



cultivating elite  
fundraisers

# Workshop Offerings

## 2023

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## Strategic Focus: Raising More by Doing Less

**Objective:** To evaluate the viability of five fundraising strategies for your current organizational lifecycle: major gifts, grants, annual giving, events, corporate sponsorships. To analyze the top two strategies which could collectively raise more revenue when highly operationalized than 3-5 strategies which are only somewhat operationalized.

**Description:** Fully operationalizing one to two fundraising strategies will have a bigger return than maintaining three to five strategies at a mediocre level. The activity you say “no” can only strengthen you. Through teaching, workshopping, and case studies, we will equip you to evaluate the viability of each strategy as if you were your own consultant. You will consider each strategy through a matrix that ranks: sustainability, return on investment, return horizon, scalability, and needed infrastructure.

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## Fundraising for Volunteers

**Objective:** To evaluate the viability of five fundraising strategies for an organization run by volunteers: major gifts, grants, annual giving, events, corporate sponsorships. To analyze the most effective methods for fundraising for an organization run by volunteers.

**Description:** A volunteer-run or small grassroots organization will think about fundraising from a return-on-investment perspective: what is the single most important fundraising activity we can do to maximize our time? This workshop will support grassroots teams in evaluating their fundraising activity through a ROI filter. Through teaching, workshopping, and case studies, we will equip you with decision-making skills on the fundraising activities that will have the biggest return on investment for your team.

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## Measuring the Immeasurable

**Objective:** To identify manageable strategies for measuring program outcomes that seem elusive

**Description:** We know that setting outcome goals is a critical step to activating generosity toward your organization. But what if your program model includes intangible outcomes? Things like “changing community behavior,” “developing sense-of-self,” or “forming an improved family bond.” In this 2.5 hour workshop, we will identify goals that provide clarity to your organization as well as leverage generosity from donors. We will then create the building blocks of an evaluation plan for goals that seem impossible to measure.

We will first articulate the importance of measuring outcomes: the way lives, land, and minds are transformed. This is different from measuring outputs: *how many* lives, acres, or ideas you spread. Next we will generate ideas for how to measure outcomes. We answer the question, ‘We’ve chosen the right goals, now how exactly do we measure them?’ We will use case studies from real organizations and invite participants to workshop their own goals.

## Learning Outcomes:

As a result, participants will be able to:

- Identify the difference between outputs and outcomes
  - Identify the building blocks for outcome goals that serve as a north star for program leaders and invitations to generosity for donors
  - Imagine manageable strategies for measuring outcomes that seem elusive
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## Problem/Solution Framework

**Objective:** To clarify and distill the problem your organization is designed to solve.

**Description:** In addition to the mission and vision, it’s crucial that we identify the core problem being addressed and the corresponding solution in simple, singular terms. Potential donors are most likely to engage the organization when the problem is concise and the solution is clear.

Depending on the organization, communicating the problem or opportunity that its addressing in simple terms can sometimes be incredibly difficult or relatively easy. And communicating the solution can often be very complex. One

of the most high-impact skills we as fundraisers can develop is the ability to distill our organization to the most critical knowledge.

Above all, concise problems and simple solutions offer hope to potential donors that their generosity will have a significant impact. This workshop will help you distill the most precise version of the problem your organization is designed to solve as well as the unique solution you bring to your field.

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## Vocational Conviction: Fundraisers as Essential Workers

**Objective:** To understand fundraising to be of innate value rather than a necessary evil.

**Description:** Fundraisers are in great demand. Pay rates are rising. And yet, the fundraising profession is facing a talent crisis. Even with the increase in technical training, academic study, and professional accreditation, the fundraiser's reputation for excellence and tenure remains tragic. 40% of all fundraisers expect to leave the profession within 24 months. Despite this, we have the opportunity to re-imagine our work and define our purpose through a different lens.

So often, there are a few questions that a fundraiser never asks: Am I made for this work? If nonprofits went away today, would I still actively ask people to be generous with their money? Is this cause enough to sustain my daily work even when success seems impossible? When I show up to work with my best self, is it others generosity I care about most?

This course allows fundraisers and organizational leaders to diagnose the systemic barriers that exist within the profession. We will work to diagnose these barriers at the organizations we work within. We will also re-imagine our role as less of a necessary evil and more of an essential worker for a thriving culture.

Ultimately, we will view fundraisers as a rare mix of storytellers, nurturers, and challengers – drawing out a donor's personal stories and passions with great care while daring them to great generosity. The voice of the fundraiser will build the measure of generosity in our culture.

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## The Fundraiser's Relationship with Money

**Objective:** To diagnose our relationship with money and learn how to create missional relationships with donors.

**Description:** There are three possible postures between fundraiser and donor: subservient, managing, and missional. It's important to accurately self identify our natural bent in order to more fully step into the vision that we have for our work. The subservient posture elevates the donor such that the fundraiser becomes simply the donor's benefactor. On the other end of the continuum is the managing posture in which the donor is simply an asset to the fundraiser. Somewhere in the middle is a missional posture which is a gesture toward mutuality. The donor activates their vision for the world through the opportunities offered by the fundraiser. Where do our donor relationships fall on this spectrum? In this course, we will practice the skill of reflecting on our posture with donors and the skills of converting donor relationships from ineffective to effective.

