

Institute for Philanthropic Leadership



**LEADERSHIP GIFT SCHOOL
2015-2016 SCHEDULE**

FOUNDING SPONSORS

Bank of America

The Duke Endowment

Duke Energy Foundation

Wells Fargo

SUPPORTING SPONSORS

Arts & Science Council

Association of Fundraising Professionals - Charlotte

Blumenthal Foundation

Blue Cross Blue Shield of North Carolina

William and Patricia Gorelick Family Foundation

Robinson Bradshaw & Hinson

United Way of Central Carolinas

Sponsor information is current as of December 31, 2014

About the Institute for Philanthropic Leadership

In 2008, philanthropy leaders in Charlotte were inspired to develop a program to help educate nonprofit leaders about how to cultivate individuals for major gifts, an effort that resulted in the creation of the Institute for Philanthropic Leadership (IPL) and its inaugural program, the Leadership Gift School.

Our programs offer a new model for developing major gifts by providing hands-on, practical instruction to help nonprofit leaders learn how to cultivate individual donors, understand their motivations and desire to make gifts that are meaningful.

Our objective is to build the fundraising and programmatic capacity of educational/nonprofit organizations by providing their leaders with the tools and knowledge to create a culture of philanthropy in their organizations and engage nonprofit board members in fundraising in a meaningful way.

The Institute for Philanthropic Leadership is an independent 501(c)(3) nonprofit corporation governed by a board of directors. With the oversight of the board of directors, Karla A. Williams, ACFRE, serves as Faculty Director and Chris McLeod, JD with GIVING MATTERS, is responsible for handling fundraising, marketing and program-related responsibilities.

Our 2015-2016 Schedule

We have expanded our educational programs to offer the community three different tracks designed to meet their needs and interests. All IPL programs integrate our three learning themes: Impact Fundraising, Leadership Gifts, Philanthropic Culture. All sessions will be taught by Faculty Director Karla A. Williams with presentations by donors, thought leaders and nonprofit executives.



BOARD OF DIRECTORS

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Children's Theatre
of Charlotte

STAFF

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Faculty Director

Chris McLeod, JD
Fundraising & Operations
GIVING MATTERS, INC
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To register: www.InstitutePL.org

BOARD TRACK: Fundraising Leadership

FOR NONPROFIT BOARD LEADERS

Be Informed & Intentional

TUITION

\$1200 for two board members + executive director for all three sessions.
(\$1500 for three board members)

DATES

All sessions meet from
8:00 am to 10:30 am

March 11, 2015
CULTURES

April 15, 2015
CONSTITUENCIES

May 20, 2015
CHALLENGES

LOCATION

Foundation for
The Carolinas

“The best boards are at the very heart of the institutions that they govern. They nurture, provide an ethical weathervane and serve as a trustee of the community good.”

— JIM NORVELL

Assuming a leadership position on a nonprofit board requires a clear understanding of nonprofit CULTURE, CONSTITUENTS, and CHALLENGES... especially when it comes to two inextricable topics: *mission and money*.

The three morning sessions will help you become a more informed and thoughtful board leader by showing you how fundraising is both art and science that requires a dynamic and unique strategy for each nonprofit organization.

Education sessions will incorporate interactive activities to help you assess your particular situation and lead philanthropic strategies for your organization.

CULTURES, CONSTITUENCIES, CHALLENGES

- Learn how to become an extraordinary board member and leader
- Understand the leadership roles and responsibilities of board members vs. staff
- Explore what motivates donors to give, give again, or stop giving
- Dive into the theory and practice of fundraising methods: what works, what doesn't
- Assess how revenue streams can create a synergistic platform
- Raise more money with best practices

AUDIENCE

Geared to board members who are currently in a leadership position, or who have leadership aspirations. It is preferable for two (or more) board members to sign up from the same organization and attend all three sessions together.

Your organization's executive director will be invited for the first hour of each session. Enrollment is limited to 30 board members (or about 15 organizations).



