

Fundraising Training Agenda September 2013 pilot training

Fundraising Program Goals

1. Help groups develop and successfully implement a fall fundraising campaign – one that’s connected to medium and long-term fundraising goals
2. Lay out a clear step-by-step methodology they can use/adapt for their organizational capacity and fundraising needs
3. Build an internalized understanding among participants of the elements of an integrated fundraising approach and how to design an integrated fundraising campaign
4. Identify best practices specific to data collection and data management with a particular emphasis on how to approach each with an integration mindset
5. Help groups build the concrete skills they need to use PowerBase effectively as a tool to support their fundraising campaign
6. Identify the key online and offline tools to use for an integrated fundraising campaign, and how to utilize each for maximum effect for the overall campaign

Tuesday, September 24th

9:00-9:45

Welcome, intros, icebreakers...

- What we’ll be covering in this training
- Agenda review
- Introduce fundraising game/exercise

9:45-10:10

Integrated Fundraising:

- What it is
- Why it matters
- How it works

10:10-10:30

Why *donor* fundraising matters:

- Review the elements of good individual donor fundraising campaigns

10:30-10:50

Small group discussion: What are you doing now/how’s it working?

10:50-11:00

Break

11:00-11:15

Why data and data management are the cornerstone for successful fundraising

11:15-11:40

Small group exercise: What information do we need to do our work?

- 11:40-12:00** **Case study: How Puget Sound Sage established a culture of data collection and database use**
- 12:00-12:30** **Fundraising Bingo**
- 12:30-1:15** **Lunch**
Gallery walk
- 1:15-1:30** **Overview: The new world of fundraising**
Given the online world, what's the same, what's different?
- 1:30-2:30** **Fundraising case studies: presentations of two fundraising campaigns**
- 2:30-3:15** **How to make your e-outreach more successful**
- 3:15-3:30** **Break**
- 3:30-4:15** **Discuss the 'essential' online toolset and best practices/uses for each tool**
- 4:15-5:00** **Introducing the Fundraising Dashboard**
- Why it matters? What are the most important elements?
 - Introducing the new PowerBase fundraising dashboard

Wednesday, September 25th

9:00-10:00	Fundraising case study
10:00-10:20	Identifying, assessing and categorizing potential donors: What do we need to know about potential donors and how do we get it <ul style="list-style-type: none">• Who's in our universe?• What do we know about them?• Where do they fit on the donor pyramid?• How do we reach them?
10:20-10:35	Break
10:35-11:05	Where Data Lives
11:05-11:35	Reports I: Potential Donors What information do you need and how do you get it? <ul style="list-style-type: none">• Specifically, what reports do you need to create and why• How do you get them/what do they look like in PB
11:35-12:05	Donor report exercises
12:05-12:30	Worktime <ul style="list-style-type: none">• Work on fundraising plans, <i>or</i>• Continue hands-on report creation
12:30-1:30	Working lunch in discussion groups
1:30-2:00	Reports II: Email tracking/analytics
2:00-2:30	Reports III: Campaign Management
2:30-3:00	Reports IV: Campaign Evaluation
3:00-3:15	Break
3:15-3:20	Review the agenda for Thursday
3:20-4:15	Worktime: Fundraising planning
4:15-4:45	Small groups: Share fundraising plans with another group
4:45-5:00	Day-end evaluation

Thursday, September 26th

PowerBase sessions:

- 9:00-9:15** Introduction to PowerBase sessions
- 9:15-10:00** PowerBase mass email and templates
- 10:00-10:45** PhoneBank Survey/Campaign
- 10:45-11:00** Break
- 11:00-11:45** Event Turnout for fundraising/phonecalls
- 11:45-12:30** Techniques for managing Phonebank surveys and for Event turnout
- 12:30-1:15** Lunch
- 1:15-2:15** Examples of online Personal Campaign Pages, Contribution Pages, and Event pages
- Participants also share what they've done
- 2:15-2:45** Profiles for online events
- 2:45-3:15** Group's choice: creating or editing Personal Campaign Pages, Contribution Pages, or Event pages with registration fees

Fundraising planning track options: consulting time with resource team

- Feedback on email templates
- Fine-tuning your fundraising plans
- Building your fundraising team
- Creating multi-channel campaigns
- Developing a training and skills-building plan
- Identifying major donors creating a major donor campaign plan

[These options can be scheduled throughout the day with resource team members to suit the specific needs of individuals and/or organizations.]

- 3:15-4:00** Participant presentations
- 4:00-4:15** Report on 'fundraising' efforts
- 4:15-4:45** Training evaluation
- 4:45** Head for home