



Major Gifts Intensive 2025 Curriculum

Module 1: The Science of Major Gift Fundraising

March 4 - Get Set For Success: Mindset, Teamwork and Culture of Philanthropy

- Build support for major gift fundraising across your institution
- The importance of an abundance mindset and a “million-dollar gift” mindset
- How to build and support a major gifts team
- Emotional intelligence as a fundraising tool

March 11 - Prospect Management and Your Pipeline By The Numbers

- Create a predictable model for major gifts and how to estimate the value and timing of a prospect portfolio and how to right-size donor portfolios
- The role of prospect research and discovery calls for qualifying donors and find the high-net-worth donors in your donor pool and in your community
- Establish the right metrics for success, manage your data for results, and a discussion of major gift officer performance
- Using analytics to measure your results and managing major gift officer performance in real-time, making mid-course corrections

March 18 - Mastering The Skills That Build Major and Mega Donor Relationships

- Mastering the soft skills and first impressions to enhance first impressions and successful visits with donors
- Why “conversational fundraising” is an asset for any fundraiser and how to move the donor in their interest and enthusiasm
- Power conversations that open the door for a gift conversation and how to navigate the tough questions

Module 2: The Art of Major Gift Fundraising

March 25 - Deep Dive: Mastering the Art of the Discovery Call

Eli Jordfald, CFRE, Executive Director, Health Care Philanthropy, UNC Health Foundation, will share her time-tested, proven discovery strategies to uncover sizable gifts.

- How to conduct a successful discovery conversation that flows easily, while still generating information you need to plan your next steps with your donor
- Why smart major gift fundraisers devote time and attention to the Discovery Process and how to tell early on who is most likely to make a significant gift
- How Eli has used her tested and highly effective discovery techniques to close 6- and 7-figure gifts, even virtually, and she'll share stories illustrating how Discovery work on the front end resulted in sizable gifts

April 1 - Group Coaching Call # 1 - with your small group cohort

April 8 - Deepen Relationships and Create Strategies For Major and Mega Gifts

- Tips for landing donor visits and for setting up successful donor meetings and the ultimate listening skills
- Using the [Major Gift Plan by the Numbers](#) to lead your team to success
- Insights to build credibility and trust with donors, in good times and tough times
- The nuances of working with high-net-worth donors and prospects

April 15 - Deep Dive: What Board Members Need to Know About Major Gifts

Please extend an invitation to each board member for this special presentation specifically for Board Members. We will cover why every organization should invest in major gifts teams and how they can support the work of the major gift fundraisers

- The importance of creating an organizational culture of philanthropy and how board members can help
- Why major gift fundraising provides the highest return on investment for every nonprofit and how board members can support major gift fundraising teams
- A high-level overview of the major gifts approach and must-have skills for fundraisers
- How Board members can effectively invite friends, peers and colleagues and get them intrigued about the impact your mission has on the community

Module 3: Closing Major and Principal Gifts

April 22 - Creating Actionable Discovery Plans for Major Gift Prospects

- The vital roles of qualifying donors and prospects with discovery calls and prospect research and the qualification skills all fundraisers need to have
- Understanding how weighing net worth vs philanthropic history will help you identify the high-net-worth donors who may give to your mission
- Identifying and segmenting your priority prospects to use your time and efforts efficiently for maximum giving
- Discovering the donors' values to maximize gift conversations

April 29 - Group Coaching Call # 2 - with your small group cohort

May 6 - Accelerating and Preparing for The Ask

- Uncovering and understanding a donor's philanthropy triggers and how to move into a Conversational Ask
- Artful questions that guide The Ask conversation and the dynamic questions that lead your donor to offer a gift without an Ask
- How to test for the right dollar amount and how to accelerate the ask by opening up a direct Gift Conversation

May 13 - Techniques For Setting Up and Closing Asks

- Breaking down the seven steps to a formal Ask
- Advanced asking and closing techniques with three successful approaches: The Oblique Ask, The Gap Approach, and The M-P-I Ask
- Nailing the gift conversation itself
- A step-by-step guide to permission-based Asking

Module 3: Closing Major and Principal Gifts continued

May 20 - Deep Dive: Finding Database Gems and Getting the Most Out of Wealth Screenings with Kathryn

Kathryn Gamble, Ph.D. will share how to accurately read your data and craft a plan to reach new, previously undiscovered High Opportunity major and principal prospects using your screening data.

- How to track, organize and analyze your data plus the benefits of using reports to build your Major Gift Plan by the Numbers
- How to read a wealth screening or use reports to build a Capacity/Affinity model to create a prioritized list of suspects and prospects, using a case study
- Craft a Fundraising by the Numbers plan to organize your major gift fundraising process, build a portfolio for each major gift officer, and manage the work on the front end resulted in sizable gifts.

May 27 - Group Coaching Call #3 - with your small group cohort

June 3 - Deep Dive: Blending Legacy and Major Gift Asks

Ligia Peña, CFRE is an international legacy consultant at GlobetrottingFundraiser where she specializes in helping nonprofits with their fundraising and legacy strategy.

- Why legacy/ planned gifts are important to include in any major gift program and the key components to have for smaller organizations
- How to begin conversations with donors about legacy/ planned gifts during major gift conversations and key points to include
- The top myths about legacy gifts and how you can bust them

Module 3: Closing Major and Principal Gifts continued

June 10 - Deep Dive: Launch a Successful Capital Campaign Using The Major Gifts Intensive Methods

Gail Perry and Kathryn Gamble will show you how everything you've learned in the Major Gifts Intensive and especially how using the Fundraising by the Numbers approach can be the first step in quantifying and building up your capital campaign potential. This session will also cover the importance of smart feasibility studies, using wealth screenings and/ or reports and discovery calls to determine who are the right people to approach for the lead gifts.

June 17 - Tying It All Together

The Major Gifts Intensive faculty will offer a high-level overview of the 7 core webinar ideas and celebrate wins from our 4 months together, followed by a lively Q&A session.