

## UNO Certification in Fundraising Management Program 2024 Proposed Updated Schedule and Course Descriptions

### Orientation and Understanding the Nonprofit Sector - Thursday, January 25 and Friday, January 26

**Description:** The Orientation will provide an overview of program benefits, expectations of participants and faculty, schedule, and what to expect generally and specifically from the program. We will meet each other and start networking. We will stress the importance of networking and networking skills. A major portion of the Orientation will focus on the project and on the importance of writing to success in your career.

Understanding the Nonprofit Sector will answer the question, what is nonprofit fundraising and development? There are about as many definitions as there are nonprofits in the world. In this course, you will discover the commonalities that bind nonprofit development programs, fundraisers and philanthropists together. This course will establish foundational knowledge about the sector, define important terms and concepts, and provide you with the tools you will need to approach subsequent courses, in which you will systematically create a comprehensive development plan for you and your organization. This fundamental course is required of all students within the program and is designed to be the first course you complete.

#### **Objectives:**

- Provide a foundational understanding of the nonprofit sector, specifically the role of fundraising and philanthropy within that sector.
- Define common terms and concepts that will feature significantly and be expanded upon in subsequent courses.
- Introduce and inculcate an understanding of the ethical and legal considerations inherent to nonprofit fundraising and how these should inform and guide study and practice.
- Spark critical thinking around organizational needs and future development plans, laying groundwork for the interactive and practitioner-oriented activities of subsequent courses.

#### **Key Topics:**

- Giving Structure, who gives and who benefits
- DEI and fundraising
- Ethics and the law
- The Impact of trusts and wealth on US civil society
- Resource dependency and mission drift in relation to fundraising
- Top down v. grassroots and community centric fundraising models
- Budget and where the funds come from
- How to put together a development plan
- Psychology of why people give
- Overview of what is coming up

### Fundraising Intelligence – Thursday February 15th and Friday, February 16th Liz Clarke and Amy Turbes

**Description:** Keeping your donor pool dynamic is vital to an organization's success. To increase individual donor giving you need to better understand your donors and the impact they want to make in order to fully engage them with your organization. To do all those things well, you need to be flexible and strategic with focus on managing the right prospects.

This course will focus on identifying top prospects to your organization, how to manage them throughout the solicitation cycle and record interactions with them. We'll discuss ways to use outside research and your own internal database to support the work. Participants should leave the course able to determine the top prospects, create solicitation plans for them and have a general understanding of key data points to record in a database.

**Learning Objectives:**

- Understand the role of prospect development as strategic piece of fundraising pipeline.
- Learn how to identify prospects and create portfolios of donors and potential donors.
- Develop yearly donor solicitation plans for top prospects
- Understand database management and key data points for your constituents.

**Key Topics**

- Budget and where the funds come from
  - Putting together a development plan
  - Fundraising pipeline
  - Identifying prospects
  - Managing portfolios
  - Donor strategies and solicitation plans
  - Solicitation cycle
  - Managing donor data in database
  - Prospect research
- 
- Build a toolkit of written case statements, calls to action, and fundraising appeals that can be applied in practice to your organization's annual giving program

**Planned & Major Giving – Thursday, March 28 and Friday March 29 Hillary Nather-Dietisch**

**Description:** Attendees will learn the positive and lasting impact a major donor/gifts program has on a nonprofit organization and within the fundraising department. The course will review the necessary steps to creating a new and/or improve an existing major gifts program. Participants will review the necessary steps to creating a successful program that engages donors to the fullest in an organization.

**Learning Objectives:**

- Develop an understanding of major giving including how it can serve organizational outcomes, how major donors can influence mission drift, and how honest fundraisers should be with major donors when discussing organizational priorities.
- Participants will be able to define a major gift level for their organization and learn how to prospect for these gifts.
- Participants will learn the multitude of cultivation techniques available to customize for their organization/donor base.
- Participants will learn how to make a face-to-face solicitation as well as the cultivation and meeting strategy that needs to be in place before soliciting.
- Participants will learn the importance of stewarding and the various tools available to be successful.

- Participants will review the logistical components of a major giving program including gifts agreements, recognition and giving vehicles.
- Participants will review the basic planned giving vehicles and easy steps to creating a first-time planned giving program.

