

## THE ABBAY GROUP INSTITUTE

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The Abbey Group Institute grew from years of experience and presentations to clients and nonprofits. The Institute provides the opportunity to experience the difference between good and great fundraising.

Suggested topics include:

### Fundraising 101, or Starting at the Beginning Again

Fundraising is not easy, and you cannot learn it from simply reading a book. Let's start at the beginning and build a solid foundation. Knowing the essential elements of all development and stewardship is key to success. This comprehensive session addresses key elements while blending anecdotes, success stories and challenges. When finished, you'll leave with a deeper understanding of donors, motivations and methods. Even the seasoned pro can benefit from this comprehensive presentation.

#### Objective

- Present the essential elements of fundraising and development

#### Outcomes

- Enhance understanding of development and build solid development fundamentals
- Identify tools to engage current and potential donors
- Introduce attendees to cyclical stewardship
- Gain confidence in your development abilities

### Generational Giving

From Generation Z to the Greatest Generation, there are vast differences in motivations among the generations. Join us for an intuitive presentation on the formation and motivations of each generation, and how to increase the return on your philanthropy efforts for every generation. Crafting your message and approach will yield great results!

#### Objective

- Discuss the formulating factors, motivations and specific actions of all generations in philanthropy

#### Outcomes

- Provide a solid foundation for understanding all generations and their motivations
- Invoke ideas on how to approach any generation in philanthropy work
- Assist attendees with a communication plan for all generations, including segmentation of generational communication
- Inform attendees about how to contact, connect with and seek gifts from any generation

### Baby Boomers: Today's Major Donors

It is no secret that the Baby Boomer generation makes up the majority of today's major donors. Many have the willingness and capacity to support the causes they care about most. Have you engaged them the *right* way? In this presentation, Abbey Group will give you the information and tools you need to engage today's major donors in a *major* way.

#### Objective

- Present characteristics of members of the Baby Boomer generation, their formulating factors and how these influence their philanthropy as today's major donors

#### Outcomes

- Provide attendees with an understanding of the Baby Boomer generation and learn about "Generation Jones," a generation within a generation
- Invoke ideas on how *who* they are influences *what* they are (and could be) as philanthropists
- Set a foundation for communication with them via their preferred means
- Inform attendees about cultivating major gifts from Baby Boomers and stewarding them long-term

### Millennials: Tomorrow's Major Donors

The new era of philanthropy is upon us. The Millennial generation makes up the largest portion of today's work force. What does this mean for philanthropy and organizations like yours? Join Abbey Group to find out what makes this generation unique and how to engage them before they pass you by.

#### Objective

- Present characteristics of members of the Millennial generation, their formulating factors and how these influence their philanthropy

#### Outcomes

- Provide attendees with an understanding of the Millennial generation
- Invoke ideas on how *who* they are influences *what* they care about in comparison to other generations
- Set a foundation for communication with them via their preferred means
- Inform attendees about stewarding and building relationships with them long-term

### Campaign Bootcamp

Don't let a campaign intimidate you! Join Michael, a veteran of over 40 campaigns, to learn the simple steps to success, challenges to overcome and obstacles to avoid. It's as easy as 1-2-3-4-5. No marching, pushups or 5-mile hikes with 75lb. backpacks required!

#### Objective

- Present the essential components of any campaign and a “30,000-foot” overview of how to begin a campaign

#### Outcomes

- Learn five elements of campaign success
- Understand the importance of a plan and timeline
- Comprehend the importance of campaign leadership and volunteers
- Leave the session with confidence in campaigning

### Just Make the Ask: Conquering the Fear of the Ask

Whether development professional or volunteer, we have a great responsibility to the organization. Every ask is important. Although making an ask is vital, it does not need to be a source of anxiety, especially if you prepare before you are in front of your prospect for the final approach. Join us as we discuss practical ways to conquer your fears and gain the confidence to make those asks!

#### Objective

- Address the importance of the personal “ask” and conquer the fear of making the “ask”

#### Outcomes

- Identify the essential elements of the solicitation
- Learn the do's and don'ts of making an ask – practice makes perfect!
- Understand the tools you can use and when to use them
- Gain confidence in your role as a development professional

### Sustainable Philanthropy

Learn the important dynamics of donor stewardship, whether pre-gift or long-term. As we move into a new era of philanthropy, stewardship has a prominent role in development and philanthropy management.

