

How to Build and Implement an Extraordinary Major Gifts Program

October 26-28, 2020

Workshop Leader: Herb Soles, CFRE, IAP-L, ISM Consultant

Daily Modules Held Eastern Daylight Time (EDT):

11:00 am – 12:30 pm

1:00 pm – 2:00 pm

3:00 pm – 4:30 pm

Monday
October 26

- 11:00 – 12:30 Module 1
Why Are We Here and Where Are We Going
- Introduction and procedure
 - Concerns?
 - Raising Big Money in Difficult Times
 - Seven Key Strategies for Now
 - Workshop Goals and Outcomes
 - Creating Personal Action Plans
 - Defining Major Gifts
 - Why Donors Make Major Gifts
 - Independent Schools Are in an Ideal Position

- 1:00 – 2:00 Module 2
Discussion: Our Major Gift Effort

- 3:00 – 4:30 Module 3
How Do Major Gifts Affect Capital Campaigns
- What Are We Seeking
 - Three Keys to a Successful School
 - Where Do We Get Our Resources Come
 - The Role of the Capital Campaign
 - Campaigns Based on Data
 - Three Key Planning Documents
 - Assessments
 - How Major Donors Are Essential to Campaign Success
 - Campaign Anatomy
 - The Case for Support
 - The Value of a Feasibility Study

Tuesday
October 27

- 11:00 – 12:30 Module 4
The Individual Donor Is the Key to Success
- Why Do We Do This?
 - The Six Secrets of Successful Solicitation
 - Helen Colson's Checklist
 - Socratic Philanthropy

- 1:00 – 2:00 Module 5
Discussion: Socratic Philanthropy
- 3:00 – 4:30 Module 6
Take Your Extraordinary Major Gifts Program to the Very Highest Level
- Why Are We Doing This?
 - Planned Giving Demystified
 - What a Qualified Prospect Looks Like
 - Assets, Bequests
 - Five Step Program to Create a Supportive Planned Giving Initiative

Wednesday
October 28

- 11:00 – 12:30 Module 7
Creating Structure for an Extraordinary Program
- Where Are We Today?
 - How Do We Improve?
 - Characteristics of a Typical Fully Functioning Major Gifts Program
 - What Are We Going to Do?
 - Create an Action Plan/Action Plan Review with Q & A
 - ✓ Identification System
 - ✓ Engagement System
 - ✓ Evaluation System
 - ✓ Solicitation System
 - ✓ Recognition System
 - ✓ Stewardship System
- 1:00 – 2:00 Module 8
Fun With Case Studies
- 3:00 – 4:30 Module 9
Managing Major Donor Relations Through Leadership and Ethical Influence
- Scientific Research on Ethical Influence
 - What Great Leaders Say About Persuasion
 - Words of Advice
 - Wrap-up,
 - Putting it All Together
 - Final Q and A