Chicago Fundraising *Accelerator:*
2 Day Boot Camp
Course Syllabus

DAY 1: Overview, Segmentation, and Individual Giving

I. **Welcome & Introductions:**
As peer learning is such a critical component, the program launches with introductions and an icebreaker to promote engagement between participants. Also, feedback will be gathered from the group on the specific challenges people want to discuss and expectations for the program. We will revisit this list at the end of the program to ensure topics have been addressed.

II. **Overview of Fundraising in Nonprofits:**
This module defines philanthropy, identifies reasons donors give and explains why creating a culture of philanthropy is so important in small organizations. Historical national giving trends are reviewed along with primary sources of revenue. We will also explore the importance of diversified funding streams, how strategic plans drive development goals and budgeting best practices.

Objectives:
- Definition of philanthropy
- Identifying top reasons donors give
- Define culture of philanthropy and why it is especially important in small shops
- Understanding historical giving trends and how they relate to your nonprofit
- Review of a funding matrix and importance of diversification
- Budgeting best practices for development

III. **Customized Segmenting:**
Participants will use their donor base data that was required in the prework, to be used in a series of exercises. The focus of this section will be to analyze existing revenue categories and giving trends over a three-year period. The data will then be used to set preliminary benchmarks and identify opportunities for growth.

Objectives:
- Overview of components: grid showing all options for revenue (pre-course work)
- Comprehend the importance of benchmarking for growth
- Understand the concept of lifetime donor value
- Calculate ROI for each funding stream
- Preliminary Key Performance Indicators (KPIs) set for 2018

IV. <u>**Individual Giving**</u>:
One-third of all donations occur in December, with 12% of all donations happening the last three days of December. Giving by individuals is the most significant source of potential funds. This module will focus heavily on how to maximize individual giving in the annual fund, as well as how to identify your best major donor prospects. Participants will use their segmented database to analyze their donor potential.

Objectives:
- Understand the donor giving cycle
- Understanding the difference between major donors, annual fund donors and planned giving prospects
- How to identify each within your database
- Using segmentation and testing in annual appeals
- How to evaluate your top major gift/ planned giving prospects using ABC (Access, Belief in Mission, Capacity)

V. <u>**Major Gifts:**</u>
Now that you know who your best major gift and planned gift prospects are, let's develop our plan to move them up the donor pyramid. In this module we will explore how to start a major gifts program without dedicated staff and how to engage your board in fundraising.

Objectives:
- Understand steps to get started without dedicated major gifts staff
- How large should your portfolio be
- Identify the tools and resources you can use for 5-10 "touches"
- How to engage volunteers (primarily your board) in major gift work
- What information should be included in major donor plans
- How to integrate these plans into your day-to-day operations

End of Day One: Magic Matrix Exercise as homework

DAY TWO: Other Revenue Streams, Development Plans, & Communication

VI. <u>**Foundations & Corporations:**</u>
Here we focus on best practices when working with foundations & corporations. This will include how to identify potential funders, what actions to take before submitting a grant, and how to respond should you not receive the grant.

Objectives:
- What to do prior to submission
- Understand the five questions you need to answer with every grant proposal
- Boilerplate Structure and how to use it
- Special needs of corporate funders (board representation and volunteer opportunities)

VII. **Special Events:**
This section will focus on understanding the difference between donor cultivation and fundraising events, how to determine to the actual cost of each (i.e. net revenue) and how to make each more effective.

Objectives:
- Differentiate between donor cultivation and fundraising events
- Best practices for special events
- Timeline for planning
- Best practices for event follow-up

VIII. **Development Plan Outline:**
In this module, we will review the Magic Matrix homework used to prioritize the best revenue opportunities for your organization, create development plans around these opportunities, and how to integrate action steps into daily functions. This portion provides an opportunity to fully flush out the opportunities and develop a realistic plan to integrate them into your organization.

Objectives:
- Create development plan on top 2-3 opportunities
- Develop actionable steps for each opportunity
- Learn how to integrate action steps into existing operation

IX. **Communications:**
Use communication to build knowledge of work and support development efforts. In this module, we will end with understanding the concept of a content calendar and how to schedule cultivation events around existing programs.

Objectives:
- Understand the value of a content calendar
- Develop strategy to support fundraising efforts
- Create a content calendar to support your identified opportunities

X. **Conclusion and Program Evaluation:**