

# DLC Workshops

## Building, Implementing and Sustaining a Major Gifts Program

Securing a major gift is no accident. It is a strategic process, implemented over a period of time, that culminates with both the donor and the charity reaping significant benefits. Did you know that 80-90% of philanthropic revenue comes from only 10-20% of the donors? Did you also know that the majority of a development officer's time is spent on the tactics that raise the *fewest* dollars? These facts lead Board members to inquire why individuals of high net worth are not giving to the organization only to discover that the majority of development offices are focused on tactics and not donors. Once you shift that paradigm you begin to experience the results that can only come from diligently cultivating donors. Take this workshop and discover how to empower a donor's ability to significantly impact their passionate cause. Find significant financial support over the long-term to build capacity that achieves your vision and goals. Develop a richer depth of understanding and a greater comfort level by reviewing concrete examples of how to execute the program. This program is designed for development officers, executive directors and board members interested in learning how to move donors from casual contributors to significant supporters.

### Learning Objectives:

By the end of this program you will be able to:

- ❑ Identify and qualify major donor prospects.
- ❑ Establish cultivation and stewardship activities to deepen the donor relationship
- ❑ Engage Board members meaningfully and appropriately in the process
- ❑ Prepare a strategy for each donor that will result in a major gift
- ❑ Conduct meaningful meetings with donors that result in ongoing support
- ❑ Implement a "moves management system" to advance the program and measure results

## Is There A Campaign In Your Future?

Major new initiatives, objectives of the strategic plan, or renovation of facilities cannot be accomplished without a significant infusion of capital. Campaigns are the "Holy Grail" of fundraising. They are exciting, intimidating, and overwhelming all at once! Yet, they are the most effective way of raising urgent funds for a compelling need in a very small amount of time. The most effective way of raising significant capital in a short period of time is "the capital campaign". It works because it is so highly defined, meticulously organized, structured, methodical, and controlled. If you are considering a campaign in within the next year, take this workshop and learn about the critical elements necessary prior to launching a campaign. Discover the key success factors that allow campaigns to overachieve their goals. Learn the difference between successful and unsuccessful campaigns and why some succeed and others not. Bring your questions and unique circumstances to the workshop and get some new ideas. This presentation will benefit Board Chairs and Board members, CEO's, Executive Directors, Chief Development Officers, Planning Officers and Financial Officers who will learn how to plan early and effectively to accomplish major initiatives that cannot be funded through routine fundraising efforts or operations.

### Learning Objectives:

by the end of this program you will be able to:

- ❑ Describe the characteristics of a viable fundraising campaign
- ❑ Illustrate/diagram your future successful campaign structure
- ❑ Generate multiple ideas to consider in future fundraising efforts and campaigns
- ❑ Examine case studies to create a base of knowledge
- ❑ Develop an actionable planning structure to support successful fundraisers

## Integrate Events Effectively into Your Fundraising Plan

Too often not-for-profit organizations are not prepared to raise money at their fund-raising events. Special events are the staple of most fundraising programs, require enormous amounts of time and energy, and are often underutilized for their real fundraising potential. What is your organization's fundraising comfort level? Do your events inspire people to give to your cause? Unfortunately, donors can leave disappointed because they don't know how to make a difference. Events can be a vital part of your development efforts if well-planned, exceptionally executed, and integrated effectively. This workshop is designed to help organizations create a signature event and includes elements relevant for all levels of experience. It provides a strong foundation for those relatively new to the field and also addresses how to leverage a prominent fundraising tool to build a strong development program.

### Learning Objectives:

by the end of this program you will be able to:

- ❑ Effectively raise money in advance of the event by engaging sponsors, getting the right people in the room
- ❑ Identify your target audience and brand your event to create a buzz before people even attend
- ❑ Structure your event to raise the optimum number of dollars at the event
- ❑ Present a riveting and compelling program that will position your organization as the charity of choice.
- ❑ Retain donors once the event is over
- ❑ Discover strategies to lay the foundation immediately for your next event and transition the donors at your event into long-term donors for your organization
- ❑ Learn to manage your logistics so that people leave with a positive and generous feeling



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## Governance

### Its More Than Showing Up

Who do you choose to recruit to your board? What is the process of orienting a new board member? How do you conduct the business of the board? Most non-profits are complex and a new board member can feel overwhelmed at his or her first meeting. Does your organization have very clear guidelines on appropriate and inappropriate behavior? This workshop is designed to help board members understand the infrastructure necessary to have a high functioning, high performing board. Designed for large or small boards, this workshop focuses on the boards' work and the time needed to ensure a boards' due diligence. We recommend that board members new and old, as well as senior level staff (e.g., Executive Directors, Presidents, CEO's) participate together to achieve optimum benefit.

