

**AHP Virtual Institute for Healthcare Philanthropy**  
**VIRTUAL Elements of Major Gifts Track 2021**  
 Donna Budak, Dean  
 Sarah Fawcett-Lee, Associate Dean  
 Tim Self, Faculty  
 And Guest Faculty

***BLUEPRINT***

Minimum number of students: 20  
 Maximum number of students: 40

Students must have their prospect/donor portfolio on hand throughout the course.

Each faculty member will serve as faculty advisor to 5-10 students. Faculty will post office hours, and students may sign up for open slots as needed. Advisors will help make sure their students make progress on their independent projects.

Pre- and post-course Questionnaire (Survey Monkey) – years in role, years’ fundraising experience, size of shop, how comfortable with solicitation, how comfortable working with physicians etc.

The times of the classes listed below are in Eastern Standard Time.

<b>June 29 – Tuesday</b>		
1:00-2:45 p.m. EST	<b>Orientation and Making the Most of the AHP Virtual Institute Experience</b> <ul style="list-style-type: none"> <li>• Faculty introductions</li> <li>• Ensure all students have the tools needed (headphones, webcam or laptop with camera, and access to the learning platform) and can use the technology successfully</li> <li>• Orientation to online learning</li> <li>• What to expect during the AHP Virtual Institute</li> <li>• Course preview</li> <li>• “Getting to Know You” breakouts (Tim to lead)</li> </ul>	Donna Budak Tim Self Sarah Fawcett-Lee

<b>July 01 – Thursday</b>		
2:00-3:00 p.m. EST	<b>Introduction to Major Gifts</b> <ul style="list-style-type: none"> <li>• What is a major gifts program?</li> <li>• What is the difference between transactional and transformative giving?</li> <li>• What does it take to be a successful major gifts officer?</li> </ul>	Donna Budak (Leader) Sarah Fawcett-Lee Tim Self
3:00 p.m. EST	<b>BREAK</b>	
3:15-3:45 p.m. EST	<b>Discuss Students’ Independent Projects</b> <b>Assign students to faculty advisors</b> <b>Describe advisory role and office hours</b>	Donna Budak (Leader) Sarah Fawcett-Lee Tim Self

<b>July 08 – Thursday</b>		
1:00-2:00 p.m. EST	<b>Donor Motivations</b> <ul style="list-style-type: none"> <li>• In-depth examination of gratitude</li> <li>• What also motivates donors?</li> </ul>	Sarah Fawcett-Lee (Leader)
2:00 p.m. EST	<b>BREAK</b>	
2:15-3:30 p.m. EST	<b>Prospect Identification</b> <ul style="list-style-type: none"> <li>• What is a prospect?</li> <li>• How do you build a prospect pipeline?</li> <li>• How and when to use wealth screening</li> <li>• How to develop a network of philanthropy champions</li> <li>• Physician and clinician engagement</li> </ul>	Tim Self (Leader) Donna Budak Sarah Fawcett-Lee

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<b>July 9 – Friday Additional Session for Canadian Students</b>		
1:00–2:15 p.m. EST	<b>Canadian Breakout session</b>	Ingrid Perry, Guest Faculty

<b>July 13 – Tuesday</b>		
1:00-2:00 p.m. EST	<b>Strategic Leader, C-Suite and Volunteer Engagement</b>	Doug Dillon, Guest Faculty
2:00 p.m. EST	<b>BREAK</b>	
2:15-3:30 p.m. EST	<b>Setting Priorities and Portfolio Management</b> <ul style="list-style-type: none"> <li>• What should your portfolio look like?</li> <li>• How do you go about prioritizing your work?</li> <li>• Pipeline management</li> <li>• Assign homework to categorize and organize their portfolios</li> </ul>	Sarah Fawcett-Lee (Leader)

<b>July 15 – Thursday</b>		
12:30 – 1:45 p.m. EST	<b>Engaging Physicians in Philanthropy</b>	Dr. Les Matthews, Guest Faculty
1:45 p.m. EST	<b>BREAK</b>	
2:00 – 3:00 p.m. EST	<b>Qualification</b> <ul style="list-style-type: none"> <li>• Getting the visit                             <ul style="list-style-type: none"> <li>○ Work on script</li> <li>○ Role playing</li> </ul> </li> <li>• What do to on a qualification visit                             <ul style="list-style-type: none"> <li>○ Work on script</li> </ul> </li> </ul> <b>Role playing</b>	Doug Dillon, Guest Faculty
3:00 – 3:15 p.m. EST	<b>BREAK</b>	
3:00 – 4:00 p.m. EST	<b>Cultivation</b> <ul style="list-style-type: none"> <li>• Asking questions and active listening</li> <li>• Connecting the donor's passion to opportunities for investment</li> <li>• Laying the groundwork for an invitation to invest</li> <li>• Role playing the soft ask</li> </ul>	Donna Budak (Leader) Tim Self

<b>July 20 – Tuesday</b>		
1:00-2:15 p.m. EST	<b>Moves Management</b> <ul style="list-style-type: none"> <li>• Students will develop a moves plan for one of their top prospects</li> </ul>	Sarah Fawcett-Lee (Leader)
2:15 p.m. EST	<b>BREAK</b>	
2:30-3:45 p.m. EST	<b>Stewardship</b>	Donna Budak (Leader)

<b>July 22 – Thursday</b>		
1:00-2:15 p.m. EST	<b>Solicitation</b> <ul style="list-style-type: none"> <li>• Practice and role playing</li> </ul>	Tim Self (Leader)
2:15 p.m. EST	<b>BREAK</b>	
2:30-3:45 p.m. EST	<b>Guest Panel of veteran gift officers</b>  Stephanie Foster, MedStar Health Ashley Nall, Johns Hopkins All Children's Shannon Curley Tower, Tower Philanthropy <b>TBD (Canadian panelist)</b>	Guest Faculty Moderated by Shannon Duval

<b>July 27 – Tuesday</b>		
1-2:15 p.m.	<b>Integrating Major Gifts into a comprehensive program</b>	<b>TBD, Guest Faculty</b>

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EST		
2:15 p.m. EST	<b>BREAK</b>	
2:30-3:45 p.m. EST	<b>Integrating Gift Planning with Major Gifts</b>	Tim Logan, Guest Faculty

<b>July 29 – Thursday</b>		
1-2:15 p.m. EST	<b>Ethics</b>	Donna Budak & Sarah Fawcett-Lee – co-presenters

To be schedule by faculty advisors		
<b>Student Presentations</b>		
Each student will present their final project to their “advisory group” and faculty advisor at the end of the course. 5 minute maximum per presentation.		