



Transformative Major Gifts: Progressive Pipeline and Portfolio Management **SERIES**

Instructor:

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11:00 a.m. – 3:00 p.m. ET

Cost: \$1,200/person



CEUs: 8 CFRE
education points

Successfully advancing significant gifts requires a mix of proactive and deliberate action alongside an inherent understanding of the needs, motivations and intentions of donors. However, great gift officers know achieving the right balance is rooted in developing authentic relationships while utilizing well-developed and articulated tools and processes.

This two-part educational series can kickstart your path to higher performance, whether you are currently responsible for securing significant gifts or aspire to grow into a major gift focused position. The journey begins by exploring the concept of transformative major gifts, unpacking relationship-based giving and pressure-testing your current fund development practices against these constructs. You will uncover how to develop a sustainable pipeline of qualified donors and how to more effectively manage a portfolio of highly engaged individuals. You will build a cohort and re-imagine your current philanthropy program through a relationship-based giving lens. In reviewing your approach, you will also consider how to break the traditional institutional-focused donor cycle to best leverage your donor's intent with your most strategically aligned projects within in your health system. You will explore core and evolving practices and tools that support donor-centered philanthropy within health care organizations. You will also consider the outreach volume needed and review current metrics. Ultimately, this series strives to help you elevate your efforts, rethink the use of your time and reignite meaningful donor engagement.

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