

SUSTAINABLE FUNDING INSTITUTE
SEDONA COMMUNITY CENTER
January 28th and 29th, 2010

Thursday the 28th

8:30 – 9

Continental Breakfast

9 – 9:30

Introductions and Overview

9:30 – 11:30

Becoming a Fundraising Organization

Becoming a successful fundraising organization can help your Program bring more resources to your mission. An organizational culture of philanthropy will build the relationships that lead to greater resources and community support. It promotes attitudes and behavior throughout the organization that integrate philanthropy as a way of doing business.

Learning Objectives

- You will learn what it means to become a fundraising organization.
- You will build your own skills so that you can help lead your Program to adopt a culture of philanthropy.
- You will be able to identify the roles and behaviors of staff and volunteer leadership as your Program integrates philanthropy as a way of doing business.
- You will identify “next steps” that can be taken to position your Program for fundraising success.

11:30 – 12

Lunch from Oak Creek Brewery

12 – 1:30

Development 101

This module is a basic introduction for anyone new to the fundraising process and a review of current best practices for those already involved. We will explore a range of techniques for how to develop potential individual donors from their first gift to your annual fund through planned gifts as well as corporate and foundation gifts and special events. There will also be a discussion on how these various techniques are connected and how you can define which techniques are the most appropriate for your Program.

Learning Objectives

- Define the basic elements of “Best Practices” fundraising.
- Understand the differentiation of various donor pools.
- Review the requirements to be successful in each of these elements.
- Define which of these techniques will be successful within your own Program.

1:30 – 3

Case for Support

To be a successful fundraising organization, your Program needs a clear statement of its mission, vision, values and prioritized objectives. In this interactive course, you will review the definition of a philanthropic case for

support and how it is used in a variety of ways within an organization. There will be an opportunity for you to identify the mission, vision, values and objectives of your Program – the elements of your case – followed by group discussion.

Learning Objectives

- Begin to define the key elements of your mission, vision, values and strategic objectives.
- Review how to include your stakeholders in a discussion of these elements.
- Define what makes your case compelling and distinctive.
- Discuss how your Program is showing direct impact in your community.
- Prepare a list of your own Program's key case statement elements and have the opportunity to present your case for support in a larger group discussion.

5:30 – 7

Evening Event: The Board's Role in Fundraising

We will begin with an overview of what makes a successful non-profit Board, but the session will largely focus on the Board's role in fundraising. After a basic review of the fundraising cycle, the group will be led through a discussion of how Board members can help to identify, cultivate and, finally, solicit support for the organization that they help lead. We will focus on ideas you can use, including your "elevator speech" and how staff can nurture the Board's role in fundraising.

Learning Objectives

- You will learn how the Board can become a more successful component of a strong non-profit.

For Board members:

- Build fundraising skills and learn that making the ask is only one part of getting a gift.

For non-profit staff:

- Give Board members better tools and help them be more comfortable fundraising partners.

Friday the 29th

8:30 – 9

Continental Breakfast

9 – 11

Introduction to Major Gifts

First, we will define the essentials for a successful major gift program including the role of the Board and senior management, staffing requirements, the case for support, identification of potential major donors,

effective cultivation strategies, solicitation, preparation and stewardship. During this module we will discuss the various motivations for major donors and ways to start a Major Gift Initiative for your Program. We will also address the current economic climate and its impact on major giving.

Learning Objectives

- Define what constitutes a Major Gift Initiative.
- Focus on identifying your prospects and identifying your major gift “team” (everyone should play a part!).
- Understand the life cycle of a donor.
- Review the steps of identification, cultivation, solicitation and stewardship.

11 – 1:30

Creating a Fundraising Plan (working lunch from Joey’s Bistro)

In this hands-on module each Program will outline a mini-fundraising plan with timeline and budget parameters. Immediate next steps will be integral to this plan. The group will review your outline and help to problem-solve key challenges for your Program.

Learning Objectives

- Define the essentials of a fundraising plan.
- Begin to create your own fundraising plan by applying the concepts of your previous coursework.
- Strategize challenges to effectively take your fundraising plan forward.

1:30 – 2:30

Improving your Current Situation

What have been your most vexing fundraising challenges? What issues have been raised in our training that you would like to explore further from your own Program’s vantage point? How do you take what you are already doing and make it stronger and/or evolve it into something else? What resources, both human and capital, will you need to take your Program to the next level? We will facilitate a group discussion that will identify options for your Program. This session will include a Q&A session

Learning Objectives

- Individualize the training by giving you the opportunity to discuss current fundraising challenges within your Program.
- Learn how to assess your current fundraising activities.
- Establish your next level of goals and objectives for better revenue.
- Identify resources needed and next-step actions to move your fundraising program forward.

2:30 – 3

Closing Remarks

Evaluations and Certificates