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## Making Big Asks: Guiding Donors to Understand their Own Philanthropy

**Objective:** To evaluate current ask strategies for the degree to which they activate generosity. To conduct an audit of my current ask strategies, identifying those with low, medium, and high probability of activating generosity. To shift less effective communication strategies in order to leverage increased generosity from major donors.

**Description:** The fundraiser holds a responsibility to challenge and support the donor in the intentional act of giving once a missional relationship is formed. Within the fundraiser-donor relationship, the fundraiser initiates a partnership focused on action. We ask our donors the question, "how will your story have an impact on the world?"

This course explores our current communication strategies with donors and allows us to practice the four components of a great "ask."

First, we remind ourselves that activating generosity is the call of the fundraiser. It is the action point of our occupation and is the most explicit piece of our work. We then reiterate that the act of giving is an expression of the donor. Third, we need to be excellent at casting a vision for the impact that a gift will have on the world. The donors we work with have philanthropic options. But the best option is the one that is informed by their heart and offers the promise of meaningful impact. Fourth, the more clear our ask, the better. So often, we as fundraisers are too timid with communicating the call to action. You're their guide through this process. Guides provide clear direction. Lastly, great fundraisers don't stop at the ask. They reflect with donors. They help donors consider how it felt to give, the hope they have for the gift, etc. These conversations can be wonderfully rewarding for the fundraiser and donor alike.

This course will invite you to re-evaluate your approach to asking for major gifts. You will become clearer and more comfortable making asks with new tools for helping donors understand their own philanthropic priorities.

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### Storytelling for Fundraisers

**Objective:** To formulate a personal connective story built on vulnerability that drives missional relationships.

**Description:** Vulnerably telling our own stories gives donors permission to tell their own. It's a simple truth, but when donors share their stories with us, they are emotionally investing in us. And this is the greatest form of investment we can ask for – financial gifts come later. In this course, we will outline the components of a transformational connective story, share examples, and facilitate activities to help you begin to create and test your own.

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### Major Gift Portfolios: Planning Your Next Move

**Objective:** To identify the activity and milestones required to move a donor from prospect to long-time investor.

**Description:** Major gift fundraising starts with planning. Successful major gift fundraisers create clear, goal-oriented plans. The best fundraisers we've met do 3 things really well. First, fundraisers authentically connect with donors through sharing and evoking stories. Second, great fundraisers submit to the process – they commit to the daily activities that when executed over time produces missional, generous relationships. But the 3<sup>rd</sup> strength of great fundraisers is that they spend time gaining clarity on their plan and direction forward. This is the core objective of this workshop: identifying meaningful and strategic next steps with major donors throughout the course of their donor journey.

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### Appeal Writing During Crisis

**Objective:** Adjust your appeal-writing strategy to increase giving during times of wide-spread crisis

- Format appeals for increased engagement
- Evaluate messages on a spectrum of tone-deaf to fully relevant
- Distill the elemental passions core to your organization's work
- Diversify your formulas for conveying impact

**Description:** When a crisis lands in our community or world, a natural disaster, an economic depression, an attack, a pandemic--nonprofit leaders are challenged with navigating fundraising. Do we continue to ask for money? Do we wait? How do we engage our donors in meaningful ways?

At Seed, we *lean* into fundraising during a crisis when we know our work solves an essential problem. When we are confident that we have pivoted our programming to ensure our impact persists. We lean away from making the assumption that our donors can't give during a crisis. We let *them* decide rather than avoiding an ask. During 9-11, again in 2008, and now during the pandemic, the organizations who kept fundraising stayed around. And those that didn't, went away. Those who weren't shy to ask thrived.

In short, we absolutely believe *increased* giving is a real possibility during times of crisis; but only if the invitations you extend into the world are relevant, distilled, and bold. We believe that you have an opportunity to write appeals that succeed in both providing something meaningful to your donors and activating generosity.

In this workshop, we're going to help you create an internal rubric for you to write appeals that activate generosity. The internal rubric is one that will be established through the exercises in this course. By the end of the workshop, you will have an increased sensitivity to writing appeals that are on point for your current events and land with your intended audience.

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## Creating an Annual Giving Calendar

**Objective:** To coordinate segmentation, messaging, and mediums to activate and steward giving across a 12 month plan

**Description:** By the end of this workshop, you will be able to plan, execute, and analyze an annual giving campaign at your organization, moving supporters through a cycle from non-donor to long time supporter.

In order to get you there, we're going to explore the mindsets essential for executing an effective annual giving strategy and consider why we might use annual giving in the first place.

Then we're going to unpack each stage of the annual giving cycle so that you can understand the purpose and intended outcome of each stage. Next we'll talk about how to execute each stage of the cycle. This requires understanding the channels, segmentation strategies, and messaging strategies used at each stage. Ultimately, you will need to create an annual giving plan for your organization, so we'll discuss how this comes together. Finally, we want you to know if your annual giving plan is effective. We're going to end this unit with performance metrics of your annual giving plan.

