

**United Way Agency Strategic Transition Series**  
**Session 3: Assessing Current State /Fund Devp Tools & Techniques**  
**Thursday, July 12, 2018**  
**9:00 am to 12:00 noon**



**Overview:**

The purpose of today's workshop is to provide an overview of key fund development components along with corresponding planning processes, helping agencies assess the success of their existing fund development efforts and build or expand a framework for best practice fund development programs.

Objectives of this workshop:

- Better understand the many fund development models and which suits their agency
- Improve insight about primary components of fund development and planning processes
- Provide an opportunity to assess an agency's existing fund development efforts
- Apply knowledge gained to build a toolkit of ideas for (better) pursuing contributed income

**Workshop Agenda**

Time	Activity
9:00 am	<p>Welcome and brief Series &amp; prior session Overviews- Julie Simon, Director of Agency Capacity Building Initiatives, United Way</p> <ul style="list-style-type: none"> <li>■ Commences session; highlights intent of Series &amp; previous session take-aways</li> <li>■ Reminds of presentation recording for later viewing by non-attending agencies</li> <li>■ Describes today's session objectives, agenda, rules and roles</li> <li>■ Introduces presenter</li> </ul>
9:10 am	<p>Presentation interspersed with Break-Out Exercises on Fund Development Tools &amp; Techniques - Wendy Dyer, Wendy Dyer Fund Development Consultants</p> <ul style="list-style-type: none"> <li>■ Participants can take notes on hard copy PP presentation included in packets</li> <li>■ Questions welcome during presentation via microphones placed in the room</li> <li>■ In small groups/individually, participants will contemplate and discuss: <ul style="list-style-type: none"> <li>○ The various funding models, including those best suited to their agency</li> <li>○ The effectiveness of their existing efforts/plans and areas for improvement</li> <li>○ Building gratitude into plans</li> </ul> </li> </ul> <p><b>Break – 10 minutes</b></p> <p>Presentation continued, with Break-Out Exercises on improving development efforts:</p> <ul style="list-style-type: none"> <li>■ In small groups/individually, participants will review and discuss: <ul style="list-style-type: none"> <li>○ How to build/enhance their agency's gift table</li> <li>○ Key techniques, tools and/or templates that can help strengthen their (agency's) development planning efforts</li> </ul> </li> </ul>
11:30 am	<p>Discuss highlights of training experience - All</p> <ul style="list-style-type: none"> <li>■ Small groups report out insights gained from exercise</li> <li>■ Participants share greatest take-aways for improving fund development efforts</li> </ul>
11:45 am	<p>Wrap-Up - Julie Simon</p> <ul style="list-style-type: none"> <li>■ Reminder to complete and submit workshop survey before leaving</li> <li>■ Briefly connects Session concepts to next – 4: Program Fin Sustainability (9/13)</li> </ul>
12:00 noon	<b>Adjourn</b>