#### Objective

- Understand the importance of stewardship in philanthropy

#### Outcomes

- Learn specific steps to start or improve your organization's stewardship
- Understand the importance of a plan and timeline
- Comprehend the importance of leadership and volunteers
- Leave the session with confidence in campaigning

### Major Gifts: The Big Finish

Knowing how and why people give, and the most effective way of asking for a major gift is paramount to successful fundraising. Review development fundamentals and how to engage current and potential donors for major gifts.

#### Objective

- Attain the elusive major gift and even the transformational gift

#### Outcomes

- Learn major donor motivations
- Understand the stewardship process for major gifts and major donors
- Keep It Simple and Win! It's not that hard if you follow our advice.
- Leave the session ready to be a super solicitor!

### Donor Centered Philanthropy: Because the Cause Comes First

Donor-centric messaging is a concept based on simplicity, but often overlooked in practice. Join Abbey Group for exciting facts, updates and interesting anecdotes on donor-centric messaging. It's all about the donor – and, at the conclusion of this presentation, you will be ready to retool or recreate your donor messaging.

#### Objective

- Understand the heart of philanthropy: the relationship

#### Outcomes

- Understand how to develop and sustain donor relationships
- Learn a simple process for success
- Revamp your communications and personal contact to appeal to donors and prospects
- Feel comfortable with your donors and never again be afraid to ask!

### Getting the Board on Board

Having an engaged and active board can make all the difference in how your organization grows and thrives. It is imperative that the “board is on board” with your mission, values and plan. In this presentation, you will identify your board’s strengths and opportunities to enhance the board’s performance. Tools will be provided for your use to help you better engage the board as a whole to reach your development goals.

#### Objective

- Share development definitions, examples and opportunities to align with the unique qualities and skills of board members and the leadership team

#### Outcomes

- Increase confidence and enhance skills for attaining development success
- Understand tips for engaging board members in stewardship activities
- Provide examples of how your team can achieve development goals
- Learn how to keep your board engaged

### Details, Details, Details: Governance, By-laws, Process

What exactly is the role of a board? You already know the board should be active and engaged, but what about all of the details that set the board up for success? Join us as we walk you through the roles and responsibilities of the board and provide the tools you need to support your governance system. You will leave this presentation feeling like you can build a strong board or fine-tune the one you have!

#### Objective

- Learn about high-impact governance, the duties of a nonprofit board and the systems required

#### Outcomes

- Understand the three roles and elements of a nonprofit board: guidance, oversight and monitoring
- Share examples of board and committee position descriptions
- Learn how to conduct a board self-evaluation to focus on continued engagement and success
- Ensure processes are in place to adhere to up-to-date bylaws

### Who's Next: Succession Planning

Properly planning for a shift in leadership is essential for a smooth transition. In this presentation, Abbey Group directors will walk you through the steps involved to design a succession plan to better prepare for any road bumps along the way. You will leave feeling confident your organization's future will be in good hands!

#### Objective

- Understand the steps involved to prepare for nonprofit board succession

#### Outcomes

- Determine the skills, qualities and experiences required of board members to meet the organization's strategic vision and plan
- Update board position descriptions
- Refine the board governance and succession process
- Implement an annual board self-evaluation to improve satisfaction of board members in their roles

### All in the Family: Positioning for Success with a Family-Owned Business

Families are complex and powerful systems. Combining the emotional intensity of family with the competitive and results-oriented world of business is particularly challenging. Join Sandra in this thought-provoking and engaging presentation. You will leave with the tools and confidence to engage multi-generational family enterprises with your mission.

#### Objective

- Learn how to engage family enterprises across generations through stewardship and engagement

#### Outcomes

- Understand the philanthropic impact family enterprises have throughout the nation
- Share tools for bringing family members of a family enterprise together to develop a philanthropic vision and goals
- Share examples of the positive impact a philanthropic focus can have for the family enterprise and your organization
- Identify and understand best practices when engaging a family business

### Demystifying Direct Mail

Effective direct mail appeals aren't really about how wonderful the charity is. They are, instead, about how wonderful donors are. Making donors feel important is Job #1. It's called "donor-centricity." It's exactly like "customer-centricity." Direct mail can be a strong way to communicate legitimacy and evoke confidence in old and new donors.

