



The Advancement Training and Coaching Program proposed reflects best practices to help development leaders identify, inform, inspire, invite, and involve donors in the envisioned mission of their school. The training is designed to strengthen general fundraising knowledge, improve processes, and build confidence. The goal is for this training to build a framework that encourages lasting relationships with donors. While this plan provides an outline for the cohort training, the one on one coaching aspect will allow for flexibility in the mentoring process so that we can focus our time together on the areas that will have the greatest benefit to you, your team, and your school.

The following proposed plan is designed to build on your school's heritage of excellence while increasing opportunities for advancement. The proposed plan will include six cohort training sessions and six one on one coaching sessions delivered over a six month time frame (January 2021 to June 2021) via virtual conferencing.

SESSION 1

Mission Driven Annual Fund Development

A healthy annual fund provides unrestricted financial resources beyond revenue gained through school tuition. Connecting your method of fundraising to your mission can improve donor engagement and sustainability. Learn the basics of developing an annual fund, identifying natural partners, and maximizing existing connection events.

SESSION 2

Advancement Infrastructure: Preparing People and Processes for Success

Building donor loyalty is foundational to a successful development effort. This requires having the right messaging, people, and processes in place, and can make the difference between raising a few thousand dollars or several million. Learn how to create strategic messaging, build an advancement office, and design plans with your donors in mind.

SESSION 3

The Art of Asking: Facing your Fears

There are many myths and misconceptions about asking for money. It is a responsibility dreaded by most, and yet it is a critical aspect of providing for the future growth of any nonprofit organization. Identify fears that may be holding you back, discover common misconceptions about fundraising for Christian Schools, and learn some of the most frequent fundraising mistakes to avoid. Gain practical knowledge by asking questions and preparing for your next donor conversation.

SESSION 4

Major Gifts and Capital Campaigns: Building Frameworks for Future Funding

Restricted donations make up the largest financial contributions to a Christian School. Focusing on major gifts will undoubtedly affect your annual fund, but it may not be what you imagine. Identify the difference between annual fund and major gift campaigns, discover when and where to engage donors for optimal results, and learn how to prepare for a successful capital campaign.

SESSION 5

Giving Profiles: Understanding Donor Motivations

Donors give for a variety of reasons. Understanding what is most important to them can deepen their connection to your organization, and potentially increase their level of financial commitment. Discover the seven basic categories of donors and the motivations behind their generosity. Learn how each type of donor appreciates being invited, involved, and thanked for their support, and gain experience building a few donor profiles.

SESSION 6

Continuing Action Plan

Developing a plan for ongoing development is critical to building long-lasting donor relationships. Participate in a guided discussion with cohort members, and work with your coach to develop an action plan for your next year of donor development.

FEES FOR THE ADVANCEMENT TRAINING AND COACHING PROGRAM

The proposed Advancement Training and Coaching Program includes six zoom training sessions and six strategy calls provided each month over six months (January 2021 to June 2021)

- The tuition fee for entry into the program is \$7,500 for the entire six-month service. Tuition payment is due with the signing of the Advancement Training and Coaching Program contract.
- A payment plan option is also available upon request. The payment plan allows for payments as service is rendered. This includes a \$500 administrative fee with the initial payment. The first payment of \$1250, plus the \$500 administrative fee, is due with the signing of the Advancement Training and Coaching Program contract. Each subsequent payment is due by the 1st of each month over the course of the following 5 months (Feb 1, Mar 1, April 1, May 1, and Jun 1).

Please feel free to contact me if you have any questions. I am looking forward to the opportunity to work together.

With appreciation,



Teri O'Connor, Ed.D, CFRE
CEO and Senior Consultant,
Advancement by Design
972-567-2088
toconnor@advancementbydesign.com