## **IDPE 2019 Annual Conference Programme**



Streams: ALL - Appropriate for everyone

**ALU - Alumni relations** sponsored by Graduway

**Graduway**<sup>⋄</sup>

**EXT - External relations** 

**FDR - Fundraising** sponsored by More Partnership

More

**PES - Personal effectiveness** 

**PSC - Product showcase** 

**SLP - Strategy and leadership** sponsored by Graham-Pelton



HOW TO - sessions provide step-by-step practical information on a range of topics for anyone new to development or looking for more detailed guidance on a particular aspect of fundraising or alumni relations

	Monday 10 June 2019	
09:30-10:30	Registration	
09:30-10:30	Morning coffee with sponsors and exhibitors	
09:30-10:30	Networking for first-time delegates	sponsored by Graham-Pelton
10:30-11:30	Opening and keynote address	sponsored by Rux Burton Associates
ALL	Altitude and attitude: achieving the unachievable What do you do when you're faced with a challenge that scares an first Welsh woman to climb Mount Everest. Tori joins us to describ mountain. How it takes more than speed, fitness and stamina to s and the strategies, mindsets and beliefs that contributed to her su comfort zone and aim high to achieve the unachievable, and how impact!  Tori James, Speaker and Adventurer Chair: Karen Hartshorn, Director of Development, Pangbourne Co.	be her inspirational journey both onand offthe survive and thrive on the world's highest mountain, access. Discover why you need to move outside your you can scale your next mountain and make an
11:40-12:40	Session 1	
ALU	Widening and deepening engagement: the career support opport A chance to consider the power of careers support and business not transformational gift of time has been demonstrated to reap reward ability to create powerful connections and insights linked back to you Career Partnership Programme established six years ago, and from volunteering to support student careers activities, demonstrably in alumni engagement and satisfaction, creating an institutional win-Karen Jones, Development Manager, Fettes College; Emma McFad University of Exeter Chair: Caroline Monaghan, Radleian Society Manager, Radley College	etworking as a proposition for your community. The ards at all levels of the career journey, with the unique your institution. Hear about the award-winning Fettes in the University of Exeter, on how alumni improves both student employability and deepens win.  Iyen, Head of Alumni Relations and Volunteering,

