Course Schedule 2020 - 2021

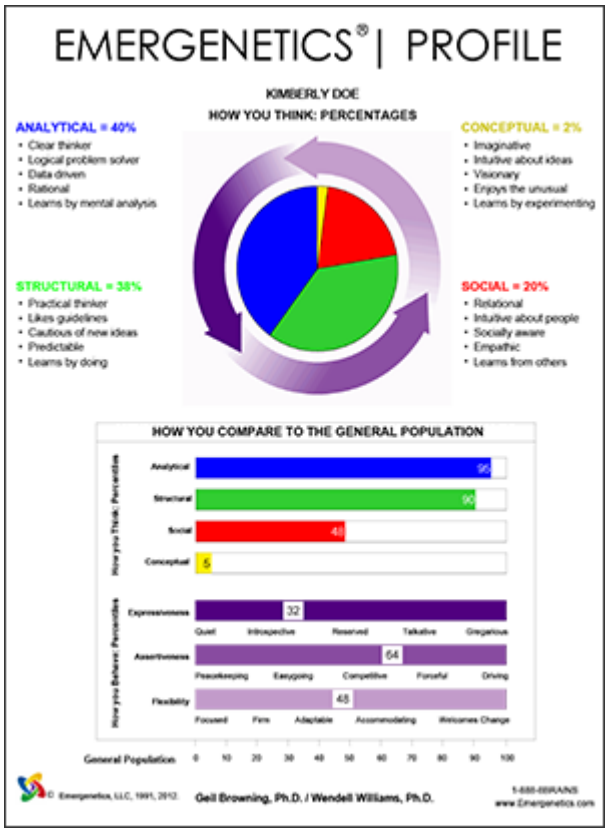
September 16, 2020 | 9:30 – 11:30am & 2:00 – 4:00pm

Intro to Leadership featuring Emergenetics

Leadership led by Lori Zahn, President, Perceptive Leaders

Participants will use Emergenetics® and Emotional Intelligence as tools to help us explore this topic. The Emotional Intelligence self-assessment instrument will help us evaluate our current level of emotional intelligence while Emergenetics® will help reveal how our natured and nurtured selves show up in the workplace. As the Emergenetics® website best explains, "Emergenetics® is the merging of two ideas - our behavior emerging from our life experiences and our genetic traits." About Emergenetics

Emergenetics is a simpler, easier way to understand people. Emergenetics tools and solutions transform the ways employees, teams, and companies work by providing thinking and behavioral insights that increase efficiency, improve communication, and ultimately bring results. From hiring candidates to developing individuals and facilitating teamwork, everything is built on robust psychometric research to maximize human performance.



Sample Report Explained:

Kimberly is a Blue/Green Thinker in the 1/3rd of Expressiveness, 2/3rd of Assertiveness and 2/3rd of Flexibility. This tells us that Kimberly probably likes details and looking at things very logically. She will generally push her ideas ahead although she may not always speak up. She can thrive in a fast-changing or steady environment.

A key element of the Emergenetics Profile is the thinking pie chart. This chart shows what is going on inside a person's head. It also indicates which Thinking Attributes are preferences. Our research has shown that any portion of the pie that is 23% or larger indicates a preference. The pie chart also is a quick visual guide for how you or others will approach their work and life

Objectives and Outcomes:

- Greater self-awareness and exploration through the Emergenetics® and Emotional Intelligence tools.

Friday, October 2, 2020

Leadership

Dan Reed, Founder and CEO, SEED Fundraisers

Dan will introduce a vision for fundraising, the concept and dimensions of leadership, an honest discussion on resiliency, explore "leading from where you are" and managing one's career.

Objectives and Outcomes:

- How to leverage the intrinsic value of fundraising rather than always defining importance through dollars raised.
- To understand the dimensions of effective leadership - "leading from where you are" and will weave in "where you want to go."

9:30 – 11:30am & 1:30 – 3:30pm

I. Personal Leadership
   a. Why we start with the self
   b. Leadership square
   c. Rhythms of self-discovery and self-care

II. A Vision for the Fundraiser
   a. Articulating our vocation
   b. The fundraiser's role in society
   c. Three postures between fundraiser and donor

III. Leading from where you are
   a. Leading as a non-anxious presence in a time of chronic anxiety
   b. Opportunities to lead: project/people/ideas

Friday, November 6, 2020

Development Relationships & Culture: The "Why" of our work (9am-12pm)

Scott Arthur, Vice Chancellor for Advancement, University of Colorado Anschutz Medical Campus

Understanding the "why" of our work will inform "how" we approach it. Benefactors give to change the world and we as development professionals come to work each day for the same reason. We will discuss how to change hearts and minds, both within your organization and with your donors/stakeholders.

