



# IUPUI THE FUND RAISING SCHOOL

## LILLY FAMILY SCHOOL OF PHILANTHROPY

### Developing Annual Sustainability

#### COURSE AGENDA

##### DAY ONE

- 8:30**                    **Introductions**
- 9:00**                    **Course Overview**
- 9:15**                    **Fundraising Fundamentals**  
Value and the Fundraising Environment  
Fund Raising School Fundamentals
- 10:15**                    *Break*
- 10:30**                    **The Annual Fund**  
Definition and Role  
    Policies  
    Readiness  
    Board and Staff Responsibilities  
    Volunteerism  
Case for Support
- 12:00**                    *Lunch*
- 1:15**                    **The Annual Fund, cont.**  
Constituents  
    Contributions (Giving USA)  
    Constituency Circle  
    High Net Worth Study  
Tenants  
General Trends  
Success Stories
- 2:45**                    *Break*
- 3:00**                    **Data Driven Decisions**  
Historical Data Analysis  
    Development Inventory  
    Donor Analysis  
    Return on Investment
- 5:00**                    *Adjourn*



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##### DAY TWO

- |              |   |
|--------------|---|
| <b>8:30</b>  | <b>Assignment Review</b>  |
| <b>9:00</b>  | <b>Forecasting from Data</b><br>Trends<br>Growth Rate<br>SWOT   |
| <b>10:15</b> | <i>Break</i>  |
| <b>10:30</b> | <b>Forecasting from Data, continued</b><br>Gift Range Chart<br>Development Plan and Budget<br>External Resources    |
| <b>12:00</b> | <i>Lunch</i>  |
| <b>1:15</b>  | <b>Strategies</b><br>Touch Point Analysis<br>Solicitation Strategies<br>Donor Recognition Strategies                |
| <b>2:30</b>  | <i>Break</i>  |
| <b>2:45</b>  | <b>Sustainability Management</b><br>Components of Annual Sustainability<br>Tools, Metrics, Timelines<br>Action Plan |
| <b>4:30</b>  | <b>Closing Activities</b><br>Summary, Q&A<br>Evaluations<br>Certificates  |
| <b>5:00</b>  | <b>Adjourn</b>  |