

## ***Professional Education Series (PES)—A Virtual Public Offering***

### **A virtual professional education experience for development professionals**

Ideal for development professionals of all experience and skill levels, the Professional Education Series features real-time virtual training, individual coaching, and online reinforcement. The virtual workshop is comprised of eight 3.5-hour sessions over the course of nine weeks. The series also includes five 1-hour coaching sessions with certified Advancement Resources coaches who have experience working as front-line fundraisers, and one-year access to **myAR Plus** modules that provide valuable practice and reinforcement of the concepts and tools presented during the series.

This comprehensive series is designed to connect participants with the heart of philanthropy through powerful donor stories, interactive application exercises, intersession assignments, and breakthrough techniques for raising the level of philanthropy at their institutions. Advancement Resources' training content is derived from our own proprietary research and intense, in-depth interviews and observations among top development professionals; academic, medical, and nonprofit leaders; and major donors.

## **Syllabus**

### *First Coaching Session*

Focused on identifying the participant's goals for the Professional Education Series, establishing mutual expectations, and building a working relationship between coach and participant.

### Session 1: Donor-Centered Philanthropy

#### **Introduction**

A brief overview of the workshop, including the research and concepts that serve as its foundation.

#### **Understanding Donor Perspectives**

An opportunity to view the commitment process from donors' perspectives.

#### **Applying Process Concepts in Development**

A donor-centered tool for crafting effective and efficient strategies for donor engagement.

#### **Adapting to Personality Profiles**

Exploration of different personality styles and techniques for communicating with constituents more effectively.

## Session 2: Connecting with Potential Donors

### **Identifying the Right Donors**

A strategy for recognizing those donors who can help your organization best achieve its mission and help you prioritize your time for maximum effectiveness.

### **Requesting Meetings with Potential Donors**

An exploration of a variety of methods and skills for connecting with potential donors and securing meetings.

### *Second Coaching Session*

Focused on applying concepts from sessions 1 and 2 to specific donor engagement strategies.

## Session 3: Building Trust-Based Relationships

### **Optimizing the In-Person Meeting**

The five important steps for an effective in-person meeting, featuring how to set meeting objectives, ask high-value questions, and present organizational priorities.

## Session 4: Identifying Donor Passions

### **Locating Philanthropic Passion(s)**

Exploration of a clearly defined process for uncovering the deep-seated, philanthropic values of donors.

### *Third Coaching Session*

Focused on applying concepts from sessions 3 and 4 to specific donor engagement strategies.

## Session 5: Driving Meaningful Commitment

### **Matching Passions to Organizational Initiatives**

An overview of the possible next steps following the Process for Locating Philanthropic Passion™, and a process for connecting passions to organizational initiatives.

### **Building Effective Engagement Strategies**

An exploration of the important points to consider when designing an effective strategy for building donor commitment and soliciting meaningful contributions.

## Session 6: Securing and Stewarding Contributions

### **Securing Financial Commitment**

Tools and techniques that turn “asks” into gains and strengthen donors’ emotional commitment and financial support.

### **Creating Meaningful Return on Philanthropic Investment**

Methods for ensuring donors feel appreciated and valued throughout their continued relationship with the institution.

### *Fourth Coaching Session*

Focused on applying concepts from sessions 5 and 6 to specific donor engagement strategies.

## Session 7: Building Strategies for Donor Development

### **Creating Lifelong Donor Strategies**

Application of the Nine Navigation Points to build effective and resilient donor strategies for identified potential donors.

## Session 8: Partnering for Success

### **Mindsets of Philanthropic Partners**

Participants learn the mindsets of the organizational partners they work with and how these constituents view philanthropy.

### **Working Together**

Participants examine strategies for building effective, trust-based working relationships with institutional partners.

### *Fifth Coaching Session*

Focused on applying concepts from sessions 7 and 8 to specific donor engagement strategies, celebrating the progress the participant achieved during the workshop, and establishing next steps for building and maintaining strong donor engagement going forward.

### **myAR Plus** Program

Following the workshop series, participants will be enrolled in **myAR Plus**, an online reinforcement platform providing access to review modules to encourage ongoing professional development and application. During the 12-month enrollment period, participants will receive monthly reminder emails encouraging them to explore the premium resources related to various workshop topics.

**Topics include:**

- Donor Development Chart
- Donor Motivation
- Identifying the Right Donors
- Personality Profiles
- Requesting Meetings
- Setting Meeting Objectives
- High-Value Questions
- Organizational Update
- Process for Locating Philanthropic Passion™
- Collaborating at Meetings
- Engagement Opportunities
- Securing Financial Commitment
- Return on Philanthropic Investment

## **Structure**

### **Classroom Engagements**

Participants will attend eight 3.5-hour sessions in a real-time virtual classroom. This experience features networking opportunities, application exercises, and interactive facilitator support. Participants in each cohort should be prepared to attend all sessions, as this is not a webinar, and interactivity is essential to the success of the experience.

### **Pre- and Post-Work Assignments**

Prior to the workshop, participants will be asked to complete a pre-work assignment. Additionally, participants have the opportunity to create and complete additional application exercises.

### **Technical Requirements**

Participants should use the Zoom application for the workshop sessions, and the RingCentral (powered by Zoom) application for their Coaching sessions. They will be prompted to follow download instructions from the web browser of their choice. Participants should be prepared to use speakers, a microphone, a webcam (optional), and a consistent Wi-Fi connection.

To learn specific technical requirements, participants will receive a technical guide as part of their pre-work package.