Objectives and Outcomes:

To understand:

- Donor-centered cultivation, solicitation, and stewardship from an abundance, rather than scarcity, standpoint.
- Organizational culture/culture of fundraising team.
- Co-creating philanthropic visions to help benefactors realize their dreams and your organizations' aspirations.

- How to consider yourself, your authority in your environment, and how to use those things with key stakeholders to grow their confidence in you.
- The shift from needs based to vision based fundraising, framing visionary narrative
- Cultural leadership, what we look for in staff, manage up, talent management.

Discovery Visits (1pm-3pm)
Martine Hyland, Philanthropy Director, Children's Hospital Colorado Foundation with featured alum, Lauren Wise, Philanthropic Advisor, CU Anschutz

Have you ever found yourself wondering "How do I most effectively get that first visit?", "How do I prepare to meet a donor prospect for the first time?", or "I got a visit, now what do I say and what do I listen for?" Proper discovery and qualification work can save time and accelerate our best donor relationships. Learn effective tactics to qualify (or disqualify) donor prospects based on discovery calls and visits, and improve your ability to evaluate and strengthen your donor portfolio from the starting line.

Objectives and Outcomes

- Acquire techniques for effectively setting and preparing for discovery visits
- Gain insights on what to look and listen for during discovery visits
- Hear outcomes of real-life discovery visits

Participants will learn:
- Key phrases and qualifying questions for discovery visits
- A five-step process to qualify/disqualify prospects
- Learn when to disqualify using the disqualification checklist

Friday, December 4, 2020
Development Plan & Motivating a Team (9am-3pm)
Christy Clay, Strategic Planning & Organizational Effectiveness Facilitator, and Jen Darling, President & CEO Children's Hospital Colorado Foundation

What is a development plan? Learn how to develop, execute and interpret results for future planning. Additional topics may be covered that round out the session on looking at the big picture and how to accomplish the tasks necessary for reaching the big goals.

Objectives and Outcomes
To understand:
- The fundamentals of a strong development plan, including: strategic planning
- Tools and traits of a strong development office
- Institutional readiness
- The role of Organizational staff and key stakeholders

Participants will learn how to:
- Build and execute a plan
- Carve out time to be strategic/prioritize

- Consider metrics, staffing, bringing people back on track, what works, organizational staffing, step into scenarios for expansion and subtraction, culture of benefits and balance, flexibility

Featured Capstone Presentations

These will take place as examples for the current class. Date(s) tba.

Friday, January 29, 2021 (possibly on campus)

Major Gifts (9am-1:45pm)

Patrick Gaines, Senior Advisor, MPW Strategies, and Matt Wasserman, Founder & CEO, MPW Strategies

This session will reveal both the art and the science of major gifts fundraising. Participants will learn about five best practices that are critical for qualifying and engaging the most likely major gift donors and creating an internal infrastructure for major giving efforts to thrive. Participants will also take part in role-playing sessions related to qualification and discovery, and making the ask. Finally, the session leaders will share their experiences in creating and maintaining a major gift program in a variety of settings.

Objectives and Outcomes:

- Understanding the major giving donor engagement cycle
- Creating a major giving story/impact statement
- Portfolio & pipeline development
- Volunteer and leadership engagement in major giving
- Culture of philanthropy development

Donor Stewardship (2 – 4pm)

Keri Kallaway, Director, Donor Relations, Children's Hospital Colorado Foundation with featured alum Maggie McHenry, Director of Development, Florence Crittenton Services of Colorado

Stewardship is a critical element of the donor lifecycle and greatly impacts donor retention and increased giving – stewardship is cultivation of the next gift! In this course you will learn about the major components of a donor relations and stewardship and the breakdown of the art and science of a successful program.

Objectives and Outcomes:

- Learn the fundamentals of Donor Relations and Stewardship
- What does donor-centric stewardship look like?
- Discuss tracking and metrics – how do you know you are doing a good job?
- Learn how to implement strategies and tactics in small or large shops
- Review case study and examples

Friday, February 26, 2021

The Art and Science of Planned Giving

Gordon Smith, Associate Vice President of Development, Planned Giving, National Jewish Health
Scott Lumpkin, Principal, Scott R. Lumpkin & Associates

Planned giving is a critical aspect of development for most organizations yet for so many fundraisers it remains elusive and confusing. Our hope is to dispel much of the confusion and to help students gain a fundamental understanding of planned giving. In addition to explaining some of the basics, we hope to share what a typical planned gift donor looks like and how they differ from many other donors. We will touch on the important role of taxes in planned giving and review the different assets and vehicles that are typically used to create a planned gift. We will discuss the process for cultivating, soliciting and closing planned gifts and will review and practice various scenarios in each of these areas.