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## Increasing your Grant Writing ROI

### Objectives:

- To design strategy and infrastructure for scalable grant writing operations
- To understand that the most crucial skill in using grants as a fundraising strategy is to carefully curate an application that works within your operational framework.
- To determine which funding sources to work with--if a funding opportunity will solve or create problems for my organization.
- To put together an application that will be manageable if funded.
- To create rhythms and habits for incorporating grants in their portfolio of strategies

**Description:** This workshop assists fundraisers in using grants strategically within their fundraising plan so that the return on investment is greater than the effort required to acquire and manage the grant.

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## Invitations to Impact

### Objectives:

- To identify the north star for the impact you wish to achieve through your programs
- To identify the corresponding milestones toward that end
- To analyze the current messages used to invite donors to give for the way in which they communicate transformational impact

**Description:** Invitations to impact are the messages we extend to donors which invite them to see the transformational result of their giving. They depict the way in which people, places and things are transformed as the result of our work together. They are offered as an impact statement and corresponding missional goals. The impact statement describes what the world will look like when we knock it out of the park on our mission statement. The

missional goals describe what the milestones toward achieving that impact require. Developing these statements are not the work of the fundraising team alone, but require the leadership of your program team as well. They serve as a north star for your programming first and invitations to donors second.

In this workshop, we will answer the following questions:

Do you have a compelling invitation to impact? Are your programs measuring the way in which lives, or places, or things are transformed? Or are they measuring the quantity of effort? Are donors clear on what you will achieve with their gift? Is that achievement compelling?

In this workshop, we practice the analytical skills to create useful and compelling invitations to impact that support both program leaders and fundraisers.

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## Invitation to Belonging

**Objective:** To distill the fundamental elements of our identity and create the elemental invitation we make to donors

**Description:** Behavioral economics tell us that individuals make giving decisions that reinforce aspects of themselves they wish to enhance. They shop for giving opportunities with which they can identify with the leadership, or brand, or ethos of the organization. The Invitation to Belonging is a message that is crafted to speak to the human desire to belong. When well crafted, it attracts life-long donors. It identifies the attributes of the individuals that make up the organization. It says, “If you resonate with these traits, you are in good company here.” It states the organization’s reason for being, answering the question, “What are we for?” It also states the organization’s differentiators, answering the question, “What are we against?” When held together, these simple sentences create a red-hot center of support by which donors orbit and find a sense of belonging. In this workshop, we will guide organizations through the process of crafting an Invitation to Belonging.

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## Events as Transformative Experiences

**Objectives:**

- To analyze if event fundraising meets the ROI threshold for your organization
- To compare the value of different event types (cultivation, stewardship, connector)
- To analyze the difference between a meaningful and transformative event experience
- To identify the crucial skillsets necessary for this work and a resource to develop them
- To understand the critical factors necessary to plan and execute a transformative virtual event

**Description:** The ultimate measure of success as an event fundraiser is to successfully connect and compel others towards a story beyond their own. Events are opportunities for connecting people’s stories to impact beyond themselves. In this workshop, we’ll start by analyzing the use of events for fundraising and how to determine if an event strategy is right for your organization at its particular lifecycle. We’ll understand the elements of transformative events, then unpack the mindsets of successful event fundraisers. We’ll dive into the elements of a great event plan and end with looking at the crucial skill sets necessary for this work, including virtual event management.

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## Development Operations Tune Up

**Objective:** To identify gaps in tools and processes that impact fundraising efficiencies

**Description:** Development operations are the systems and practices that function behind the scenes on a fundraising team. They are things like prospect research, gift processing and gift acknowledgment, and data administration.

If you take one thing away from this workshop, let it be this: Your systems and practices exist for the sake of front line efficiency and organizational visibility. Nothing else. You may be tempted to use development operations to build a

well-oiled machine, but sometimes we make the mistake of building machines that distract us rather than save us time. How can you tell the difference between efficiency and sophistication?

In this workshop, we will share some of the mindsets and processes that will help you manage development operations when you have no margin for excess or error.

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### **Websites for Fundraising**

**Objective:** Remove the current barriers to online conversion on your website

**Description:** In this workshop we evaluate the elements of a website which is optimized for converting leads to donors. We share examples of the websites we love. We work through a checklist of web design and user experience elements that are proven to convert. We analyze group participants' websites for priority changes that could be made in order to improve your fundraising performance.

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### **Engaging your Board in Fundraising**

**Objective:** Establish clarity of focus for boards in their support of fundraising efforts

**Description:** Board members often fall on distinct ends of a spectrum when it comes to supporting the fundraising operations of an organization. They can either be completely disengaged and resistant to fundraising or they can offer unsolicited advice while trying to manage fundraising strategy on their own. Even a board that is not specifically designed for fundraising can be organized to support the core efforts of the team. In this workshop we will establish a plan for bringing the board alongside the fundraising team to prioritize their focus. We will share specific ways to engage your board in fundraising such as introducing you to major gift or corporate sponsor leads, hosting connector events, or supporting your stewardship activities. You will also learn how to talk with your board about fundraising so that they see it less as a necessary evil and more as a core function and service of the organization.