Principles & Techniques of Fundraising

The baseline course for all of The Fund Raising School courses.

Our Trademark Course - The Definitive Training Program for Fundraisers

Recognized internationally, Principles & Techniques gives you the foundation and inspiration to lead your nonprofit to its financial goals. It provides you with the framework for operating a successful total development program. It is an intensive four-day, A-through-Z training program that is the basis for the rest of the School’s courses.

You’ll Learn How To

- Identify and validate prospective donors
- Manage the fundraising process
- Use research to match a donor’s interests & needs with your nonprofit’s mission and goals
- Build an annual fund donor base that keeps on giving
- Manage the process of raising money
- Recognize planned giving benefits to your donors and to your nonprofit
- Structure a successful solicitation
- Respond to challenges and ethical dilemmas with professional skill.

What You’ll Receive

- On flash drive, a comprehensive 700-page Study Guide plus an accompanying workbook
- Gift club ideas
- Board Strengths Inventory
- Donor evaluation forms
- Invaluable bibliography from the Center on Philanthropy at Indiana University
- Formulas for establishing best-practice benchmarks
- A chance to network and build long-lasting, cross-mentoring relationships with other professionals.

The Fundraising Cube

You also will receive The Fund Raising Cube, a desktop reminder of The Fund Raising School’s Management Process. It is a handy reference and a point of pride for alumni.

Class Schedule

Day 1  8:30 a.m. - 5:00 p.m.
Day 2  8:30 a.m. - 5:00 p.m.
Day 3  8:30 a.m. - 5:00 p.m.
Day 4  8:30 a.m. - 5:00 p.m.
# Principles & Techniques of Fundraising

## COURSE AGENDA

### DAY ONE

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>8:00 a.m.</td>
<td>Registration</td>
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<tr>
<td>8:30 a.m.</td>
<td>Opening session</td>
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<tr>
<td></td>
<td>- Introductions</td>
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<td>- Expectations and Obstacles</td>
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<td>- Course Overview</td>
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<td>- The Cube</td>
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<td>- Giving USA Reports on Philanthropic Giving</td>
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<td>- Ethical Frameworks for Fundraising</td>
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<td>10:00 a.m.</td>
<td><strong>Break</strong></td>
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<tr>
<td>10:15 a.m.</td>
<td>The Fundraising Cycle</td>
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<td></td>
<td>- An Overview of Fundraising</td>
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<td>- Institutional Readiness – A Marketing Approach</td>
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<tr>
<td>11:45 a.m.</td>
<td><strong>Lunch</strong></td>
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<tr>
<td>1:00 p.m.</td>
<td>Constituencies and Environments</td>
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<td>- Understanding the Marketplace</td>
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<tr>
<td>2:30 p.m.</td>
<td><strong>Break</strong></td>
</tr>
<tr>
<td>2:45 p.m.</td>
<td>Case for Support</td>
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<td>- Institutional Readiness: The Case</td>
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<td></td>
<td>- Mission and Case Exercise</td>
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<tr>
<td>5:00 p.m.</td>
<td><strong>Adjourn</strong></td>
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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

Awarding of Certificates of Completion

5:00 p.m.  Adjourn