Objectives and Outcomes:

To understand:

- the basic planned giving functions in development
- how to identify planned giving prospects
- different gift assets and gift plans

To become familiar with:

- "blended gifts" and their importance in today's giving environment
- different processes for cultivating, soliciting and closing planned gifts
- the "soft" skills necessary to be successful in gift planning

Schedule:

9am - noon:	The Science
1 – 2:00pm:	Small Shop Perspective
2 – 4:00pm:	The Art/Role Play

Spring 2021

Spring Session/Luncheon in Partnership with AFP Colorado Chapter

ILD is thrilled to partner with AFP again this year to offer the spring session on major gifts. Look for more details to follow.

Friday March 21, 2021

Behind the Scenes: Understanding Financials (9am-12pm)

Peter Konrad, Ed.D., CPA, Philanthropic Advisor, Konrad Consulting

The session will focus on better understanding nonprofit financial statements in order to communicate this important facet with donors. The class will review numerous nonprofit financial statements in order to better understand the underlying accounting principles. Class will review sample statements connected with grant applications to analyze the projects likelihood of funding. Look for more details about this session to follow soon.

Objectives and Outcomes:

- Introduction to and discuss of key accounting terms.
- Learn how to read and analyze financial statements by reviewing examples.
- Overview of key nonprofit accounting best practices.

Capital Campaigns and Endowment Funds (1-4pm)
Vickie M. Wilson, Ph.D., Executive Director, Friends of The Haven and Rebecca Olchawa Barker, Director of Philanthropic Services, Community First Foundation

A capital campaign is about "building for now," while an endowment fund is about "providing for the future." During this class presentation, Vickie will discuss the indicators for capital campaign readiness, how to decide if a campaign consultant is needed, what a feasibility study offers and how to develop a winning case statement. Rebecca will walk you through readiness factors for an endowment, benefits of endowment, and how to identify prospects who can help set organizations on the path of long-term sustainability. Vickie and Rebecca will also cover the differences between an endowment and capital campaigns and the use of a blended gift model to include endowment in your conversations with donors.

Objectives and Outcomes:

- Determine an organization's capital campaign readiness
- Decide on a campaign consultant or not
- Review a feasibility study
- Understand the difference between "quiet" and "public" phase
- Develop a winning campaign case statement
- Create a gift range chart/pyramid
- Define what is an endowment
- Understand endowment readiness factors
- Discuss the potential benefits of endowment
- Understand who your best prospects are for endowment giving
- Consider strategies to build endowment
- Describe the value of blended gifts

Friday, April 30, 2020

Morning | A Comprehensive Look at Ethics in Fundraising

Sarah Harrison, Vice President of Philanthropic Services, The Denver Foundation and Christiano Sosa, Executive Director, the Arc of Colorado

The ethics session introduces the definition and history of Ethics and explores applications of ethical decision-making to fund development and nonprofit management. Participants review case studies and learn from outside speakers on ethical dilemmas that crop up regularly for all of us in our daily work.

Objectives and Outcomes:

- Definition and history of ethics.
- Applications of ethical decision-making and nonprofit management, through case studies.
- Insight into the funders perspective.
- Review of the AFP Code of Ethical Principles and Standards and Donor Bill of Rights.

Return to Leadership (Afternoon)
Dan Reed, Co-Founder and CEO, SEED Fundraisers

This session will provide opportunity for reflections on the exploration of emotional intelligence assessment, and ways to carry the learning forward. Topics will include: managing your career, personal leadership, an intentional career (with panel discussion) and reclaiming the rhythms of the day (with panel discussion).

Objectives and Outcomes:

- Identify how you will carry your learning forward.
- Learn how you can continue to build on your Emotional Intelligence to help you become a stronger leader.
- Reflect on what you've learned about yourself and your leadership style through the lens of Emergenetics® and EQ profiles.

Emergenetics® and EQ profiles.

- Career management -- Carrying resiliency forward.

Faculty Bios

Scott Arthur
Scott brings 22 years of experience as a fundraising leader at major medical institutions and nonprofits. Previously, Arthur was the vice president of constituent giving at the Nationwide Children's Hospital Foundation in Columbus, Ohio, the fourth-largest children's hospital in the United States, where he led a major-giving program that increased giving nearly 400 percent in two years.

Prior to that, Scott was a major gift officer for Mayo Clinic in Rochester Minnesota, perennially ranked among the top three medical centers in the United States. He individually raised more than $11.2 million for the Mayo Clinic over 3 years.

At CU, Scott leads a team of 58 fundraisers and support staff, with an annual goal exceeding $200 million. Since his tenure at CU, the Anschutz team has worked with inspired benefactors to triple philanthropy focusing on benefactor-centric, inquiry-driven, relationship-based, first-in-class practice. His expertise lies in how to create more with less, using office values and culture to produce fundraising results.