	The other half of bursary fundraising: getting pupils through the door	
EXT	Recruiting strong bursary candidates can be even harder than raising funds to support them. Do schools' programmes for partnership and community relations make fee assistance programmes even stronger, and does this help attract	
	donors?  Emily Clarke, Campaign Director, Highgate School	
	Chair: Simon Jones, Director of Development, The Manchester Grammar School	
	HOW TO: Raise more money with two little words: 'Thank you'	
	Thanking donors is a necessary action in fundraising; you will retain more donors and raise more money. But what does a good thank you look like, and when will it have the biggest impact? This session will explore effective thanking	
FDR	processes you can easily replicate.  Nikki Bell, Fundraising Consultant, KEDA Consulting; Murray Lindo, Head of the Wellington Community, Wellington	
	College Chair: Ed Lang, Managing Director, Buffalo Fundraising Consultants	
	No time like the present	
	It's ironic that 'advancement' is so often mired by delay, planning permission, prioritising the project, picking through political predicaments. It's enough Ps to pee you off! Whether your capital campaign is not ready, or it's only just	
FDR	finished and you are not sure what next - how do you build the culture of giving and maintain momentum for fundraising when everyone around thinks you simply aren't ready to fundraise? Join us to look at different ways to	
	ensure your fundraising never sleeps.  Camilla Mair, Development Manager, Woldingham School; Thomas Northcote, Development Director, The Leys; Katie	
	Shama, Partner, Rux Burton Associates Chair: Karen Hartshorn, Director of Development, Pangbourne College	
	Taking your school's pulse: alumni, donor and parent research reimagined	
	Our unique approach to stakeholder research will inform, surprise, excite and take your school development to the next level. Offering scalable services to mine, interpret and optimise the wealth of information in your constituent	
PSC	base, we can help to map your fundraising moves, widen your network and enhance your school's brand.	
	Rachel Petrie, Senior Advisor, RSAcademics Places are limited, please visit registration to reserve a place	
	Co-production: working together to achieve your school's vision	
	Does your Head 'get it'? Cultivating and stewarding senior leaders should be a priority for all development	
SLP	professionals, but how does this work in practice? This honest, informal session explores how Bolton School's Headmaster and Head of Development work together practically to achieve the school's fundraising vision, and the	
SLF	challenges and tensions they have faced along the way.	
	Philip Britton, Headmaster; Laura Firth, Head of Development, Bolton School	
	Chair: Jesse Elzinga, Headmaster, Reading Blue Coat School	
12:40-13:40	Lunch with sponsors and exhibitors	
12:40-13:40	Networking for first-time delegates sponsored by Graham-Pelton	
13:00-13:40	Lunchtime workshops and clinics	
	'It's good to talk': communication skills for the development professional  As fundraisers, we rely on the phone to make prospect meetings, secure volunteers, sound out our Board and chase down gifts. Getting calls right is make or break to achieving our goals. This workshop, relevant to every member of the development office team, will equip you, through discussion and role-play, to make fantastic, effective and focused calls that put you in the driving seat.	
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	Fundraising clinic An opportunity to get your questions answered by some of our most experienced development directors. By	
13:45-14:30	appointment only, please visit the registration desk for more information.  Afternoon plenary	
ALL	20 years of IDPE: the impact of development on schools Our expert panel will explore the history and the emerging trends of school development across the wider fundraising sector. We'll discuss the impact of our work and how the learning from the past 20 years can inform and shape our future success.  Luke Deering, VP Business Development, Graduway; Andrew Harris, Executive Director of Campaigns, Aston University; Dan Keyworth, Director of Customer Success, International Markets Group, Blackbaud Chair: Becki Mckinlay, Managing Consultant, Graham-Pelton	
14:40-15:40	Session 2	
ALU	Alumni engagement, from the small detail to the big picture: using data to justify investment and demonstrate strategic impact  How can we use data to demonstrate impact and show success within our communities? Join us to explore how data can inform your alumni engagement programme and manage expectations of your senior leadership team.  Erin Charles, Senior Development Officer, The Perse School; Lindsey Davis, Development Director, Bradford Grammar School  Chair: Chris Aucken, Director, InTouch Software	
EXT	HOW TO: Help (me) deliver #SocialMedia success  Your alumni are connected 24/7 and this opens up new channels every day in which to consume content. Is your school sharing the right content, at the right time, through the right channel? Do you know what content your alumni want to consume? Join Simon Noakes aka 'The #DigitalJedi' to explore what social media platforms to use, how to measure success, and how you can deliver #SchoolStories that will actually drive alumni engagement!  Simon Noakes, Founder and CEO, Interactive Schools  Chair: Kirsty Hassan, Director of External Communications, Colston's School	
EXT/SLP	Measuring impact right from the outset of a campaign In a climate where independent schools are increasingly expected to do their bit, more and more donors are demanding evidence of public benefit. How do we approach a project — in developing both the strategy and the case for support — to embed public benefit right from the outset of a campaign, and maximise the potential for donations? Tom Arbuthnott, Director of Outreach and Partnership, Eton College; Sarah Butterworth, Assistant Head, Community Partnerships Director, Highgate School; David Goodhew, Head, Latymer Upper School; Sally-Anne Huang, Headmistress, James Allen's Girls' School and Vice-Chair, HMC Chair: Julie Robinson, Chief Executive Officer, Independent Schools Council	
FDR	The power of prospect research: bringing a game-changer to your fundraising  Many development teams have little or no resource for prospect research, yet choosing to dedicate resource to this area of fundraising can create a real step change in your fundraising success by enabling you to make better strategic decisions and upscale your fundraising efforts. So what are the key tools and processes you can build around prospect research in order to achieve this? Join Jo and Simone as they explore how to improve your fundraising by developing and embedding first class prospect research within your overall strategy.  Joanna Carr, Head of Prospect Research, King's College London and King's Health Partners; Simone Kraemer, Senior Prospect Management and Research Officer, University of Kent  Chair: Kerry Wilson, Director of Development, Rugby School	