#### Learning Objectives:

by the end of this program you will be able to:

- ❑ Identify the skills and expertise is needed to establishing a procedure for selecting potential board members and establishing clear expectations from the very first interaction.
- ❑ Learn how to effectively "onboard" new members to make their first meeting far more productive.
- ❑ Evaluate current board meeting structures by completing a gap analysis
- ❑ Design an effective committee structure and use those committees to accomplish a significant amount of the work, leaving board meetings to addressing critical issues and ensuring that major initiatives are moving forward.
- ❑ Clearly define the differences between governance and management and the board member's role is in relation to each

## Ready - Fire - Aim?

### Preparing Fund-Raising Plans That Work

Will 2014 be as tenuous an environment as in the past? We believe that it is critical for every not-for-profit organization to have an effective fund-raising plan that impels donors to be generous and loyal. Armed with the facts, we delve together into fund-raising strategies and look at how to prepare a fund-raising plan that can work for you regardless of whether you are a start-up or an experienced development office. This workshop takes a novel approach to developing your plan. Learn how to analyze your current fund-raising initiatives and better understand individual donors' giving practices. Discover where your development office is in the giving cycle and how you can use that information to strategically build support. Using hands-on methods and real examples develop a donor-focused fund-raising plan that is realistic, strategic, and actionable. Our program includes elements relevant to people at all levels in your organization. It provides a strong foundation for those new to the field and fine tunes the perceptions and understandings of veterans. Join us and gain insight and skill by addressing the challenging issues affecting non-profit philanthropy programs today.

#### Learning Objectives:

by the end of this program you will learn how to:

- ❑ Determine the hidden treasures in your own database
- ❑ Anticipate Board members questions before they even ask and have the answers ready to facilitate engagement
- ❑ Develop meaningful and measurable relationships with your donors
- ❑ Decrease the stress of activity jumping by designing tactical models to follow
- ❑ Create short-term and long-term plans that are linked to fiscal goals.

## Donor Retention

### The Core of a Healthy Development Program

How many times have we heard or said that good development work is about building relation-ships? Why is it so difficult for non-profits to keep their donors from one year to the next? Did you know that in 2009 and 2010, only 43% of donors renewed their contribution? Did you know that for new donors - the percentage was even lower - only 27%?

An effective development program, and a strong annual giving program is predicated on renewing donor support every year - asking donors to upgrade and increasing philanthropic giving to build a strong, sustainable program. Join our workshop and learn new ideas that focus on donor retention, build a stewardship program and keep your donors tied to your organization. Discover how to reach out to donors and hold on to a larger percentage before they lapse. Learn how to raise more money by mining your donor database. This workshop includes information and learning experiences relevant to people at all levels in your organization. It provides a strong foundation for those new to the field as well as refining the knowledge and skills of veterans.

#### Learning Objectives:

by the end of this program you will be able to:

- ❑ Identify the major factors contributing to donor attrition
- ❑ Describe the ideal relationship with donors and strategies for maintaining one
- ❑ Conduct a gap analysis to analyze your current donor retention activities
- ❑ Design short-term and long-term strategies and activities that advance new retention goals
- ❑ Select key measures for documenting progress in donor retention



# DLC Workshops

## How to Build Your Organization's Dashboard

Does your Board require more relevant information in the future? Our workshop will assist you, your staff, and board members discover the power of dashboards. Help your Board hold better discussions, have more efficient meetings, and make better decisions. Teach your staff how to gather data proactively in preparation for meaningful presentations at the board meeting. Learn how to uncover the relevant information in your income statements and balance sheets. This program is ideal for Chief Financial Officers, Budget Directors, Department Leaders, and Board members.

### Learning Objectives:

by the end of this program you will be able to:

- Create dashboards and present the information in an efficient, meaningful and concise manner
- Build charts, tables, graphs representing key financial benchmarks such as money raised and money saved
- Evaluate the board response and re-calibrate the dashboard for continuous improvement to each

## Take Back Your 990

Did you know as a Board member you are supposed to review your 990 before it goes to the IRS? Did you realize that the IRS sends all 990's to GuideStar for review by all of your current and prospective donors? Learn how to prepare information and data for the 990 form by establishing criteria for data inclusion. Discover how to organize the information for the accountant (if they are preparing the form) or other responsible staff. Review the assumptions used to allocate expenses by function to see if they are reasonable. Create the acceptable list of marketing information for mission and program accomplishments for potential donors.

