

## INSTITUTE PROGRAM

DAY ONE – Monday, May 5, 2008

### “THE PLATFORM FOR SUCCESS: LONG-RANGE PLANNING AND LEADERSHIP DEVELOPMENT”

PHILOSOPHY OF APPROACH	9:00	<b>I. Introduction to the “Maximum Gifts Approach”©</b> <ul style="list-style-type: none"><li>• Trends in Philanthropy</li><li>• Critical Success Factors</li><li>• Key Synergies</li><li>• The Opportunity for Success</li></ul>
PLAN AS PLATFORM	9:30	<b>II. From Mission to Budget: The Critical Importance of Integrated Planning to Fundraising Success</b> <ul style="list-style-type: none"><li>• Strategic and Long-Range Planning</li><li>• Creating the Business Plan and Business Case</li><li>• Quantifying the Challenge</li><li>• Relationship to the Major Gifts Process</li></ul>
	10:15	<b>Break</b>
	10:30	<b>III. Panel: Why Planning Matters: The Pathway to Success</b> <ul style="list-style-type: none"><li>• How can the planning process support the fundraising process?</li><li>• How do major donors and funders respond?</li></ul> <p>Guest Speakers:</p> <p><b>Christine Dwyer</b> Senior Vice President, RMC Research Corporation Trustee, Currier Museum of Art</p> <p><b>James Pietro</b> President, Board of Trustees, Worcester Academy</p> <p><b>Elizabeth Sullivan</b> Senior Vice President, The Kresge Foundation Chair, Nonprofit Finance Fund</p>
	12:00	Lunch
PARTNERSHIP	12:30	<b>IV. The Philanthropic Partnership: I</b> <ul style="list-style-type: none"><li>• How can we awaken the best instincts in our major donor prospects?</li><li>• How can we motivate major donors to move to a new level of giving?</li></ul> <p>Guest Speakers:</p> <p><b>Deborah McKenna</b> Trustee and Past Chair, Shore Country Day School</p> <p><b>Bill McQuillan</b> Principal, Boylston Properties President, Board of Trustees, Huntington Theatre Company</p> <p><b>Susan Whitehead</b> Community Leader</p>
	2:00	<b>Break</b>
	2:15	<b>V. Leadership Development: Cultivation to Linkage—From Parties to Partners</b> <ul style="list-style-type: none"><li>• Board development, Adjunct Boards, and Visiting Committees</li><li>• How can we design and apply successfully new models of “connection,” proprietary interest, and involvement?</li><li>• What’s the real relationship between leadership development and ultimate gift support?</li></ul>
	2:45	<b>VI. Panel: Leadership Development</b> <p>Guest Speakers:</p> <p><b>Martha Kleinman</b> Dean for External Relations, Walnut Hill School</p> <p><b>David Whalen</b> Director of Development, Union of Concerned Scientists</p>
	4:00	<b>VII. Discussion</b>
	4:30	<b>Adjournment</b>

(Speakers confirmed as of 2/1/08)

**INSTITUTE PROGRAM**  
**DAY TWO –Tuesday, May 6, 2008**  
**“MAKING IT REAL—SECURING MAXIMUM GIFTS”**

<b>OPENING SESSION</b>	9:00	<b>I. Welcome and Re-cap</b> <ul style="list-style-type: none"><li>• Critical Success Factors</li><li>• Highlights of Day One</li><li>• Responses to Critical Issues</li></ul>
<b>MANAGEMENT</b>	9:30	<b>II. Structuring a Program, Measuring Success</b> <ul style="list-style-type: none"><li>• Metrics of a Campaign/Major Gifts Program</li><li>• “The Funnel”</li><li>• Linking Fundraising Success to Business Plan</li></ul> <p>Guest Speaker: <b>Lisa Bevilaqua</b> Deputy Director of Development Isabella Stewart Gardner Museum</p>
	10:15	<b>Break</b>
<b>SOLICITATION</b>	10:30	<b>III. Asking and Closing</b> <ul style="list-style-type: none"><li>• Building and Making the Case for Support</li><li>• Making the Ask</li><li>• Closing</li><li>• Handling Common Objections</li><li>• Q&amp;A</li></ul>
	12:45	<b>Break</b>
	1:00	<b>Lunch</b>
<b>PARTNERSHIP</b>	1:30	<b>IV. The Philanthropic Partnership: II</b> <ul style="list-style-type: none"><li>• What motivates high net worth individuals to make major philanthropic investments?</li><li>• What institutional characteristics or “behaviors” create an optimal climate for donor investment?</li></ul> <p>Guest Speakers: <b>John and Molly Beard</b> Philanthropists and Community Leaders <b>Pamela Tanner Boll</b> Artist, Writer, Filmmaker, Activist Philanthropist and Community Leader</p>
<b>ULTIMATE GIFT</b>	3:00	<b>V. The Ultimate Gift</b> <ul style="list-style-type: none"><li>• How can we take advantage of the interplay among donor resources and institutional needs to insure the maximum, most ultimately satisfying and useful gift?</li><li>• Can we “borrow” from case studies of successful principal gift solicitations?</li></ul> <p>Guest Speakers: <b>Marillyn Earley</b> Director of Development, Worcester Academy <b>RoseAnn Lovely</b> Director of Development, New England Center for Children <b>Katelyn Quynn</b> Executive Director of Development, Massachusetts General Hospital</p>
	4:00	<b>VI. Discussion</b>
	4:30	<b>Adjournment</b>