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LEADERSHIP GIFT SCHOOL: Cohort V

FOR CEOs AND DEVELOPMENT DIRECTORS

Nonprofit CEOs and Development Directors are invited as a team, to attend this highly valued education program in Charlotte NC. Eight sessions, over a period of eight months, offer a unique experience to build highly trained teams who can effectively advance the way fundraising is implemented. This is the first theory to practice classroom program in the country, tailored to raise the bar of regional philanthropy.

As a member of this peer learning community, you will discover what it takes to build and grow the most successful philanthropy program possible for your unique organization. Throughout the eight sessions, you will hear from experts and donors, review the field research, read the professional literature, examine case-studies, and participate in class and out-of-class assignments to ensure the effective implementation of LGS principles.

Over the last four years, 92 nonprofit leaders from 43 nonprofit organizations have graduated from this highly acclaimed program, evaluated by an independent UNCC study.

Don't miss this opportunity to apply to be a member of the next cohort of LEADERSHIP GIFT SCHOOL.

BEST PRACTICES: MOTIVATIONS, METHODS, METRICS

- Increase individual giving and reduce dependency on corporate support
- Design/implement leadership gift strategies unique to each organization
- Create funding opportunities that will attract major gifts: 10,000 to 1M range
- Improve understanding of donor psychology and philanthropic behavior
- Develop relationships with donors/grantors that result in long-term funding
- Increase board involvement in philanthropic advocacy & action
- Expand responsibility for ethical fundraising, beyond the development office
- Make major/leadership gift development a top priority of the organization

AUDIENCE

CEOs and Development Directors are both required to participate in all sessions. Board members are invited to attend two afternoon sessions. Information sessions to be held in May. Applications are required to ensure a diverse group of nonprofits that are prepared to implement the established practices.

Build a Culture of Philanthropy

TUITION

\$5,000 for executive director & development director
(\$5,500 for three team members)

DATES

All sessions meet from 8:00 am to 4:00 pm

September 18, 2015
October 16, 2015
November 13, 2015
January 15, 2016
February 19, 2016
March 18, 2016
April 15, 2016
May 13, 2016

LOCATION

Uptown Charlotte

“At Leadership Gift School, we aspire to inspire: to teach you how to be a champion of philanthropic values, how motivate donors to be intentional, and how to have significant community impact.”

— KARLA A. WILLIAMS



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ALUMNI TRACK: LGS Advanced Learning

FOR LGS ALUMNI FROM COHORTS I, II, III, & IV

Be Innovative & Thoughtful

TUITION

Register for one, more, or all four.
\$400 each or \$1200 for all four sessions

DATES

All sessions meet from
1:00 pm to 5:00 pm

April 22, 2015
TRENDS

June 24, 2015
MOTIVATIONS

September 23, 2015
BOARDS

November 18, 2015
ENVIRONMENTS

LOCATIONS

ASC, United Way of
Central Carolinas, FFTC,
Catholic Diocese of
Charlotte

“... philanthropic
innovation is not just
about creating some-
thing new. It also means
applying new thinking
to old problems, pro-
cesses and systems.”

- LAURA ARRILLAGA-ANDREESSEN

LGS alumni know well the importance of learning from other nonprofit leaders who represent diverse organizations, views, and experiences. Sharing knowledge and exploring ideas in an educational environment not only stimulates innovation, it creates unique collaborations.

Karla A. Williams will facilitate Alumni Track: LGS Advanced Learning 2015 which is designed to enlighten and educate participants on current issues and future challenges. As always, each topic/session will be grounded in the latest field and scholarly research tied to real-life case applications.

TRENDS, MOTIVATIONS, BOARDS, ENVIRONMENTS

- Join your colleagues to explore and discuss the latest fundraising trends
- Analyze how your programs are tracking with best practices
- Continue to learn about and adapt to new/different donors
- Strengthen your case for support for each donor type
- Revamp your cultivation strategies for each donor level
- Test new methods of engaging board members
- Discover how a Legacy Program inspires major donors, in different ways
- Take a deeper dive into the process of building a philanthropic culture

AUDIENCE

Nonprofit leaders who have graduated from Leadership Gift School are eligible to enroll in this program, individually, or as part of the CEO/DOD team. CEU credits for CFRE application.



