

# How to Build and Implement an Extraordinary Major Gifts Program

April 19-20, 2021

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  
April 19

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

### 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

3:00 – 4:30

## Module 3

### 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
- Discussion: Socratic Philanthropy

Tuesday  
April 20

11:00 – 12:30 Module 4

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

1:00 – 2:00 Module 5

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

3:00 – 4:30 Module 6

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