Executive Fund Development Leadership Program

A Certificate Program in Nonprofit Executive Leadership
presented by
The University of Notre Dame’s Mendoza College of Business
in partnership with
The Community Foundation of Elkhart County
To the Nonprofit Leaders of Elkhart County:

The Mendoza College of Business at the University of Notre Dame is proud to offer you an executive certification program opportunity in nonprofit administration designed for the rising nonprofit executive of the future. The Executive Fund Development Leadership Program is a certification program that involves participating in five two-day sessions over a five month period. This is the result of a unique partnership between Nonprofit Professional Development at Mendoza College of Business at the University of Notre Dame and the Community Foundation of Elkhart County.

This certificate program is geared to the needs of the emerging nonprofit executive or program person and will offer a total of 60 hours of instruction during 10 full-day sessions (five 2-day sessions over five months). The certificate will also award 6 Continuing Education Credits (CEUs) and 60 Continuing Professional Credits (CPEs) to those who successfully complete the certificate requirements. Those requirements are that every participant must attend at least 90% of the sessions (9 out of 10 sessions) and must also complete a field project. A presentation on the field project is also required during the last two days. No exceptions will be made. The purpose of this certification program is to help nonprofit professionals further develop the business skills needed to prepare for future assignments and strategically guide and daily manage their organizations, particularly in these times of challenging and changing constituent needs. The program was designed specifically based upon input from nonprofit leaders in Cicero and the surrounding communities.

Nonprofit Business Excellence is partially underwritten by the University of Notre Dame to include the cost of faculty, learning materials, and other direct costs in order to make this unique program affordable to all nonprofit organizations in these communities. Additional registration information can be found on the attached form. A 10-day program such as this would normally cost more than $8,000. However, because of the support from the Community Foundation of Elkhart County, organizations serving Elkhart County are eligible to register for a fee of $1,500. Organizations not serving Elkhart County are welcome to register for a fee of $2,500.

For more information, contact: Marc Hardy, PhD at mhardy@nd.edu.

The University of Notre Dame has a rich and long-standing tradition of commitment to the development of nonprofit leaders. We are pleased to extend this commitment into Elkhart County through the creation of focused executive educational opportunities.

Sincerely,

Marc A. Hardy

Marc Hardy, PhD
Director, Nonprofit Executive Programs
Executive Fund Development

OVERVIEW

Presenter and Course Content Facilitator: Mark Germano, President, Creating Solutions

Mark C. Germano is a seasoned nonprofit executive with 30-plus years of experience either working for — or providing consulting services to — nonprofit organizations. He has raised more than $650,000,000 in his career and has been able to consistently build strong donor relationships with corporate and civic leaders. He has been an innovator in the nonprofit field, introducing online-giving strategies, implementing program outcome measurements into the development efforts, and building effective approaches to work with older donors. Germano has worked at the local, regional, state and national levels in leadership roles in a variety of organizations that include: social services, education, faith-based and voluntary health organizations. Germano is the president of Creating Solutions, which is a consulting firm committed to improving the financial and operational success of nonprofit organizations.

Additional presenters to be determined.

Goal: To enhance the understanding, impact and effectiveness of Elkhart County not-for-profit leaders in assuring sustainability and growth for the future. A special focus will be on using current agency data, coupled with industry best practices, and research to enable all participants to build fundraising action plans that can be implemented upon completion of the program.

Background: The not-for-profit organizations in the Elkhart County area provide services that are essential to the quality of life throughout. The ability of not-for-profit leaders, including staff and board members, to strategically plan and manage to not only survive but thrive in this time of uncertainty is essential to success. A series of training opportunities focused upon major trends, constraints, data analysis, and strategic choices will enable participants to better navigate organizational effectiveness. Issues and opportunities to create and utilize strategies such as fee for services, earned income, self-generated income opportunities, growth of philanthropic support, collaborations, advocacy, mergers and acquisitions and tax policy will be explored. There will be special emphasis on the art and science of fund raising, creating a culture of philanthropy and the consideration of implementation strategies and tactics to enhance success.