### **Key Topics:**

- Solicitation – What to say, questions to ask, contacts and visits
- Vehicles – donor advise funds
- Proposal and pitch
- Impact
- Donor motivation
- Gift agreements/negotiations
- Major gift subtle (and not so subtle) influence on organizations
- Definition of differences
- Engaging others in the ask process, when necessary
- Recognition

### **Donor Stewardship and Events – Thursday, April 25 and Friday, April 26 Emily Prauner**

**Description:** A solid stewardship and engagement plan will focus on attracting and retaining donors by fostering engagement and providing exceptional donor experiences. This course will cover basics from donor acknowledgment to technical details such as proper gift compliance protocols. In addition, it will dive into event management, both in-person and hybrid models and determine metrics to measure the success of event beyond headcount. You'll also learn tips for impact messaging to enhance your donor communications. By the end of the session, you will walk away with skills to tell the unique story of your organization in a deeper way, to help donors truly understand their impact, and to recognize and inspire them to engage in a way that is meaningful to them.

### **Learning Objectives**

- Understand the unique role of donor stewardship when it is appropriate and how to drive your organization to engage donors in a deeper way to become their top philanthropic priority.
- Identify ways to attract and retain donors by fostering engagement through events and other opportunities.
- Define specific impact messages and communication unique to your organization to deepen their connection with your organization.
- Develop appropriate recognition of donors and volunteers throughout the course of the donor journey, to strengthen them for future giving

### **Key Topics**

- Stewardship – recruitment, retention, growth
- Donor appreciation events/activities
- Acknowledgements
- Compliance
- Understanding the tax laws/guidelines
- Writing for donor Impact
- Recognition; Impact
- In-person, Virtual and Hybrid Events (both recognition and fundraising events)
- Pre and Post evaluation of Event

## **Grant Writing, Reporting & Management – Thursday, May 23 and Friday, May 24 Rosey Higgs**

**Description:** Attendees will learn the grant writing and management process start to finish; from becoming 'grants ready' to reporting to funders. This course will highlight best practices in grant research and writing, as well common pitfalls to avoid. Participants will receive tools and templates they can put to use in their own grant writing practice and have the opportunity to create a basic grant proposal.

### **Learning Objectives:**

- Participants will understand how grants influence nonprofit operations and priorities, and which grants benefit which kind of nonprofit structures and sizes.
- Participants will identify grant research tools and how to use them
- Participants will assess grant opportunities and the degree to which they are appropriate to their project &/or organization
- Participants will practice telling the story of their organization through a case statement, budget, and narrative
- Participants will create a plan to demonstrate performance of grant-funded projects through program evaluation.
- Participants will develop a system for grant tracking & reporting

### **Key Topics:**

- How to start grant writing
- Determine what grants to apply for
- Case statement
- Mission creep
- Sustainability **and desirability** of grant requirements
- Grant agreements
- Performance measures – accountability/stats
- Duplication and collaboration of services
- Writing style and budget
- Reporting the results
- ROI
- Organization of grant, researching, writing, submission, feedback, rewrite, award

## **Corporate Partnerships – Thursday, June 27 and Friday, June 28 Haley Armstrong**

**Description:** Attendees will learn the evolution of corporate social responsibility and how businesses are adapting to societal and employee needs. The course will highlight best practices in engaging employee resource groups, workplace giving campaigns and corporate match programs. Participants will be provided with templates and examples to create their own comprehensive corporate partnership plan.

### **Learning Objectives:**

- Participants will have an understanding of corporate partnerships with nonprofits, how corporate partnerships can influence nonprofit activities, and the impact on clients
- Participants will be able to recognize and proactively identify volunteer driven fundraising programs
- Participants will learn how to analyze a 990 report
- Participants will assess and put into practice multiple approaches to corporate giving

- Participants will build a workplace giving campaign

**Key Topics:**

- What is the evolution of corporate social responsibility?
- Corporate match programs
- Dollars for Doers' Program

**Annual and Sustainable Gifts: Donor retention, acquisition and upgrading – Thursday, July 25 and Friday July 26 Joel Gehringer**

**Description:** Not all of our donors will be able to give at transformative levels. However, when we bring the many together through fundraising, we can secure vital resources for our nonprofits and build a more engaged and robust community of supporters. This course will cover annual and sustainable gifts – which are often the lifeblood of nonprofit organizations. In this session, you'll learn about the many forms a robust annual giving program takes, how to develop an effective annual giving program, and what the future looks like for our fundraisers and loyal donors in the digital age.