PSC	Investing in a CRM: aligning tech to your school's development strateg The most successful development operations are those which align their overall strategy for fundraising, alumni relations and wider community of Account Executive for Schools, will demonstrate within Blackbaud's Cloumission by working more efficiently to increase funds, grow engagement Dave Bunting, Account Executive, School Solutions, Blackbaud Places are limited, please visit registration to reserve a place	r use of technology and data to the school's engagement. Blackbaud's Dave Bunting, ud Solution how your team can advance its
SLP	Benchmarking: early findings and how to use them to advance your work The benchmarking survey continues to be one of the largest in global education fundraising. We will share some of the key early findings from the latest survey, highlight best practice, discuss challenges and, importantly, use our expert analysis to provide some early takeaways to move all types of development programmes forward.  Andy Wood, Managing Director, Graham-Pelton Chair: Matthew Dear, Director of Development, The Oundle Society	
15:40-16:20	Afternoon tea with sponsors and exhibitors	
16:25-17:10	Session 3	
FDR	Making the most of the middle  Many schools have established regular giving programmes and spend til donors, but less attention is given to developing "middle" value donors. donors offers, hear how to overcome some of the challenges of bridging learn some practical approaches for developing more mid-level giving at Rosie Dale, Partner, More Partnership Chair: Louise Bennett, Deputy CEO, IDPE	Join us to explore the potential this group of g the gap between regular and major giving, and
FDR	Fundraising campaign of the year award winners 2018  Hailed as the best in England by top cricketing professionals, the Jarratt philanthropic enterprise, whereby all profits fund the Reed's Foundation how Reed's School exceeded their initial target of £775,000 and involved fundraising campaign.  Kathryn Bartram, Development and Marketing Director, Reed's School on Chair: Philippa Dunford-Jeffs, Development and Alumni Manager, St Pet	n, supporting disadvantaged pupils. Find out d the whole community in their award-winning and Reed's Foundation
FDR/SLP	What next? Moving beyond a campaign  Does a capital campaign ever actually finish and what strategy is required to maintain donors' interest? Doug Collins will describe how fundraising and development is like a game of golf – a long and almost perpetual game!  Douglas Collins, Chief Executive, Harrow Development Trust  Chair: Colin Dudgeon, Development Director, Stowe School	
PES	Emotional intelligence: the key to success and well-being Today we face one of the most challenging operating environments in schools for decades - expectations and workloads are seemingly endless! How can we meet the ever-growing challenges facing us and still feel our best? This participative session will help you to develop your self-awareness and gain insight into being and feeling your best. You will leave this session with renewed intention and increased clarity and focus.  Jo Beckett, CEO, IDPE	
17:20-17:40	IDPE 2019 Annual General Meeting	
17:40 - 19:15	Free time	
10.15 10.45	IDDE 2010 Development Assemble Delete Development	
19:15 - 19:45	IDPE 2019 Development Awards Drinks Reception	sponsored by Blackbaud

	Tuesday 11 June 2019	
08:30-09:30	Registration	
08:30-09:30	0-09:30 Morning coffee with sponsors and exhibitors	
09:30-10:15	0:15 Session 1	
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PES	The art of development directorship  What are schools looking for in an outstanding development director? Learning from some of the sector's most successful development directors, we explore what skills and characteristics an aspiring development professional needs to become a 'top development director'.  Debra Price, Head of Philanthropy, RSAcademics  Chair: Louise Bennett, Deputy CEO, IDPE	
PES	Be a resilient leader: three ways to thrive at work and maximise your leadership potential  Are you working in a demanding fundraising leadership role? Working hard but not having the impact you know you're capable of? Feeling overwhelmed at times with juggling today's tasks and tomorrow's ambitions? Are challenges leaving you drained, rather than helping you to grow? If you experience one (or all!) of these common symptoms of being a busy fundraising leader, you are not alone. And it need not be this way. Gain the tools to help build your resilience and put meaning and fun back into your everyday.  Charly White, Executive Coach and Trainer, Vivid Leadership Ltd.  Chair: Melanie Bushell, Development Director, The Portsmouth Grammar School	
PES	Perfectionism: how to silence your inner critic  Are you your biggest critic? To what extent do you feel held back by what others might think, both professionally and personally? Perfectionism is one of the greatest barriers to our effectiveness and personal growth. How many times have you spent 20 minutes drafting an email that should have taken two? Or committed your time to something because you feel you should rather than you want to? Join us to explore 'perfectionism', and to find out how you can prepare for and counter your inner critic.  Gareth Davies, Director, The Bravest Path  Chair: Kate Chernyshov, Director of Development, The King's School, Canterbury	
10:25-11:05	Morning plenary	
ALL	Genuine impact through integrated bursary fundraising  A stellar panel will share their insights and experiences of delivering major bursary fundraising programmes, the benefits they bring to schools and the joined-up approach required to deliver something truly transformational.  Dr Martin Boulton, High Master, The Manchester Grammar School; John Claughton, Senior Counsel, Graham-Pelton; Ian Davenport, CEO, Royal SpringBoard  Chair: Elisabeth Anderson, Director of Development, Bryanston School	
ALL (state schools)	Creating sustainable income streams: is regular giving possible in the state sector?  A regular giving programme that provides sustainable and scalable funding, is every state school's dream. However, this dream can require you to overcome a number of challenges first: your parents' perception they are 'paying' for education; your senior leadership's commitment to a programme that will take time to establish. Join us to hear how state schools have surmounted these hurdles (and more) to develop successful regular giving programmes.  Stephen Locke, Bursar, Pate's Grammar School; Jackie McRoberts, Development Officer, The London Oratory School Chair: Clare Atkinson, Development Director, Dr Challoner's Grammar School	

