



Principles and Techniques of Fundraising AGENDA

Day One

- 8:00** **Registration**
- 8:30** **Opening Session – pg. 9**
 Introductions
 Expectations and Challenges
 Course Overview
 The Cube
 Philanthropy, Development and Fundraising
 The Fundraising Cycle
- 10:00** **Break**
- 10:15** **The Philanthropic Landscape – pg. 21**
 Research on Philanthropic Giving
 Understanding the external environment
 Fundraising as an exchange of values
 Cube: *Institutional Readiness*
- 11:45** **Lunch**
- 1:00** **The Case for Support – pg. 39**
 Cube: *Institutional Readiness*
- 2:30** **Break**
- 2:45** **Constituency Markets – pg. 65**
 Focus on individuals as a constituency for fundraising
 Cube: *Institutional Readiness, Markets, and Vehicles*
- 5:00** **Adjourn**

The contents of this workbook follow in sequence with the course delivery. Use the page numbers next to each module for easy reference.



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Day Two

8:30 The Annual Fund Program – pg. 77
Cube: Vehicles

10:00 Break

10:15 Building the Base of Support – pg. 93
Focus on digital fundraising, direct mail, and special events
Cube: Vehicles

11:45 Lunch

1:00 Prospective Donor Research and Major Giving – pg. 115
Cube: Vehicles

2:45 Break

3:00 Solicitation Exercise – pg. 141
Cube: Dynamic Functions

5:00 Adjourn

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Day Three

8:30 Planned Giving – pg. 154

Cube: Vehicles

10:15 Break

10:30 Capital Campaigns – pg. 171

Cube: Vehicles

11:45 Lunch

1:00 Fundraising from Corporations and Foundations – pg. 187

Cube: Markets

2:45 Break

3:00 Volunteers, Boards, Leadership, and Team-Building – pg. 203

Cube: Human Resources

5:00 Adjourn

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Day Four

- 8:30** **Planning, Budgeting and Managing – pg. 219**
Cube: Management
- 10:00** **Break**
- 10:15** **Ethical Fundraising – pg. 241**
Cube: Dynamic functions
- 11:45** **Lunch**
- 1:00** **Application of Principles, Part 1,
Preparing the Fundraising Plan – pg. 273**
- 2:45** **Break**
- 3:00** **Application of Principles, Part 2,
Resources Inventory Analysis – pg. 285**
Review of Expectations and Obstacles
Preparing a Statement of Objectives
Course Evaluation
Certificates & celebration
- 5:00** **Adjourn**

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