**Learning Objectives:**

- Develop an understanding of annual giving – what it is, what it does for your organization, what it means for your donors, how it can influence organizational priorities and practices.
- Delineate the many forms that annual giving can take – direct mail and email, phone calling, social media, events and limited campaigns, face-to-face solicitation, digital efforts – and when it is most appropriate to deploy each.
- Build knowledge on how to properly segment audiences and personalize appeals in order to open intimate fundraising conversations with many via mass communication methods.
- Gain an understanding of the annual donor solicitation cycle – including awareness, education, engagement, solicitation and stewardship.

**Key Topics**

- What make annual giving unique
- Unrestricted v. restricted
- Traditional and grassroots annual giving campaigns
- Donor motivation
- How to create ask
- Audience segmentation
- Giving days - #GivingTuesday, etc.
- Traditional, online and multi social media
- How to write case statement
- Crowd funding
- Events and range of gift/donation
- Performance evaluation
- Personal solicitation
- Recognition

**Managing Volunteers Thursday, August 22 and Friday, August 23 Rosey Higgs**

**Description:** A strong volunteer engagement plan will focus on attracting and retaining volunteers to enhance the mission of your organization. This course will range from volunteer identification and recruitment to volunteer engagement. You will learn how to build a volunteer pipeline to assist with board development and how to craft a conflict-of-interest policy for

volunteers. Identifying board giving expectations and board structure will also be covered. In addition, you'll identify clear volunteer/board expectations and how to break up with a volunteer/board member who is not holding up their end of the bargain.

#### **Learning Objectives:**

- Understand the volunteers needs of your organization and how to best match them with volunteers to ensure a content volunteer focused on the true needs of the organization.
- Identify ways to attract, recruit and retain volunteers by fostering engagement through events and other opportunities.
- Determine appropriate board structure and giving requirements, as well as pipeline development for the future.
- Understand the role of volunteers and board members play in your organization and how to clearly communicate that expectation, as well as learn how to break up with a board member or volunteer who is not meeting those expectations.

#### **Key Topics**

- Board and guild members
- Everyday volunteers
- Recruitment, retention, and growth
- Board expectations – give/get commitments, structure

#### **Public Relations & Marketing – Thursday, September 26 and Friday, September 27 Haley Armstrong**

Description: Attendees will learn how to craft impactful messaging, craft an organizational identity, and manage relationships with media partners. The course will highlight best practices in public relation efforts and social media strategy. Participants will be provided with tools and templates to create a marketing plan, news release and social media scripting.

#### **Learning Objectives:**

- Participants will recognize the variety of marketing mediums and identify which their organization will utilize
- Participants will understand how portrayals of clients impacts nonprofit activities
- Participants will enhance their public speaking skills
- Participants will design their own marketing plan
- Participants will complete a news release

#### **Key Topics**

- Creating an identity
- Various marketing mediums
- Marketing and social media plan outline
- Media relation

#### **Fundraising Campaigns – Thursday, October 24 and Friday, October 25 Hillary**

**Description:** The goal of a fundraising campaign is to turn dreams in a strategic plan into realities. Campaigns are a specialized way of raising large amounts of money in a concentrated amount of time and they push organizations to think bigger and deepen relationships with donors and future donors. There are many important steps needed for a successful campaign,

this session will define the various phases of a campaign and the tools needed to be successful each step of the way from analyzing your donor pool, understanding team and volunteer roles, messaging a campaign, recognizing donors, and evaluating the work.

**Learning Objectives:**

- Understand the unique nature of campaign fundraising, when it is appropriate and how to prepare your organization for one including additional budgetary needs and expanded staff and volunteer roles.
- Define the phases of a campaign and create a realistic timeline.
- Outline the tools and resources needed including contracting with outside professional help to ensure success during each phase.
- Understand the need and components of donor pool analysis tools like feasibility studies and wealth screenings
- Define specific messages and communication for campaign support and the appropriate recognition of donors and volunteers throughout the campaign for future relationship building.

**Key Points**

- Budget and staffing
- Strategic planning
- Feasibility study internal and external
- Goal Setting – donor pyramid – general
- Wealth screening
- Messaging, Visioning, Communication for Campaign
- Recognition

**Presentations – Thursday, November 21 and Friday, November 22 (if required)**