11:05-11:40	Mid-morning coffee with sponsors and exhibitors	
11:45-12:45	Session 2	
ALU	Strategic planning: creating an active and engaged alumni community  Starting up a new alumni engagement programme with insights gained from the university sector, and the successes, failures and outcomes of an established school alumni community. Join us to explore how to develop your alumni relations programme.  Kathrin Ostermann, Director of Development and Alumni Relations, City of London School; Selina Joslin, Alumni Relations Manager; Richard Salmon, Head of Development and Alumni Relations, Felsted School  Chair: Anna Semler, Old Stoic Society Director, Stowe School	
EXT	Demonstrating value and impact Using 'The Effect of Giving', the University of London's donor report as an exemplar, join Bill and Holly to discuss how you can demonstrate the impact of philanthropic activity to different audiences – be it externally to alumni and parents, or internally, to the senior management team and board of governors. Bill will share how the University of London has developed their case for support for both scholarship asks and a capital project, their main 'wins', and how they maintain momentum. Holly will talk through current best practice on measuring non-financial metrics as well as how to integrate engagement activities with the overall work of the development office.  Bill Abraham, Director of Development; Holly Peterson, Head of Constituency Engagement, University of London Chair: Phillip Rothwell, Director of Development, Warwick Independent Schools Foundation	
FDR	Social fundraising for schools: using digital networks to raise more  If you think peer-to-peer fundraising is just for charities and crowdfunding is just for students, think again. Online fundraising, when done in the right way, can do wonders for a school's reach and fundraising potential. Today's supporters respond best to multi-channel approaches, so using social fundraising as a supplement to your other fundraising initiatives and having a solid strategy to guide your school is important. In this session we will hear how Dulwich College launched their first major crowdfunding campaign, along with tips from Blackbaud on how to get your social giving strategy started.  Kathi Palitz, Database and Operations Manager, Dulwich College; Charlie Vass, Digital Services, Blackbaud Chair: Sam Corfield, Development Director, Lord Wandsworth College	
FDR	HOW TO: Write your first fundraising strategy  Been asked to write a strategy? Not sure where to start or what to include? A practical session which will leave you with a clear idea of what you need to cover and how to monitor and evaluate as you go along.  Christiane Dickens, Development Director, Cheltenham College; Cat Gransden, Director of Development, The Blue Coat School  Chair: Rowena Gaston, Development Director, Canford School	
PSC	Our shared vision  Fundraising decisions have often been made simply on received wisdom or just giving it a try. Two decades of results, deep analysis and AI now offer an evidence-based approach that can maximise engagement and match achievement to capacity. This session will show you how to target your activities to transform your results across your entire solicitation mix.  John Rux-Burton, Founder and Managing Partner, Rux Burton Associates  Places are limited, please visit registration to reserve a place	
SLP	The American way of fundraising: nope I don't think so  We always hear that the best way to fundraise is the 'American way', but is it really? What happens when American models of fundraising are dropped on UK institutions? Is the 'American way' appropriate for British audiences? We will tackle all of these questions and more as we explore what we can really learn from the American fundraising models and how to implement fundraising best practices within our institutions.  Nic Katona, Director of Philanthropy, University of Leicester  Chair: Stephanie MacMillan, Director of Development, Alleyn's School	
12:45-13:45	Lunch with sponsors and exhibitors	
12:55-13:35	Lunchtime workshops and clinics	