### Learning Objectives:

by the end of this program you will be able to:

- Review the 990 format and identify data gaps
- Describe your organizations timeline and process for compiling 990 data
- Establish a committee of staff and board members to review and critique the 990 presentation
- Field test the presentation to assure readability and understanding.

## Financial Scenario Planning

Do you know the power of financial scenarios? This program orients you to the detailed analysis of forecasting the impact of financial changes. What financial scenario planning can do for your organization is significant. Take this workshop and learn what key questions to ask when examining your budgets. Explore and calculate the impact of economic changes on your budget. Be prepared to manage the gaps in your budget created by unforeseen emergencies such as government shut downs and shifts in the economy. Project ahead and see what a 20% reduction in resources does to your operation and trace the changes through the entire organization. This program is ideal for Chief Financial Officers, Budget Directors, Department Leaders, and Board members.

### Learning Objectives:

by the end of this program you will be able to:

- Identify the methods for creating different scenario models
- Conduct a line by line budget analysis to determine impact on programs
- Compute the gaps and evaluate options for management and board
- Establish evaluative criteria for reducing the gap or use savings (if available)
- Craft policies that create contingency (i.e., rainy day) funds

## Take the Worry out of Cash Flow

Are you worried about making your payroll month to month? Do you have enough money to pay three months of bills? This program orients you to the daily activity of your checkbook balance and management of dollars. Join us in this workshop to reveal your priorities over the next few months. Reconsider how you will cover expenses until government grants are received by learning how to map your monthly receipts and disbursements. Our program challenges your assumptions on timing of receipts and assists you to identify the funds available that can smooth out the cash flow. This program is ideal for Chief Financial Officers, Budget Directors, Department Leaders, and Board members.

### Learning Objectives:

by the end of this program you will be able to:

- Analyze how grants and other payers affect your cash flow
- Create plans that prioritize the most important elements of your budget
- Review the policies that guide internal borrowing and replacement of funds
- Craft a six month map that projects your organization's short falls in cash flow
- Establish evaluative criteria for delays or speed-ups in actionable activities.



# DLC Workshops

## Basic Media Presentation Training

Program Description: Does your nonprofit need visibility in the community? How are you positioned to work with the local or regional media? Can you differentiate the key rules of engagement? Discover how to craft a specific plan for meeting with representatives of the media that will minimize any stress or difficulty. Learn the difference between key actions such “off the record” and “not for attribution”. Through thoughtful presentations, discussion, and on-the-spot analysis, develop an increased familiarity with interaction techniques. Get to know the press and yourself in this interactive workshop.

### Learning Objectives

By the end of this program you will be able to:

- Determine the core messages/facts of story that you want to tell and craft a message for the press using the rules of engagement
- Understand how to avoid the pitfalls of casual exchange
- Develop your talking points for a media audience
- Utilize your rights in an interview to determine time, place, length of interview, right to terminate the interview, challenge the reporter’s facts.
- Identify the traps and how to get out of them

## Advanced Media Presentation Training

How are you positioned to work with the local or regional media? Are you conversant with the unwritten rules of journalism? Learn the techniques that insure effective meetings with representatives of the media. Discover the differences between key terms such as “off the record” and “not for attribution”. Through presentations, discussions, and on-the-spot analysis, you will improve your interaction techniques and competencies. Get to know the press, your rights (i.e., time, place, length of interview, right to terminate, challenging reporter’s facts), and yourself in this interactive workshop. This program is ideal for smaller nonprofits with limited staff and budget.

### Learning Objectives:

by the end of this program you will be able to:

- Determine priority messages and facts before an interview
- Prepare for effective delivery of your messages to a reporter
- Manage standard rules of engagement with press staff
- Analyze pitfalls of casual media exchange during interviews
- Utilize your rights in an interview to determine time, place, length of interview, right to terminate the interview, challenge the reporter’s facts.
- Manage the strategies for getting out of media traps

## Changing Environments - Effective Policy Change Process

Rapid change is the new normal for all nonprofit organizations. The admonition “past success does not secure the future” has motivated Board and staff leadership to systematically reflect-on, and re-consider the policies that drive the mission of the organization. This workshop provides your team the opportunity to critique, craft, and refine your policy systems. Discover alternative methods that foster new policy considerations and systematically impact new directions.

