

AHP Virtual Institute for Healthcare Philanthropy
VIRTUAL Elements of Major Gifts Track 2020
Donna Budak, Dean
Sarah Fawcett-Lee, Associate Dean
Tim Self, Faculty
Jeff McAloon, 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.

September 3		
1:00-2:00 p.m. EST	Orientation <ul style="list-style-type: none"> • To ensure all students can use the technology successfully • To ensure students have the tools needed (headphones, webcam or laptop with camera, and access to the learning platform) • Assign homework/reading assignments • Direct students to the Huddle for downloads and handouts 	Tim Self, Leader Donna Budak Sarah Fawcett-Lee Jeff McAloon

September 10		
1:00-2:00 p.m. EST	Making the most of the AHP Virtual Institute Experience <ul style="list-style-type: none"> • Faculty introductions • What to expect during the AHP Virtual Institute • Course preview • Orientation to online learning • Ice Breaker (Tim to organize) 	Donna Budak (Leader) Sarah Fawcett-Lee Tim Self Jeff McAloon
2:00-2:30 p.m. EST	Discuss Students’ Independent Projects Assign students to faculty advisors Describe advisory role and office hours	Donna Budak (Leader) Sarah Fawcett-Lee Tim Self Jeff McAloon
2:30 p.m. EST	BREAK	
2:45-3:45 p.m. EST	Introduction to Major Gifts <ul style="list-style-type: none"> • What is a major gifts program? • What is the difference between transactional and transformative giving? • What does it take to be a successful major gifts officer? 	Donna Budak (Leader) Sarah Fawcett-Lee Tim Self Jeff McAloon

September 15		
1:00-2:00 p.m. EST	Donor Motivations <ul style="list-style-type: none"> • In-depth examination of gratitude • What also motivates donors? • Show gratitude videos (MedStar, AnMed Health, Virtua, etc.) • 	Sarah Fawcett-Lee (Leader)
2:00 p.m. EST	BREAK	
2:15-3:30 p.m. EST	Prospect Identification <ul style="list-style-type: none"> • What is a prospect? • How do you build a prospect pipeline? • How and when to use wealth screening • How to develop a network of philanthropy champions 	Tim Self (Leader) Donna Budak Sarah Fawcett-Lee Jeff McAloon

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	<ul style="list-style-type: none"> • Physician and clinician engagement 	
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Additional Session for Canadian Students – Date and time to be scheduled by Jeff McAloon		
(75 min)	Canadian Breakout session	Jeff McAloon (Leader)

September 17		
1:00-2:00 p.m. EST	Strategic Leader, C-Suite and Volunteer Engagement	David Gillig, Guest Faculty
2:00 p.m. EST	BREAK	
2:15-3:30 p.m. EST	Setting Priorities and Portfolio Management <ul style="list-style-type: none"> • What should your portfolio look like? • How do you go about prioritizing your work? • Pipeline management • Assign homework to categorize and organize their portfolios 	Sarah Fawcett-Lee (Leader)

September 22		
1:00-2:15 p.m. EST	Qualification <ul style="list-style-type: none"> • Getting the visit <ul style="list-style-type: none"> ○ Work on script ○ Role playing • What do to on a qualification visit <ul style="list-style-type: none"> ○ Work on script ○ Role playing 	Jeff McAloon (Leader)
2:15 p.m. EST	BREAK	
2:30-3:45 p.m. EST	Cultivation <ul style="list-style-type: none"> • Asking questions and active listening • Connecting the donor's passion to opportunities for investment • Laying the groundwork for an invitation to invest • Role playing the soft ask 	Donna Budak (Leader) Tim Self Jeff McAloon

September 24		
1:00-2:15 p.m. EST	Solicitation <ul style="list-style-type: none"> • Practice and role playing 	Tim Self (Leader)
2:15 p.m. EST	BREAK	
2:30-3:45 p.m. EST	Guest Panel of veteran gift officers Stephanie Foster, MedStar Health Colin Hennigar, SickKids Foundation Ashley Nall, Johns Hopkins All Children's Shannon Curley Tower, Tower Philanthropy	Guest Faculty Moderated by Shannon Duval

September 29		
1:00-2:15 p.m. EST	Moves Management <ul style="list-style-type: none"> • Students will develop a moves plan for one of their top prospects 	Sarah Fawcett-Lee (Leader)
2:15 p.m. EST	BREAK	
2:30-3:45 p.m. EST	Stewardship	Donna Budak (Leader)

October 1		
1-2:15 p.m. EST	Integrating Major Gifts into a comprehensive program	Shannon Duval, Guest Faculty
2:15 p.m. EST	BREAK	

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2:30-3:45 p.m. EST	Integrating Gift Planning with Major Gifts	Tim Logan, Guest Faculty
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October 6

1-2:15 p.m. EST	Ethics	Donna Budak & Sarah Fawcett-Lee – co- presenters
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Beginning October 7 – to be schedule by faculty advisors

Student Presentations

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.