PES	Resilience: learning to rise  When we are brave and bold enough often enough, inevitably we will sometimes fail. In these situations, the stories we tell ourselves about our personal and professional struggles can keep us stuck in a cycle of fear, self-doubt and regret. We will look at how to overcome mistakes, face disappointment and re-write your future in a way that increases both your resilience and effectiveness.  Gareth Davies, Director, The Bravest Path
FDR	Top tips for trust and grant applications  This informal session will consider the do's and don'ts of completing grant applications and what to include to maximise your school's potential to be successful.  Sharon Noble, Development Manager, Chestnut Grove Academy
	Fundraising clinic  An opportunity to get your questions answered by some of our most experienced development directors. By appointment only, please visit the registration desk for more information.
13:50-14:50	Session 3
ALU	International alumni strategy: small team, high impact Learn how a solo alumni manager at the acclaimed Institute of Development Studies has successfully orchestrated a large programme of alumni activities, built a diverse international careers network and nurtured content contributors for the institute's website and newsletters.  Michelle Cruickshank, Alumni Relations Officer, Institute of Development Studies Chair: Kate Jillings, Co-Founder, ToucanTech
ALU/FDR	A one night stand or a marriage: when is the right time to make the ask?  Taking the leap from engagement to fundraising can seem a daunting prospect, yet are they not one and the same thing? Successful fundraising depends upon good engagement, on building committed relationships with your school community. This session explores how to build successful relationships, and when is the right time to cross the threshold to make the ask.  Pippa Blackstone, Director of Development and Alumni Relations, Tonbridge Grammar School; Simon Jones, Director of Development, The Manchester Grammar School  Chair: Jan Perrins, Development Director, Marlborough College
EXT	Engaging with your senior leadership: integrating external relations and development  The Abbey, Reading began a three year journey of integrating the marketing, admissions, alumnae, events and development departments under a single external relations umbrella in 2016. Working with Socius over the past year, they explain how the process has transformed team culture and refocussed budgets and staff output on achieving the school's strategic business goals.  Craig Andrew, Head of External Relations; Julie Cornell, Governor; Rachel Dent, The Head, The Abbey School, Reading; Jane Pendry, Senior Coach, Socius  Chair: David Jenkins, Director, Socius
FDR	HOW TO: Deliver a major capital campaign  Drawing on the experience of Wimbledon High School's ongoing £3 million campaign, we will offer a step-by-step guide to planning and managing a major fundraising initiative. From the initial feasibility stages through to completion, we will explore building volunteer support, engaging the broadest possible community, securing leadership gifts, and developing a dynamic but well-structured campaign strategy to achieve your target.  Chris Goldie CFRE, Director, Gifted Philanthropy; Joanne Joyce, Director of Development and Alumnae Relations, Wimbledon High School  Chair: Scott Sheridan, Director of Development and Engagement, Brighton College
FDR/SLP	Beyond fundraising: franchising and other international partnerships  If our goal is to create sustainable income streams for our schools, what role do international school partnerships play and is franchising your school brand overseas a viable option? We will explore sister school relationships, teacher and student exchange programmes and most importantly, where do you start on the road to franchising. What are the risks and the benefits? Alongside Nick Pettingale, Karen Li, CEO of Driving Force, a major Chinese investment company, will be speaking from the perspective of an investor, outlining what they look for in a British boarding school.  Karen Li, Chief Executive, Driving Force; Nick Pettingale, Director of External Relations, Ellesmere College  Chair: Sean Davey, Head of Foundation and International Business Development, Reigate Grammar School