#### Objective

- Address the myths and facts about direct mail, focusing on best practice in the digital age

#### Outcomes

- Identify "odd" things that make direct mail function well, including "do's and don'ts"
- Appreciate the effectiveness and potency of direct mail
- Understand how the use of email/social media should correspond with direct mail
- Provide an understanding of how different generations respond to direct mail

### Gearing Up for Your Annual Appeal: Learn to Tell Your Story!

Position your organization and appeal to donors through your message to yield positive annual appeal results. Storytelling means impact – learn how to tell your story to achieve annual appeal success. You will learn when to tell your story, how to tell your story and how to make a deeper connection to your donors!

#### Objective

- Learn the art of storytelling in philanthropy

#### Outcomes

- Identify the eight key factors that will impact your annual appeal
- Discuss how events can play a part in your annual appeal planning
- Understand the importance of ongoing stewardship with your donors and prospects
- Learn how to use multiple outreach channels to make your annual appeal a huge success

### Lions, Tigers and Bears: Capital Campaigns in the Land of Oz

Campaigns are a huge undertaking, but they don't need to be overwhelming. Join Abbey Group as we walk you down the yellow brick road toward a successful campaign - beginning, middle and end. You will leave this presentation with the outline and tools you need to make your campaign attainable. You don't need to be a wizard, but you'll learn multiple ways to click three times to success!

#### Objective

- Outline a plan for your campaign and prepare for and identify ways to overcome possible challenges and obstacles

#### Outcomes

- Identify the “yellow brick road” or path to success for your campaign
- Bring awareness to possible challenges, obstacles and successes surrounding your campaign
- Understand who will play the key roles in your campaign and how you can leverage their strengths
- Learn and understand the “*rules-of-three*” in a campaign

### Innovations, Trends and the Future in Philanthropy

Philanthropy is an ever-evolving and it is essential to keep up with the trends. In this presentation we cover the changes over the years and help you better understand the future of philanthropy. You will leave feeling more confident and prepared to be successful today and in the future!

#### Objective

- Increase your knowledge of philanthropy through prospect groups, solicitation approaches and action steps

#### Outcomes

- Understand common trends in philanthropy over the decades
- Learn and discuss innovations in philanthropy today
- Access tools that will help you feel more confident and prepared in your role
- Identify solicitation approaches and action steps to successfully make the ask

### Through the Looking Glass: Philanthropy Redefined

The sequel novel to Alice in Wonderland is Through the Looking Glass. In it, Alice walks through the mirror into a new world. Join Abbey Group to see your reflection in the philanthropy mirror, then join us on a walk through the looking glass into the new world of 21<sup>st</sup> century philanthropy.

#### Objective

- Understand the history of philanthropy in the 20<sup>th</sup> Century and learn how to improve your development and stewardship in the new era, the 21<sup>st</sup> Century

#### Outcomes

- Identify and understand the generational differences in philanthropy
- Understand individual donor motivation and *why* donors give
- Learn five ways to increase giving
- Recognize the importance of stewardship and identify how you can better steward each generation



### Content is King: Incorporating Storytelling in your Case Statement

An excellent and compelling case statement is key to any organization, especially those who are launching a philanthropy campaign with specific initiatives such as capital, endowment or program funding. How do you know your case statement is ready? In short, a great case statement tells a story. The reader will connect through stories and emotion. So, start telling a story!

#### Objective

- Understand the key components of a case statement and identify ways to better connect with the reader

#### Outcomes

- Understand the six key elements to make a good case statement a great one
- Practice evoking emotion in the reader with practical tips and tricks
- Learn to tell a successful story
- Share tools for writing clearly and concisely while still engaging the reader

### Identifying and Qualifying Donor Prospects

Successful fundraising is about finding the right donors. When choosing donor prospects, it is important to know what your organization needs and who is most likely to support these needs. In this presentation you will learn what qualities to look for in your donors and how to select donors for making the ask.