Format: It is proposed that five 2-day facilitated workshops be designed for training and orientation utilizing best practices. Participants would be invited to attend all ten days, but each would be self-contained around given content. There will be a focus on case studies, homework assignments from session to session, cohort learning and the creation of practical implementation strategies for large and small organizations. Small and relatively underdeveloped programs along with mid-size and larger institutional fund development programs will be explored to enhance participant’s knowledge of the elements that need to be in place for success and to build a program over time.

Course Instructor/Facilitator: Mark C. Germano, President of Creating Solutions. With more than 35 years in the not-for-profit sector. Mark frequently lectures on issues facing the sector. Having led and/or consulted with hundreds of not-for-profit organizations in every aspect of management and strategy, both theory and practical application will be explored. Other instructors will be utilized as appropriate. Leaders from various size development programs will share their wisdom and experience to assure a practical, hands on, learning experience.
Learning Objectives: Through the workshops, participants will be expected to know:

1. The macro environment in which not-for-profits operate
2. Major trends that will impact the sector over the next three to five years
3. Using agency data to understand trends, create strategies, and implement action plans that improve the organization’s ability to deliver its mission
4. Roles and responsibilities of board members
5. Duties of care and loyalty
6. Fiduciary responsibilities
7. Philanthropic trends and best practices
8. Strategic planning for not-for-profits
9. Strategic leadership
10. Processes for collaboration
11. Annual, capital, endowment and special fund raising techniques and strategies
12. Planned giving

SESSION I: JANUARY 14-15, 2016 (8:30 AM - 4:30 PM)

“Starting with a Solid Strategic Plan”

“The Philanthropic Landscape: History and Evolution, Current and Future State”

1. History
2. Size and scope
3. Macro and micro trends
4. Self-assessment tools – overview and to be completed by each participant
5. Fiduciary, strategic and generative leadership
6. Expectations of board members
7. Roles and responsibilities
8. Strategic planning processes
9. Impact and outcome measures

SESSION II: FEBRUARY 11-12, 2016 (8:30 AM - 4:30 PM)

“Strategic Differentiation: Telling Your Story”

1. Visioning and aspirational impact
2. Case development/ How to tell your story?
3. Branding your organization
4. Marketing your organization
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5. Communications and external relations
6. Stewardship of key constituents
7. Elevator speech development
8. Emerging tools and techniques
9. Utilization of social media
10. Stakeholder and target audience identification
11. Research implications regarding generational giving.

Learning Format: Lecture, case studies, and homework centered upon analysis of organizational case for support, communication and marketing strategies to be completed by next session.

“Overview of Effective Philanthropic Strategies”

1. Philanthropic trends
2. Transactional and transformational fundraising
3. Major and planned gift strategies
4. Individual, corporate and foundation giving
5. Effective solicitation techniques
6. Capital, annual and endowment fund raising
7. Acquisition strategies
8. Use of persuasion theory in fund raising
9. Utilization of board members
10. Dashboard to measure success

Learning Format: Lecture, Case studies, and homework consisting of an analysis of historic giving patterns and the creation of a dashboard to measure performance.

SESSION III: MARCH 10-11, 2016 (8:30 AM - 4:30 PM)

“Annual Fund Strategies”

Recent trends in annual fund programs

1. Prospect identification
2. Acquisition strategies
3. Cultivation
4. Solicitation methods
5. Donor migration and upgrade strategies
6. Use of annual giving clubs
7. Stewardship related to annual giving
8. Utilization of board members
9. Measures of success
10. Keys to success

Learning Format: Lecture, case studies and discussion. Homework assignment will consist of creating an 18 month annual fund for the participant’s agency using template as a guide.
“Foundation & Corporate Giving”

1. Prospect identification processes and relation driven techniques
2. Engagement strategies
3. Prospect management
4. Use of data and tracking systems
5. What needs to be in place for the organization
6. What is the prospect experiencing
7. Building your case for support in a foundation and/or corporate grant application

Learning Format: Lecture, case studies and discussion. Homework will include assignment around identifying prospects and creating cultivation strategies.

