Principles & Techniques of Fundraising

COURSE AGENDA

DAY ONE

8:00 a.m.  Registration

8:30 a.m.  Opening session
           Introductions
           Expectations and Obstacles
           Course Overview
           The Cube
           Giving USA Reports on Philanthropic Giving
           Ethical Frameworks for Fundraising

10:00 a.m.  Break

10:15 a.m.  The Fundraising Cycle
           An Overview of Fundraising
           Institutional Readiness – A Marketing Approach

11:45 a.m.  Lunch

1:00 p.m.   Constituencies and Environments
           Understanding the Marketplace

2:30 p.m.   Break

2:45 p.m.   Case for Support
           Institutional Readiness: The Case
           Mission and Case Exercise

5:00 p.m.   Adjourn
Principles & Techniques of Fundraising

COURSE AGENDA

DAY TWO

8:30 a.m.   Selecting the Right Fundraising Vehicle
            The Annual Fund Program

10:00 a.m.  Break

10:15 a.m.  Building the Base
            The Internet, e-Fundraising, Social Media
            Direct Mail
            The Special Event

12:00 p.m.  Lunch

1:15 p.m.   Prospective Donor Research

2:30 p.m.   Break

2:45 p.m.   Major Gifts
            Solicitation exercise

5:00 p.m.   Adjourn
Principles & Techniques of Fundraising

COURSE AGENDA

DAY THREE

8:30 a.m.  The Capital Campaign
           Working with Consultants

10:15 a.m.  Break

10:30 a.m.  Planned Giving

12:00 p.m.  Lunch

1:15 p.m.  Corporations and Foundations as Markets

2:45 p.m.  Break

3:00 p.m.  In-Box Exercise

5:00 p.m.  Adjourn
Principles & Techniques of Fundraising

COURSE AGENDA

DAY FOUR

8:30 a.m.       Budgeting and Managing for Fundraising
10:00 a.m.      Break
10:15 a.m.      Volunteerism, Boards, Leadership, and Team-Building for Fundraising
11:45 a.m.      Lunch
1:00 p.m.       Application of Principles, Part I, Preparing a Fundraising Plan
2:45 p.m.       Break
3:00 p.m.       Review of Expectations and Obstacles
                Application of Principles, Part II, Resources Inventory Analysis
                Preparing a Statement of Objectives
                Course Evaluations
5:00 p.m.       Adjourn