#### Objective

- Understand how to identify and qualify donor prospects

#### Outcomes

- Learn and understand the three ways to identify a major donor
- Gain a better understanding of donor capacity
- Identify and appreciate a donor's inclination
- Appreciate the value of a volunteer

### Building an Endowment

What is an endowment? You may hear this buzzword thrown around the development world but perhaps you never understood why endowments are so important. Join Abbey Group as we explain exactly what endowments are and how they can change the future of your organization.

#### Objective

- Understand how to build or grow an endowment

#### Outcomes

- Answer the million-dollar question: *What is an endowment?*
- Understand what an endowment can do for the future of your organization
- Identify the steps to grow an endowment for your organization
- Learn about the policies and procedures that should be in place before you build an endowment

### Strategic Planning: From Development to Successful Implementation

Developing and implementing a strategic plan can be daunting tasks for your organization. You want to create an efficient and effective strategy for your organization that will guide you toward growth and success. Join Abbey Group in this interactive presentation that will leave you feeling confident that your organization's strategic plan will be razor-sharp.

#### Objective

- Walk through the ten essential steps to creating and implementing an effective strategic plan

#### Outcomes

- Identify areas of strength and growth for your organization's strategic plan
- Learn the ten essential steps to strategic planning and dive into each step
- Gain confidence in your organization's strategic planning process
- Engage stakeholders to effectively implement your plan

### The Role of the Board in a Campaign

Imagine this, your organization is gearing up for a large campaign. You've done your research and you feel prepared and excited to officially launch your campaign. You might feel ready but how is your board feeling? Do they understand what their role should be in a campaign? You will not be successful unless the board fully understands what they will be responsible for before, during and after the campaign. It's time to get your board on board!

#### Objective

- Understand the ways your board of directors should be involved in a campaign

#### Outcomes

- Identify the many ways board members can be involved in a campaign
- Learn why 100% board participation is essential
- Gain confidence in your board's ability to engage with prospects and donors
- Understand why engagement is the key to an active board

### Coming Soon!

### Introduction to the Development Professional

So, you're new to the development profession! Many of us didn't plan to be here but alas, here we are. Whether you're a young professional or making a mid-career shift, join Abbey Group as we discuss the ins and outs of how to be successful in this great profession.

### Social Media Marketing

People are accustomed to having endless amounts of information at their fingertips. Consistent communication and constant connection have become the norm. This has led to a rise in digital marketing, specifically via social media platforms. Digital marketing, when used effectively, can help organizations reach more people than ever before. Join Kelsey as she introduces the key steps to kickstart your social media marketing.

### Personal Branding

According to Merriam-Webster Dictionary, a brand is a "public image, reputation, or identity conceived of as something to be marketed or promoted." Most Americans recognize a brand as the Nike swoosh and the tagline "Just Do It," but how do you brand yourself? Oprah has one of the most influential personal brands in the world. What does the importance of personal branding mean for you? You are the most powerful marketing tool in your toolkit. It is time that you start investing in your personal brand. In this presentation, you will learn the secrets of personal branding and why it is important in today's world.

### The Power of the Young Professionals Board

You may be wondering why so many "Young Professional Board of Directors" are popping up here and there. It is because the member of these YP boards make up the future of our

organization's boards. Join Kelsey as she walks you through the purpose, benefits and the do's and don'ts of starting a successful Young Professionals Board.

### **The Intentional Fundraiser**

Many seasoned fundraisers know that the pressure and energy needed to be great can be exhausting. Burnout is prevalent in the fundraising profession. In this presentation, you will learn how to be more intentional about how to use your time, talents and treasures so that you can be a better fundraiser. You will leave feeling empowered to harness the best of what you have to offer and make this next fundraising year the best yet.

### **Generation X: Major Donors to-be**

Generation X consists of those individuals born between 1966 and 1980. Generationally sandwiched between the Baby Boomers and the Millennials, X-ers came of age before the cell phone replaced the rotary phone and after MTV became cool. Join Abbey Group to find out what makes this generation tick and how to steward them today toward becoming tomorrow's very next major gift givers.