

Transforming Your Organization with Individual Giving **A Virtual and Distance Learning Experience**

Join us to discover how individual giving can propel your nonprofit to greater success. In *Transforming Your Organization with Individual Giving*, participants step through a practical toolkit that offers tangible next steps that can be applied immediately to bring your fundraising operation to the next level.

This virtual training experience provides nonprofit organizations with a multi-faceted roadmap for establishing an optimal infrastructure for maximizing the tremendous opportunity that individual giving represents. Participants will work together with colleagues to discover hands-on, tactical skills to help you fulfill your mission through robust philanthropic support.

Experience this dynamic, highly interactive virtual training from the comfort of your own home or the privacy of your office. Walk away with a toolkit filled with essential development process concepts that will pave your way to success in individual giving fundraising. Both the knowledge shared by our accomplished facilitators and the invigorating conversations with your fellow participants will prime you for success in fostering donor-centric fundraising at your organization.

Who Should Attend?*

- Executive directors
- Development directors
- Other key executives interested in expanding their individual giving capacity

*We recommend teams attend together to maximize the opportunity for application

What Will I Gain?

After the workshop, you will be able to:

- Recognize the fundraising activities with the greatest return on investment.
- Assess your organization's philanthropic health based on the six key factors for individual giving success.
- Create appropriate, realistic roles for organizational stakeholders in the culture of philanthropy.
- Offer engagement opportunities and refer potential contributors.
- Recognize the factors of ask readiness and craft and deliver an effective ask.
- Show the impact of past contributions in a way that drives lasting support.

What Can I Expect?

Designed to accommodate your schedule, this workshop is divided into **three 3-hour sessions** over a one-week period.

Unlike other virtual training, this is not a pre-recorded webinar that you simply watch on-demand. Instead, our facilitators will actively engage you from start to finish through lively large- and small-group discussions, video case studies, activities based on scenarios commonly encountered by nonprofits, and opportunities to plan strategy for achieving success in your important work.

Our workshops are best experienced using the most recent Zoom™ app on a strong, consistent internet connection. Because of the interactive nature of the training, please plan to use a headset or earbuds with a microphone and/or speakers and a keyboard.

Can I Earn CFRE Points?

Completion of *Transforming Your Organization with Individual Giving* is applicable for CFRE points. Contact us for more information.

What Topics Will Be Covered?

The workshop syllabus appears below.

Introduction

An overview of Advancement Resources' history and research, current trends in philanthropy, and a discussion of what's possible through philanthropy and the obstacles that sometimes stand in the way.

The Case for Individual Giving

A discussion of the pipeline-generating activities that nonprofits use and a tool for better understanding their function in a healthy individual giving strategy.

Key Factors for Individual Giving Success

An introduction to the six-part Nonprofit Action Plan booklet and the six factors for individual giving success:

1. Individual Giving Mindset and Opportunities
2. Dedicated Individual Giving Staff
3. Data-Driven Prioritization
4. Strategic Involvement of Board/Volunteers
5. Strategic Approach to Events
6. Meaningful Return on Philanthropic Investment

Individual Giving Mindset and Opportunities

A discussion of perspectives on money and wealth, with real-world application as organizational partners work together to create examples of individual giving opportunities that resonate at various giving levels.

People Dedicated to Individual Giving

An exploration of keys to creating a culture and appropriate roles for team members. Participants also gain skills in key tactical areas, including assessing ask readiness and making a successful ask.

Data-Driven Prioritization

A second look at pipeline-generating activities, with a focus on engagement for givers of all levels, including Annual Giving, Sustainer Giving, Mid-level Giving, Major Giving, Principal Giving, Event Giving, Planned Giving, and Volunteerism. Participants also apply tools for organizing their own donor portfolios optimally.

Strategic Involvement of Key Volunteers

An overview of roles of key volunteers, with tools for helping them perform their roles optimally, including sharing the vision and referring potential donors and volunteers.

Strategic Approach to Events

An opportunity to share and learn from other organizations' event strategies and how these can contribute optimally to pipeline building.

Meaningful Return on Philanthropic Investment (ROPI)

An exploration of the three key factors of ROPI and a discussion of stewardship ideas for all levels of individual giving. Participants also have the opportunity to share their own stewardship successes and lessons.

Action Plan

An opportunity to carry the success forward through the creation of a 30-day action plan based on three SMART goals.