Visual Map

2024 Summer Intensives: Creating Major Gift Success July 22, 2024 – August 2, 2024

All class meetings are 75 minutes and will take place from 11:00 am - 12:15 pm (Eastern); 10:00 – 11:15 am (Central); 9:00 – 10:15 am (Mountain); 8:00 – 9:15 am (Pacific) Each class is live with participants actively engaged and screens on. If you are unable to commit to the complete schedule please register for a future workshop.

Module 3: Module 1: Introduction Module 2: Welcome, Navigation, Preparing for and Asking Discovery & Qualification What You Told Us for Gifts Tutorial: Tutorial: Zoom Class Meeting #7 In advance: Zoom Class Meeting #5 Getting the Appointment When is the right time to ask? Closing a Gift Exercise Welcome packet All about solicitation and making (donor questions/closing) Homework: Complete prethe case Thursday, August 1, 2024 workshop survey and schedule for your institution Homework: watch next Tutorial your coaching appointment. Tutorial: Tuesday, July 30, 2024 Tutorial: and prepare/submit written Moving from Engagement to Homework: watch next Tutorials, solicitation strategy to your Athletic Listening Solicitation record your pitch and submit it manager. Zoom Class Meeting #1 Tutorial: **Private Coaching Session** Tutorial: Introductions, survey results, gift Asking is a series of Collaborative Zoom Class Meeting #3 Friday, July 26 or Developing a Written Solicitation officer qualities/best practices Conversations Monday, July 29 Getting the Appointment Strategy Monday, July 22, 2024 Time: to be arranged Wednesday, July 24, 2024 Homework: watch Tutorials, Homework: watch next Tutorials (one hour session) analyze portfolio/submit After coaching and make 1-2 prospect appts. Tutorial: homework: watch next How to Plan a Solicitation Zoom Class Meeting #8 Tutorials; review case study Getting it All Done Meeting/Discussion materials "Graduation" Ceremony Tutorial: Friday, August 2, 2024 Prioritizing and Managing Your Tutorial: Portfolio Zoom Class Meeting #6 Qualifying Prospects Tutorial: Solicitation Exercise What is the right amount (up through the ask) to ask for? Wednesday, July 31, 2024 Tutorial: Homework: watch next Tutorials Understanding Wealth & Tutorial: and submit Zoom pitch Philanthropy Meaningful Engagement recording if you've not already Tutorial: done so Architecture of a Solicitation (including a sample solicitation) Zoom Class Meeting #2 Tutorial: Zoom Class Meeting #4 Discussion of portfolio analysis Anticipating and Responding to Qualifying a Prospect: and understanding wealth and Donor Questions Small Group Exercise philanthropy Thursday, July 25, 2024 Tuesday, July 23, 2024 Homework: watch next Tutorials Homework: watch next two and prep for coaching session. **Tutorials** Tutorial: Closing A Gift

Washburn �McGoldrick