



PHOENIX PHILANTHROPY'S ADVANCEMENT ACADEMY

The Advancement Academy is a suite of professional development modules from the experts at The Phoenix Philanthropy Group. Our high-quality curriculum, delivered via interactive workshops, is fully customizable. Contact us at 602-380-2478 or info@phoenixphilanthropy.com to discuss the learning needs in your organization.

1. Culture of Philanthropy

Characteristics of a culture of engagement and philanthropy, and what your organization can do to build, enhance, and optimize your culture for improved constituent engagement and fundraising performance.

2. Issues and Trends in Fundraising

Overview and analysis of critical data and leading trends in charitable giving, including relevant information that can be readily used to enhance your fundraising performance.

3. Building a Comprehensive Fundraising Program

Diversify your fundraising strategies to expand your revenue potential. Fundraising is more than direct mail, events, or campaigns. A comprehensive fundraising operation deploys multiple strategies to communicate, create awareness, raise funds, and recognize donors; and offers multiple ways for donors to engage and structure their donations.

4. Setting Fundraising Priorities and Goals

With your strategic plan as the foundation, we will assist your staff in visioning the future of their programs, identifying the fundraising priorities that emerge, determining which priorities are most attractive to prospective donors, and setting realistic fundraising goals.

5. Communicating with Prospects, Donors, and Key Stakeholders

5A: How to Articulate and Position Funding Priorities for Fundraising Success

Basic components of an effective articulation of your priorities and goals, the initial elements of a case statement, and strategies for donor and stakeholder engagement.

5B: Case for Support

Essential elements of a compelling case for support – the document that articulates your unit's vision, mission and impact – that will inspire prospective donors to invest. An in-depth workshop that builds on the Articulation and Position module.



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6. Prospect Development and Engagement

6A: Prospect and Donor Relationship Management Cycle

Key characteristics, strategies, and tactics for each stage in the management cycle; and exploration of where your staff members and volunteer leaders are the most comfortable, effective, and can add the greatest value within the cycle.

6B: Prospect Development

Identifying and qualifying high-potential prospects in all aspects of fundraising, including individual, foundation, and corporate prospects for annual fund, leadership annual giving, major gifts and transformational gifts, planned or legacy gifts, and campaigns.

6C: Meaningful Engagement and Cultivation

Creating alignment between your donors' and your vision, mission, and values and preparing the right ask.

6D: Making the Major Gift Ask

Strategies, preparation activities, roles, and contingencies related to making a successful major gift ask, and the appropriate follow up.

6E: Transformational Giving

Donors at the highest levels have the ability to transform an organization in ways that will have profound short- and long-term impact. How do you know if your organization is ready to explore opportunities associated with transformational donors and their investments? How do you identify and engage prospective transformational donors? What are the rewards – and risks – associated with gifts of this complexity or magnitude?

7. Volunteer Leadership Development and Engagement

7A: Optimizing Volunteer Engagement and Impact

Characteristics of the ideal volunteer leader, recruitment and engagement strategies, and potential roles and responsibilities for your volunteers and staff.

7B: Building an Effective Board/Optimizing the Impact of Your Board

How to build an effective Board of Directors and optimize their impact across your organization and the communities you serve.



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8. Campaign Planning and Management

8A. The Phases of a Campaign – Readiness, Preparation and Planning, Management and Execution, Conclusion and Celebration

Essential phases of a campaign, how each phase influences the likelihood of success, key players, and how to know whether your organization is ready for a campaign.

8B. The Art and Science of Campaigning

How an organization must manage to the science of a campaign – the plans, tools, and rigor – while employing the art of campaign fundraising in order to be proactive or responsive to change.

8C. Communications in a Quiet Phase

Campaigns have “quiet” phases and “public” phases. Why are campaigns structured that way? How quiet is quiet? How you can start the drumbeat without ever using the word “campaign.”

9. Fundraising Roles, Responsibilities, and Partnerships

What are the fundraising roles and responsibilities of your leaders, managers, staff and volunteers? What are the appropriate divisions of labor, and how do these parties communicate and work together to enhance fundraising performance and optimize constituent, prospect, and donor engagement?

10. Alumni and Constituent Engagement and Relations

10A. Alumni and Constituent Relations Fundamentals

High-level fundamentals, as well as detailed examples, of successful alumni and constituent engagement and relations programs, including strategic communications and mutually-beneficial relationship management.

10B. Building an Alumni and Constituent Engagement and Relations Program on a Limited Budget

How effective alumni and constituent relations programs are based first on a solid, consistent, and proactive communications plan and then on engagement strategies that leverage existing organizational events.