

Learning Labs: Fundraising & Resource Development Session Schedule and Key Takeaways

May 11, 2017 (Thursday)

9:00 am – 12 noon

Pre-work: Bring your board list and existing case materials

Session 1 – Making the Case for Your Nonprofit

Instructor: Doug Wingo, Principal and Christa Orth, Consultant, Wingo NYC

Key Takeaways:

- How to make the case for support for individual, corporate, and foundation prospects
- Understand the process for creating case materials, including your elevator pitch
- How to implement your case materials and activate your board members and volunteer solicitors.

Exercise: Write & role play elevator pitch for one income stream

Homework: Practice your elevator pitch 5x and teach it to another staff member.

May 22, 2017 (Monday)

9:00 am – 12 noon

Pre-work: Bring a laptop or tablet for session exercise

Session 2 – Responsible Fundraising & Resource Development

Instructor: Angelie Singla, Director, Corporate, Foundation & Government Relations at South Nassau Communities Hospital

Key Takeaways:

- How to conduct research and prospect funds
- Understand the fundamentals of compliance & reporting

Exercise: Create a template profile on a foundation/corporation you would like to support your organization

Homework: Research 3 prospects

June 8, 2017 (Thursday)

9:00 am- 12 noon

Pre-work: Bring 3 prospects

Session 3 – Inclusive & Holistic Fundraising

Instructor: Greg Cohen, Associate Director Cause Effective

Key Takeaways:

- Understand how to work with staff and board to craft strategy
- How to work with the board to guide, monitor, and celebrate fundraising in the organization and at the board level
- Learn how to maintain and cultivate donor and funder relationships

Exercise: TBA

Homework: - TBA



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June 20, 2017 (Tuesday)

9:00 am – 12 noon

Pre-work: Bring data on funds raised per donor type and your development plan (if you have one)

Session 4 – Intentional and Sustainable Fundraising

Instructor : Kelly Dunphy, Vice President, Orr Associates Inc.

Key Takeaways:

- How to craft your development plan
- Learn tools to assess revenue streams and diversification
- How to craft (or assist your board to craft) both realistic and stretch funding goals
- Developing a tracking system

Exercise: TBA

Homework: Identify 3 donors and create the plan for reach donor

July 13, 2017 (Thursday)

2:00 pm – 5:00 pm

Pre-work: Bring examples of current materials being used to communicate with donors and any existing donor communication plans.

Session 5 – Resource Development Communication

Instructor : Craig Shelley, Vice President, Orr Associates Inc

Key Takeaways:

- The value and purpose of a donor-centered approach to communications
- Understand the tools to keep donors and engaged and reengage lapsed donors
- How to communicate impact and outcomes regularly

Exercise: Critiquing and improving donor communication pieces

Homework: Develop donor communication plan

August 1, 2017 (Tuesday)

2:00 pm – 5:00 pm

Session 6 – Culture of Philanthropy

Instructor : Greg Cohen, Associate Director Cause Effective

Key Takeaways:

- Identify the key practices for a culture of philanthropy
- How to develop donors as solicitors on behalf of the organization
- Learn how to strategize and link new program developments with revenue generation

Exercise: Plot out culture of philanthropy for a donor or fundraising goal for various staff roles.

Following Session 6 there will be a celebration and cocktail hour hosted at NPCC from 5:00 -6:00 pm at NPCC offices. All facilitators are invited to attend.