



## **Breakout Session Descriptions**

*As of December 12th*

### **Elevating your Fundraising Strategies**

Do you feel like your fundraising efforts are going well, but sense that you could be doing things more effectively, efficiently, or collaboratively in your organization? Many organizations have successfully implemented fundraising programs and plans, but struggle with limitations due to capacity, focus, prioritization, urgency, support, and strategy that may hold them back in reaching their goals. This session will provide an interactive discussion of some common pitfalls, challenges, limitations... and solutions – that we have seen in over 40 years of helping others achieve their fundraising goals.

This is a session for development leaders and executives who may already have a solid development program, and are looking to strengthen their fundraising efforts and strategies while eliminating obstacles to growth.

The goal of this session is for attendees to identify 3-5 opportunities for improvement of their development efforts that they can pursue in 2024 to make the most of their fundraising efforts for the advancement of their missions.

### **Core Strategy: Narrowing Focus for Broader Impact**

Traditional fundraising methods often cast a wide net hoping to catch as many donors as possible. But what if a more focused, strategic approach targeting a specific group of donors could produce even more significant results? This session will illuminate the importance of a “core strategy” in fundraising and how to implement one.

Attendees will learn:

- The underlying principles of a core strategy in fundraising.
- How to identify and engage with key donors.
- Techniques for cultivating deeper relationships.
- Maximizing the impact of your efforts with fewer resources.
- Case studies that demonstrate the effectiveness of this strategy.
- Tools and strategies to implement post-seminar.

This session is geared for Campaign Managers, Development Coordinators, and those who play a pivotal role in nonprofit fundraising strategies and desire to optimize their strategies and get more from fewer, deeper relationships.



## **The Power of a Strategic Thinking Culture to Transform Your Organization**

Is your organization poised to raise much-needed funds, but you struggle to articulate why your project is essential to your mission? Do your donors seem unmotivated by your case for support or ask questions about ministry impact that you can't answer? Do your staff and/or faculty falter in translating missional priorities into their everyday work?

If current and future effectiveness is desired, but seems an unattainable reality, we invite you to learn more at this session. We will engage with the following content:

- How a compelling strategic plan leads incrementally toward missional effectiveness.
- Best practices for strategic planning and thinking that will be actually used and relied upon.
- Real-life stories of programmatic and fundraising success to encourage and motivate .
- How to increasingly engage givers, raising the funds you need and strengthening ownership of your mission.

Strategic planning is a team sport! Executive directors, heads of school, development officers, and board members can all benefit from this session.

## **Developing a Compelling Vision with Your Leader**

Do you have a compelling vision that your major donors get excited about? Does your organization have a new senior leader who is beginning to develop their strategic vision? Does your CEO / President / Head of School see the need for a vision that is inspiring and aspirational? A successful campaign is built on a compelling vision that major donors want to get behind, and plans that only speak to internal constituencies often do not get funded. So how does one develop a vision that engages the people who will need to fund its fulfillment?

In this session we will share practical ways to develop a vision that propels your organization forward, while also capturing the hearts of your major donors. Attendees will learn:

- How to work with your executive leader to understand the strategic difference of a donor-centered vision.
- How to align internal stakeholders toward a larger vision than they realized is possible.
- How to include the voice of your major donors in your vision and planning.
- How to ask major donors to give to a vision they are excited to fund.

This session is tailored for executives and development leaders.



## **Integrating Annual Fund and Campaign Asks**

A campaign is overlaid on top of all the annual and ongoing needs of any organization. Therefore, navigating a campaign while maintaining ongoing annual funding can be challenging for fundraising professionals. How do we ask for major, campaign-related gifts while maintaining the funding for annual needs at the same time? There is hope! In this session we will cover best practices for how to ask for both campaign-related gifts and annual gifts at the same time. It might actually make your work easier than you originally thought!

## **The Roles of the Senior Leader and the Board in a Successful Campaign**

Fundraising is not typically the “Number One” job of the President or board members. However, during a campaign, it will be the number one priority for both the President/CEO, the Board Chair, and members of the Board. Our speakers will share their unique insights and counsel on the challenges CEOs and Board chairs face during a campaign.

Topics to be addressed by the panel include:

- Who articulates the Vision and Mission for the Campaign?
- How important is it that the organization has an up-to-date Strategic Plan?
- How much time should the President/CEO as well as key Board members allocate from their normal schedules?
- Who should develop the plan to involve members of the Board as possible advocates, facilitators, or askers in the campaign?
- What are the typical budgetary impacts of a campaign?

The session will be an interactive dialogue with ample opportunity for Q&A and will be helpful for Presidents/CEOs, Board members, and chief fundraising officers.



## Embracing the Donor

People give where they know and trust the people running the organization. Embrace ways to develop genuine relationships with donors that lead to trust and increased commitment over time. And, experience the joy when a donor is pulled so close that they feel the heartbeat of the organization and become part of something bigger than themselves!

Participants will learn:

- The backdrop for embracing the donor (a quick overview of the basics).
- The process of developing relationships and trust.
- Creative ways to say thank you or give “donor touches”.
- How to move a donor with the capacity to increase giving.
- That working with donors can be an amazing ministry!

This session is for development team members including Executive Directors, Board members, and paid staff (Development Directors, Major Gift Officers, etc.).

## Life Between Campaigns

When a capital campaign is completed, a few things happen: the project may begin construction, final gifts come in, thank you notes are sent, and we always want to make sure to celebrate. But it’s also the time for leaders and staff to double down on investing in relationships – to remember that it’s a marathon, not a sprint.

Life “*between*” campaigns or simply “*after*” a campaign is a fantastic time to invest in key relationships. It’s a time to continue and grow deeper with those who were your lead donors; it’s the time to continue with a solid, well thought-through communication strategy to your entire donor constituency; and it’s a chance to cultivate relationships with the next generation of givers to your organization.

Join us as we fine tune the principles and framework behind fundraising in a capital campaign and remember the value, even when we are *not* in a campaign.



## **Understanding the Mindset of Major Donors**

Topic/Problem Addressing:

This session will provide insights into how major donors – people with wealth - think about money and what motivates them to give. When you think about mindsets, many development directors don't fully grasp the unique and diverse range of personalities and worldviews. CEOs or major gift officers will gain greater appreciation and wisdom for major donors as they build genuine friendships over time.

Participants will gain:

- Insights into how people of wealth think about money.
- A new appreciation for the rich diversity of motivations of major donors.
- Understanding of the joys and challenges of being a major donor and practical wisdom on how to develop genuine friendships over time.

This session is for CEOs, development professionals and campaign managers with limited experience in major donor fundraising.

## **Securing Non-Cash Gifts**

Non-cash assets often represent up to 90% of a donor's wealth (read: gift potential). In this hands-on praxis workshop, you will gain insight into how to engage your donors to secure these gifts, strategies to recommend for the most common gifts and how to "make the ask".