Marketing to your alumni: which channels generate the best results  What does a successful and well-rounded marketing plan look like and how do you work out which types of communication work best for different demographics? This session will share tips and advice on all aspects of marketing to your community.  Fran Reid, Development and Alumni Manager, Mount Kelly School; Ann Saffery, Development and Alumni Manager, Aldenham Foundation  Chair: Peter Jakobek, Assistant Head, Alumni and Events, Bristol Grammar School and Chairman, AROPS  Creating partnerships with parents  Parents, both current and former, are key stakeholders within the school community, but what motivates them to volunteer? To fundraise? To donate? St Benedict's School and Chestnut Grove Academy will share how they are working with parents and parent groups to engage with and grow support from their parent community.  Tara George, Development Director, St Benedict's School; Sharon Noble, Development Manager, Chestnut Grove Academy  Chair: Kerry-Jane Packman, Development and Membership Director, Parentkind  HOW TO: Make your creative consultancy work for you  It's important to have a close, honest and working relationship with your consultant — don't just send off a brief and wait for a formulaic plan or a pretty brochure design to come back. You should use their experience and expertise to get under the skin of who you are, what you want to achieve and how you are going to do it. Working in this way can have a massive impact on your creativity, and ultimately, your success.  Eleanor Merick, Director, Alumni, Development and Careers, Roehampton University; Geoff Nicol, Founder and Creative Director, Onthree Design Limited; Nick Smith, Director, AirBounce  Chair: Hannah Hamilton, Director of Development and External Relations, Stamford Endowed Schools  How much will it cost to get my child into your school? Ethics in educational fundraising: is it as cut and dried as it seems?  Ethical questions arise in fundraising all the time but is it ever ri	PSC	How can an alumni and development database measure engagement successfully?  This showcase will help you appreciate the many factors that contribute to an engaged alumni and how these can help achieve your strategic goals. You will also learn about how a modern alumni and development CRM should track these key data points and enable you to report on them.  Joel Trotman, Senior Business Consultant, The Access Group  Places are limited, please visit registration to reserve a place	
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It's important to have a close, honest and working relationship with your consultant – don't just send off a brief and wait for a formulaic plan or a pretty brochure design to come back. You should use their experience and expertise to get under the skin of who you are, what you want to achieve and how you are going to do it. Working in this way can have a massive impact on your creativity, and ultimately, your success.  Eleanor Merrick, Director, Alumni, Development and Careers, Roehampton University; Geoff Nicol, Founder and Creative Director, Onthree Design Limited; Nick Smith, Director, AirBounce Chair: Hannah Hamilton, Director of Development and External Relations, Stamford Endowed Schools  How much will it cost to get my child into your school?¹ Ethics in educational fundraising: is it as cut and dried as it seems? Ethical questions arise in fundraising all the time but is it ever right to, 'just take the money'? Join Ian MacQuillin to explore some of the ethical dilemmas facing fundraisers in schools, the important role of beneficiaries in the ethical decision-making process and how to achieve a balance between the rights of your donors and the rights of your pupils. Ian MacQuillin, Director, Rogare - The Fundraising Think Tank Chair: Marc Whitmore, Partner, More Partnership  Effective trustee leadership: what board members, development professionals and heads must know Without the strategic involvement of your school's Board of Trustees, it can be difficult to meet your fundraising objectives. But what should that involvement look like? What happens when the appropriate investment does not take place – or, conversely, when governing bodies become too involved in development? Using the IDPE and Graham-Pelton benchmarking findings, this session will explore the areas where strategic investment is necessary, along with the ways to consider and evaluate the oft-discussed ROI. Charles Platt, Senior Counsel, Graham-Pelton; Mark Taylor, Chair, AGBIS and Bursar, The King's School, Canterbury; Elizabeth Zeigler	ALU/FDR	Parents, both current and former, are key stakeholders within the school community, but what motivates them to volunteer? To fundraise? To donate? St Benedict's School and Chestnut Grove Academy will share how they are working with parents and parent groups to engage with and grow support from their parent community.  Tara George, Development Director, St Benedict's School; Sharon Noble, Development Manager, Chestnut Grove Academy	
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16:00 Conference Close	SLP	Without the strategic involvement of your school's Board of Trustees, it can be difficult to meet your fundraising objectives. But what should that involvement look like? What happens when the appropriate investment does not take place — or, conversely, when governing bodies become too involved in development? Using the IDPE and Graham-Pelton benchmarking findings, this session will explore the areas where strategic investment is necessary, along with the ways to consider and evaluate the oft-discussed ROI.  Charles Platt, Senior Counsel, Graham-Pelton; Mark Taylor, Chair, AGBIS and Bursar, The King's School, Canterbury; Elizabeth Zeigler, President and CEO, Graham-Pelton	
	16:00	Conference Close	