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Testimonials

FROM GRADUATES OF LEADERSHIP GIFT SCHOOL 2010-2014

In a recent survey conducted by UNC Charlotte's Urban Institute, graduates of Leadership Gift School were asked "What 3 things are you doing differently as a result of your participation in Leadership Gift School?"

- Our board members decided to hold an annual retreat focused on development.
- We ask board members to make thank you calls and write thank you notes to donors.
- We developed a major gift giving society that has grown to 25 members.
- Our Board members developed a report card where they make a commitment each year to raise a certain amount of funds; to attend specific fundraising events and to develop relationships with specific donors.
- We created a Major Gift Chair position on our board.
- The Board sets an annual goal for board giving.
- Board President and staff member meets 1:1 with each board member to discuss their contribution.
- Develop a major gifts fundraising plan.
- Personal visits to major donors by the Executive Director, Development Manager and a board member.

EXECUTIVE DIRECTOR - TESTIMONIAL

Before Leadership Gift School, our organization was known as the "land of the \$25 gift." Since then we've been able to capitalize on our newfound knowledge of philanthropy to grow the number of donors and the size of gifts and strengthen the fundraising efforts of our board. A few of our accomplishments include:

- We increased the number of individual donors by 7% in one year FY2011 to FY 2012
- **Contributions made by individual donors increased 18%** in a single year.
- Our FY2012 goal to cultivate 25 new major donors at or above the \$5,000 level (excluding event sponsors) while sustaining our current donors at this level resulted in the addition of 33 new major donors at or above the \$5,000 level in FY2012.

EXECUTIVE DIRECTOR - TESTIMONIAL

Here are a few highlights of what we've accomplished since we graduated from Leadership Gift School in May:

- We began sending quarterly impact letters to our major donors.
- We sent our first Planned Giving brochures a couple weeks ago and immediately received a \$5,000 donation from one of the recipients of the mailing.
- We've done a much better job of engaging our board in development. **Board giving has increased from just over \$17,000 during 2009-10 to pledges of nearly \$80,000 in 2012-13.**

CHIEF DEVELOPMENT OFFICER - TESTIMONIAL

"The time our Executive Director spends with major donors has increased by about 75% since Leadership Gift School. Today, our executive director and I still spend one Friday morning a month focused *only* on Major Gifts, something we started because of the class. Moreover, our Board Development Committee and Executive Leadership are much more actively engaged in major donor cultivation and stewardship."



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Leadership Gift School Graduates 2010-2014

43 organizations
(93 individuals)
have participated
in Leadership Gift
School

ARTS AND CULTURE

Bechtler Museum of Modern Art
Blumenthal Performing Arts
Carolina Raptor Center
Charlotte Ballet
Charlotte Symphony
Children's Theatre of Charlotte
Community School of the Arts
Daniel Stowe Botanical Garden
Harvey B. Gantt Center
McColl Center for Visual Art*
Mint Museum

EDUCATION

Cannon School
Charlotte Latin
John Crosland School
Johnson C. Smith University*
Queens University of Charlotte
Trinity Episcopal
UNC Charlotte - College of Art
& Architecture
UNC Charlotte - College of Health
& Human Services
UNC Charlotte - Murrey Atkins
Library

HEALTH

Care Ring
Hospice & Palliative Care
of Charlotte
InReach

HUMAN SERVICES

A Child's Place*

American Red Cross
Big Brothers/Big Sisters
Charlotte Rescue Mission
Communities in Schools
Council for Children's Rights
Crisis Assistance Ministry
Girls Scouts Hornet's Nest
Habitat Charlotte
Men's Shelter of Charlotte
Mental Health Association
Pat's Place
Safe Alliance
United Way of Central Carolinas
Urban Ministry Center
YWCA

OTHER

Catawba Lands Conservancy*

Foundation For The Carolinas
Humane Society of Charlotte
Jewish Federation of Greater Charlotte

Names in **BOLD are **ENCORE**
participants who have enrolled for
the second time*



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