SESSION IV: APRIL 14-15, 2016 (8:30 AM - 4:30 PM)

“Building a Sustainable Individual & Family Giving Program

1. Prospect identification processes and relation driven techniques
2. Engagement strategies
3. Prospect management
4. Use of data and tracking systems
5. Evaluating the effectiveness of your events
6. What needs to be in place for the organization
7. What is the prospect experiencing
8. Use of persuasion theory in major gifts
9. What research tells us about high net worth households
10. Solicitation techniques for major gifts
11. Use of Board members, civic leaders and other volunteers
12. Making the call
13. Overcoming objections
14. Donor recognition
15. Use of Giving Clubs

Learning Format: Lecture, case studies and discussion. Homework assignment will include actual calls as well as role playing and simulated exercises in class.
“Planned Giving and Endowment Development”

Bringing about transformational gifts

1. Prospect characteristics
2. Prospect identification
3. Stewardship and migration strategies
4. Getting started with minimal resources
5. Restricted vs. unrestricted funds
6. Various vehicles for giving
7. Use of allied professionals
8. Managing expectations
9. Revocable and non-revocable gifts
10. Use of planned giving circles
11. Recognition

Learning Format: Lecture, case studies and discussion. Homework assignment will consist of the creation of a plan to implement, or enhance the Planned Giving function of the participant’s organization. A template will be provided with guidance.

SESSION V: MAY 19-20, 2016 (8:30 AM - 4:30 PM)

“Self-Generated Income: A Path to Sustainability”

Case studies TBD

1. Leveraging assets and structures
2. Utilizing non-performing assets
3. Exploring business structures
4. Start-up capital investment
5. Identifying core competencies
6. Use of program-related investments
7. Social Venture structure
8. Use of Lc3 and other emerging structures

Learning Format: Lecture, case studies and discussion. Homework will consist of analyzing opportunities for increasing self-generated income, evaluating core competencies and other soft assets, assessing hard assets that can be monetized.
“Pulling It All Together: Comprehensive and Integrated Strategies for Success”

1. Creating a strategic plan
2. Processes and tools
3. Measuring impact and success
4. Dashboard creation
5. Community needs assessment
6. Collaboration as a strategy
7. Presentation of your action plan

Learning Format: Lecture, class discussion, cohort discussion related to leanings, development of S.M.A.R.T. (specific, measurable, appropriate, realistic, time-sensitive) action plans to focus activity and implementation plans.
University of Notre Dame – Executive Fund Development Leadership Program

Location: IUSB Elkhart Center,
125 E. Franklin Street
Elkhart, IN 46516

Registration Guidelines

⇒ 6 Continuing Education Credits (CEUs), and 60 Continuing Professional Credits (CPEs) will be awarded to those who attend all ten full-day seminars.

⇒ Approved registrants will receive a confirmation letter and application. The application must be completed and returned, along with the program fee. Organizations serving Elkhart County are eligible to register for a fee of $1,500. Organizations not serving Elkhart County are welcome to register for a fee of $2,500.

Attendance of all five sessions is required to receive a Certificate of Completion from the University of Notre Dame.

Registration

Agency Name

Participant Name

Title

Mailing Address

City, State, Zip

Phone Number

Fax Number

E-Mail Address

Make Checks or Money Orders Payable to:

Community Foundation of Elkhart County

Please Return this Registration Form and Check to:

Jodi Spataro
Community Foundation of Elkhart County
101 S Main St, Elkhart, IN 46514

(574) 295-8761
e-mail: Jodi@InspiringGood.org