunity for stewardship. In this session, we assess where your institution is at with your stewardship program, discuss best-in-practice policies for stewarding your donors, and new ways to steward your donors towards that next big gift.

Boards

Role of the Board

Fundraising success is a team effort, from the board leadership to the front-line staff. This session reviews the donor cycle, the board's role in fundraising and how board members can harness their networks to support the institution.

The Joy of Giving

In this session, participants will learn about the crucial role of the board in creating a culture of philanthropy. Our experts will guide you through the development cycle, giving you a comprehensive understanding of how to work with institutions at every stage of fundraising. Additionally, we will delve into the motivations that drive people to give, empowering you to better frame donor interactions.

Leveraging Your Network Workshop

Who do you know? Who would want to support your institution? This session strategizes how Board members can harness their networks to support the institution.

Community Colleges

Place Based Philanthropy (Community Colleges)

Community Colleges fulfill their anchor institution role by fostering access to postsecondary education, supporting local economies, addressing critical workforce shortages, and contributing to public health infrastructure. In this session, you will learn about how to use your Community College's knowledge and expertise of your local community to incorporate into your fundraising strategies to help achieve lasting and transformative change, both for the school, and surrounding area. (Workshop Available)

Alumni Engagement: Community Colleges

In the competitive fundraising environment of today, Foundation and Alumni Service teams need to effectively engage and communicate with stakeholders. This session will focus on best practices regarding fundraising, engagement and alumni relations specifically designed for community colleges. This session will focus on how community college Foundation and Alumni Service teams can leverage storytelling, awards, and institutional affection to create unique opportunities for connecting with donors, alumni, employees and community partners.

Communications

Art of Active Listening

As an advancement professional, you are a detective or anthropologist, uncovering clues to your donor's philanthropic interests, motivations and values. And, like a good detective or anthropologist, you have many different tools for gaining the information you need. In this session we will identify some of the critical skills needed to be a strategic listener and observer as well as an active participant in relationship building.

Navigating Difficult Conversations

Advancement professionals are navigating an increasingly complex societal landscape; along with being tasked to engage in nuanced conversations with stakeholders who hold a multitude of perspectives. This session is designed to advance active listening and constructive dialogues skills with team members and stakeholders who hold varying views.

Planning for Crisis Communications

This session provides strategies and best practices for crisis communications – including how to prepare for communicating with the public during a crisis, as well as implementing a crisis communications plan.

Storytelling

Philanthropic investment asks the donor to venture into the future, to respond to a compelling mission or vision. The case for support provides the foundation for fundraising, philanthropic communication, and outreach strategies—all driven by stories of real impact. This session will discuss how to translate an institutional case for support and engage the prospect through powerful storytelling that inspires engagement and action. (Workshop Available)

Strategic Communications

What are Strategic Communications and how can it support a higher education institution? The session familiarizes participants with basic communications terminology and processes so that universities are ready to implement their strategic communication – both for planned and unplanned events.

Data

Data & Measurement 101

In the era of information abundance, organizations are increasingly recognizing the transformative potential of harnessing data for decision-making. This session, is designed to illuminate the critical role data plays in shaping strategies, mitigating risks, and driving innovation. It also details the most common data points measured by the best-in-practice advancement teams.

CASE Global Reporting Standards

CASE has developed the common set of standards, guidelines, and definitions for reporting the results of educational philanthropy activities at schools, colleges, and universities across the globe. This training familiarizes participants with worldwide standards in institutional fundraising,

with new definitions for educational philanthropy and important guidance around gift counting, funds received, new funds committed, and donor control and influence.

CASE Insights on Alumni Engagement

The adoption of a global framework for measuring engagement has fundamentally changed the role of alumni relations professionals and in response, how fundraisers, clinicians, academic leaders, and other university partners incorporate alumni engagement metrics to meet fundraising and other institutional outcomes—_In this session we will explore the framework, key metrics, and how institutions are using engagement to shape strategy, set targets, and meet goals.

Leadership/Management

Building Organizational Culture

Organizational culture has a direct impact on results. While many organizations have designed strategic plans, organizational priorities, performance goals, and the like, have you considered the impact your culture has on those important initiatives? This workshop aims to demonstrate how one organization has been intentional about culture, mission, and values so as to impact the results of their fundraising. Come and learn how to keep your organization both intelligent (smart) and values-based (healthy)!

Cultural Competencies

Universities and Schools are increasingly thinking globally when it comes to strategy, student recruitment and partnerships, but many are uncertain about how to grow or expand global giving. When working with international donors, success will require navigating through the different cultural realities of how people think and get things done in the global context. Unless we know how to decode other cultures and avoid easy-to-fall-into cultural traps, we can miscommunicate with our donors and potentially miss opportunities. This session will give you concrete information on how culture impacts global interactions, and key strategies to overcome differences to reach your advancement goals.

Culture of Philanthropy

This opening session will focus on understanding what a culture of philanthropy is, how to foster this at your campus, and level setting terminology. Most importantly, it stresses the role academic leaders play in setting the vision for philanthropic opportunities to advance the institution, and how those align with the priorities and initiatives of the president. (*customized to region of world*)

DEIB Training in Advancement

In the dynamic landscape of Advancement Services, fostering Diversity, Equity, Inclusion, and Belonging (DEIB) is vital for success. This specialized training is designed for professionals specializing in advancement services. It equips participants with the skills to navigate complex processes that impact diverse communities and stakeholders. Through disciplined scenario practice, communication strategy development, and understanding societal and demographic changes, this training empowers advancement services professionals to contribute to DEIB goals and foster inclusivity within their roles.

Strategic Leadership

Leading a successful advancement team in the 21st century requires a unique set of skills. With an emphasis on research, data, experience, and vision, academic leaders must be well-versed in governance, accountability, collaboration, compliance, and leadership. This session will help you establish the strategic direction of your unit/institution, and inspire your staff and volunteers to follow suit.

Time Management

Your fundraising duties take time, and how you utilize that time will determine your overall success. So, how should you prioritize your time to meet your development needs? In this session, we will highlight the most important tasks you will do as a dean to meet your fundraising goals. Then, we will outline which ones you should try to do daily, weekly and monthly to reach your goals.

Threats to Philanthropy

Today's colleges and universities face an unprecedented array of challenges and threats: the enrollment cliff; political inference; declining public trust and value perception. It's easy to list the many challenges facing higher education, but what role do we as advancement professionals play in overcoming them? In this session, we will discuss the challenges, their associated impacts, and share examples of how advancement teams have leveraged their alumni, donors, communication platforms, and philanthropic resources to help their institutions meet today's challenges head-on.

Specialty Development

Grateful Patient Fundraising (Medical Schools)

A culture of philanthropy that centers the patient-donor is crucial in building a fundraising program that significantly enhances engagement with your healthcare organization. This session illustrates the collective impact that is possible when patients have the opportunity to express their gratitude and support the staff members and departments that played meaningful roles in their own care. Medical staff will learn how to identify grateful patients and optimize the development team's ability to request and secure major, principal, and planned gifts.

Athletics Development

The need for philanthropic support in higher education has never been greater. How do we ensure that the cause for giving to Athletics remains at the forefront of donors' minds? This session will discuss how Fundraisers can create a compelling case for giving, while building a structure that can best support the goals of the institution.

Developing an Athletics Campaign

Raising money for multiple projects at the same time is a necessary part of our business. This session will share strategies for how to communicate departmental priorities with donors and how building these relationships can often be the difference between surpassing your goal and falling short.