

Member Agency Strategic Transition Series

Session #11: Deeper Dive to Improve Fund Development Results

Friday, April 12, 2019

9:00 am to 12:00 noon

Overview:

The purpose of today's workshop is to help agencies better operationalize and implement Development Plans and their key elements to generate more gifts, especially major gifts. Presenters also will explore higher level best practices in each funding bucket: foundations, corporations, events, and individuals including major gifts. Objectives of the workshop are to:

- Better understand best practices related to each of the private sector revenue streams.
- Advance learning on how major gift relationships provide an outstanding return on fundraising investment.
- Improve knowledge about how to incorporate healthy habits into your agency's fundraising program.
- Gain insight on digital opportunities, such as persuasive technology, social media & other platforms.

Workshop Agenda

Time	Activity
9:00 am	Welcome and brief Series Overview- Julie Simon, Director of Agency Capacity Building Initiatives, United Way <ul style="list-style-type: none">■ Commences session; reminds about Series intent, framework & microphone usage*■ Describes purpose of today's session■ Introduces presenter
9:10 am	Presentation & exercises on Deeper Dive into Fund Development – Wendy Dyer & Rachel D'Souza-Siebert <ul style="list-style-type: none">■ Participants can take notes on hard copy PP presentation included in packets■ Briefly recapping previous fundraising sessions, outlining multi-channel approach, including technology opportunities, deeper dive into best practices and exercises Break – 10 minutes (between 10:30 & 11am) Presentation continues, plus small group/ individual exercise: <ul style="list-style-type: none">■ Sharing more on best practices and outlining applications of racial equity lens in fundraising practices■ Small group/individual exercises
11:50 am	Discuss highlights and take-aways of workshop experience - All <ul style="list-style-type: none">■ Participants share greatest take-aways and next steps
11:55 am	Conclusion - Julie Simon <ul style="list-style-type: none">■ Reminder to complete and submit workshop survey before leaving■ Connect to next Session #12: Strategic Alliances – Part 1 (5/10/19)
12:00 noon	Adjourn

*UW requests Series participants use microphones so that all can partake in the learning experience.