Washburn McGoldrick

Visual Map

2026 Winter Intensives: Creating Major Gift Success Monday, February 2 - Friday, February 13, 2026

All class meetings are 75 minutes and will take place from 11:00 a.m. - 12:15 p.m. (Eastern); 10:00 a.m. - 11:15 p.m. (Central); 8:00 - 9:15 a.m. (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 1: Introduction

Welcome, Navigation, What You Told Us

Module 2:

Discovery & Qualification

Module 3:

Preparing for and Asking for Gifts

In advance:

Welcome packet Homework: Complete preworkshop survey and schedule your coaching appointments.

Tutorial:

Getting the Appointment

Tutorial:

Athletic Listening

Tutorial: When is the right time to ask?

Tutorial:

Moving from Engagement to Solicitation

Zoom Class Meeting #5 All about solicitation and

making the case for your institution's goals Tuesday, February 10 Homework: watch next

Tutorials, record your pitch and submit it.

Zoom Class Meeting #7 **Closing a Gift Exercise** (donor questions/closing) Thursday, February 12

Homework: watch next Tutorial and prepare/submit written solicitation strategy to your coach.

Tutorial:

Developing a Written

Solicitation Strategy

Zoom Class Meeting #8

Getting it All Done

"Graduation" Ceremony

Friday, February 13

Homework: prepare/submit

written solicitation strategy to

your coach if you've not

already done so.

Zoom Class Meeting #1

Introductions, survey results, gift officer qualities/best practices, your learning outcomes Monday, February 2 Homework: watch Tutorials, analyze portfolio/submit.

Zoom Class Meeting #3 Getting the Appointment

Wednesday, February 4 Homework: watch next Tutorials and make 1-2 prospect appointments.

Private Coaching Session

Friday, February 6 or Monday, February 9 Time: to be arranged (one hour session)

After coaching homework: watch next Tutorials: review case study

Tutorial:

Asking is a series of Collaborative Conversations

How to Plan a Solicitation Meeting/Discussion

Tutorial:

What is the right amount to ask for?

Tutorial:

Architecture of a Solicitation

Tutorial:

Zoom Class Meeting #6

Solicitation Exercise (up through the ask) Wednesday, February 11

Tutorials and submit Zoom pitch recording

Homework: watch next

Tutorial:

Anticipating and Responding to **Donor Questions**

Post Workshop Private Coaching Session

Time: to be arranged in week following workshop (one hour session)

Live feedback on your pitch video and discussion of your solicitation strategy.

Tutorial:

Tutorial:

Prioritizing and Managing Your

Portfolio

Understanding Wealth & Philanthropy

Zoom Class Meeting #2

Discussion of portfolio analysis and understanding wealth and philanthropy Tuesday, February 3 Homework: watch next two **Tutorials.**

Tutorial:

Qualifying Prospects

Tutorial:

Meaningful Engagement

Zoom Class Meeting #4 Qualifying a Prospect: **Small Group Exercise** Thursday, February 5

Homework: watch next **Tutorials and prep for** coaching session.

Tutorial:

Closing A Gift