### Learning Objectives

By the end of this workshop you will be able to

- Identify the major policies that drive mission achievement
- Describe the data that supports thoughtful discussion and decision-making
- Map your current process of developing policies and devise a process for changing policies that will positively impact the organizations products and services
- Design a short-term and long-term change matrix that includes benefits and effects

## Changing Times: Preparing to Manage Transitions and Innovation

Recurring forces of change requires nonprofit organizations to be vigilant about the impact of demographic, technological, social, and economic factors. These factors alter the way we view the delivery of our programs and services, and further affect our back-office operations. How well your non-profit organization managed its past transitions, and how well it manages future transitions may be a function of board and staff preparedness and engagement. In this workshop your team will create a mirror reflection of the factors most affecting your organization today and anticipated in the future. Join us for this 3 hour hands-on program that has take-aways you can use!

### Learning Objectives

By the end of this workshop you will be able to

- Identify driving factors of change that are affecting your organization
- Discuss the effectiveness of the staff and board responses to changes
- Determine the efficacy of your change management systems and transition processes
- Estimate the impact of current and future transition solutions



# DLC Workshops

## Mapping Impact: Process Improvements With Everyone In Mind

Are you the person who thinks about how well your “organizational engine” is working? In every organization there are opportunities to streamline processes and find new efficiencies. Leaders do not often make this a high priority and when they do it does not always map out the impact on others in the organization. In this workshop you will create a mapping tool for understanding the effect of changes under consideration. Learn how to critique and simplify your forms to mirror the process maps you create. Bring measurable results home to your organization for their future consideration.

### Learning Objectives

By the end of this program you will be able to:

- ❑ Identify and critique three processes in need of change
- ❑ Analyze the strength of process pathways between departments
- ❑ Explore solutions that benefit all stakeholders and improve the process
- ❑ Create short-term and long-term action plans that bring forward proposed change, timelines, and deliverables.

## Organizational Life Cycles

Author Susan K. Stevens, Ph.D. distinguishes seven stages of development that non-profit organizations transition through as they evolve, build capacity, and adapt to changing conditions. According to Stevens, organizational lifecycles provide a structure and a starting point for diagnosing your potential to develop new programs and services or to expand existing programs and services to new populations. In this workshop you will learn about the non-profit organization lifecycles and how they may help you refine your growth strategies. In addition, a model of lifecycle transitions can help staff and board members alike to establish realistic expectations and identify behaviors that may be out-of-synch with expectations. Sign-up for this workshop and expand your management insights and abilities by learning how transitions through non-profit organizational lifecycles effects your decisions.

### Learning Objectives:

by the end of this program you will be able to:

- ❑ Describe the non-profit organizational lifecycle model
- ❑ Review of case studies and reflect on the value of lifecycle stages
- ❑ Diagnose your organization using a system of Lifecycle analysis
- ❑ Draft organizational goals supported by lifecycle analysis results
- ❑ Examine the links among elements of the non-profit's operations

## Outcome Measures and Success Stories

The “data-base age” is here to stay and the implications for staff, board members, and volunteers are significant. What information is important to your nonprofit and which data will you need to tell your story in the future? Who will analyze the information and get it ready for your stakeholders? Sign-up for this workshop and determine your level of preparedness. Determine if your staff needs training or should you subcontract with a consultant? Discuss your current capabilities and what you may need in the future. This timely workshop supports your efforts to document the success stories of your nonprofit that will leverage new capacity.

### Learning Objectives:

By the end of this workshop you will be able to:

- ❑ Describe your ideal database support system
- ❑ Identify the resources needed to successfully capture success stories
- ❑ Diagram the processes for managing your outcome measures
- ❑ Create a dashboard that captures your success story

## Integrating New Program Initiatives into Your Organizational Model

Non-profit organizations are never static and always changing. Some changes result from compliance initiatives with federal, state, municipal laws, national agency policy, or professional standards. Is your organization flexible enough to comply with new requirements? Will your staffing pattern or workload shift to accommodate new responsibilities? This workshop is a hands-on exploration of your non-profit's ability to comply with new initiatives. Using scenario projections, learn how to anticipate possible positive or negative effects. Bring back a useful tool to use with your team that helps in operational planning.

### Learning Objectives:

By the end of this workshop you will be able to:

- ❑ Summarize the short-term and long-term program compliance initiatives affecting your organization now and in the future
- ❑ Estimate the benefits of changes resulting from new program integration
- ❑ Construct staffing patterns and responsibility scenarios that may be useful to clients, staff, and boards upon operationalization
- ❑ Identify the measures that may be useful in creating a dashboard for staff and board members.

