

STRATEGIC FUNDRAISING COACH

STRATEGIC FUNDRAISING ACADEMY

Whether you are beginning a career as a fundraiser or you are a seasoned veteran, you can customize your lesson plan around your specific needs. Learn what you need, when you need it, through personalized coaching. Jump-start your fundraising success with these lessons, simple tools and templates.

You will have the opportunity to listen, discuss, practice and read within each topic area. I will provide you with a collection of resources and tools curated to teach best practices and reinforce success.



StrategicFundraisingCoach.com

LESSON 1 – PHILOSOPHY & ETHICS

(It all starts with the right perspective)

- Why people give/don't give
- Myths & beliefs
- Casting a vision
- Being donor-centered
- Investments, transparency & integrity
- Responsibility & credit
- Essentialism
- AFP Code of Ethics

LESSON 2 – FUNDRAISING FUNDAMENTALS

(Be sure you're starting on solid ground)

- Types of donors (individuals, foundations, corporations)
- Types of fundraising (grants, special events, major gifts, memberships, sales, annual appeals, capital campaigns, sponsorships)
- Types of gifts (pledges over a multi-year period, cash or credit card, appreciated stock/securities, insurance, gifts-in-kind, planned gifts, bequests)
- Surprising statistics

LESSON 3 – PREPARING FOR SUCCESS

(To succeed you must prepare)

- Our own relationship w/money
- Language/terminology
- Articulating the nobility of the profession
- Leadership's perspective
- Organizational culture & mission
- Donor-centered engagement

LESSON 4 – DONOR RELATIONS, STEWARDSHIP, STAGES & CYCLES

(It's all about building genuine, healthy relationships)

- Establishing lasting and valuable relationships
- Respecting donor preferences
- Tracking folders
- Creative gratitude stewardship plans
- Gift receipts, notes, letters, & calls
- Cultivation stages and cycles

LESSON 5 – ANNUAL SUSTAINABILITY

(You've got to build the pipeline)

- Sources for sustainability
- The annual fund calendar
- The secret to staying on schedule
- Gift range charts
- The letter, style & message
- Phone-a-thons
- Acquiring and upgrading donors

LESSON 6 – PROSPECTS & PORTFOLIOS

(Essential knowledge and tools for high performing fundraisers)

- Cultivation cycle & stages
- Moves management
- Qualifying & ranking prospects
- Identification, evaluation and peer reviews

LESSON 7 – MAJOR GIFTS

(Who wants to raise more money?)

- Moves Management
- Getting the appointment
- Building skills & confidence
- Master the soft skills
- Getting comfortable working with ultra-wealthy donors
- A fundraisers frame of mind
- Secrets to raising more money



LESSON 8 – SOFTWARE, RESEARCH, BRIEFINGS & CONTACT REPORTS

(Essential knowledge to be effective and efficient)

- Fundraising systems: Razors Edge, Donor Perfect, Bloomerang & other options
- Features, functions, & sophisticated capabilities
- Integration with other systems
- Resources for research
- Peer reviews
- Format and function
- Significant personal visits
- Key elements of meaningful contact reports
- Confidentiality and security

LESSON 9 – BOARDS & VOLUNTEERS

(Fundraising is a team sport)

- Primary partners and natural players
- Helping board members overcome the fear of fundraising
- Ways to liven up your board meetings
- Transformation from fear to confidence
- Leading by example
- Accountability
- Committees, meetings, & retreats
- Common pitfalls

LESSON 10 – SUCCESSFUL SOLICITATIONS

(Don't leave money on the table)

- Planning, preparation and presentation
- Anatomy of a solicitation
- Who does the asking, for what, & how much
- How decisions are made & who makes them
- Location & settings
- Expressing the case
- The actual "ask"
- Reactions and objections
- Working in pairs and the role play

LESSON 11 – PLANNED/LEGACY GIVING

(Take a strategic approach)

- Preparing for planned giving program
- Understand how to attract legacy gifts
- Donor characteristics
- Identifying bequest prospects
- Integrating planned & major gifts
- Bequests, trusts, annuities, and gift scenarios
- Other popular gift planning techniques

LESSON 12 – EVENTS

(Make them worth the effort)

- Strategic special events, all types & styles
- Cost to raise a dollar
- Best practices
- Committees & volunteers
- Third party & partnerships
- Pre-planning your post-plan

LESSON 13 – STRATEGIC SPONSORSHIPS

(Offer sponsorship opportunities they can't afford to turn down)

- Securing high-dollar sponsors
- Qualifying prospects
- Preliminary visits
- Key questions
- Securing "Buy-in"
- Acquisition and activation
- Proposals

LESSON 14 - CAPITAL, ADVANCEMENT, & ENDOWMENT CAMPAIGNS

(Essential information whether you're contemplating a campaign, in the midst of one, or want help to finish strong)

- Cultivation cycle & stages
- Moves management
- Qualifying & ranking prospects
- Identification & Evaluation/Peer review
- The campaign "cabinet"
- Case for support
- Setting the goal
- Feasibility studies
- Campaign budgets
- Supportive documents
- Donor pyramid
- Phases of a campaign
- "Going public"
- Matching Gifts
- Pledges and legal obligations
- Celebrating the milestones

LESSON 15 - GEN X & MILLENNIAL DONORS

(Fundraising trends you need to know)

- Trends in philanthropy
- Diversity in fundraising
- Strategies for engaging younger donors
- Why and how women give
- Surprising statistics

LESSON 16 - GRANTS & SCHOLARSHIPS

(Don't start grant writing until you take this class)

- Demystifying grants
- Types of grants and applications
- Funding sources & research tips
- Proposal writing
- Reports and red tape
- Stewardship
- Impact of scholarships
- Changes in leadership

LESSON 17 - METRICS & ACCOUNTABILITY

(A must-take class before you ask for a bonus or a raise)

- Forecasting revenue & expenses
- Dollars raised, average gift amount, response & retention rates and other measurable results
- Key fundraising performance indicators
- Reports for measuring success
- Common concerns

LESSON 18 - DEVELOPMENT CAREER COACHING

(Prepare and plan for your dream job)

- Qualities of a high-performing fundraiser
- Associations, classes and trainings
- Networks, resources, and special connections
- Learn how to find a nonprofit job that fits
- Assistance with reviewing and evaluating job opportunities
- Recommendations for customizing cover letters and resumes
- Notes and letters of recommendation
- Interview preparation and mock interviews
- Gain confidence and get relaxed before the interview
- Post-interview debrief
- Help with interpreting communication from potential employers
- Have a framework for evaluating job offers
- Help with negotiating job offers
- Receive encouragement, insight, and inspiration
- Fresh development tools, tips, and resources
- Onboarding to help you get off to a great start!

