

## Major gifts for schools – sharpening your skills and measuring success

Thursday 30 November 2017  
Caledonian Club, London SW1

Timing	Content	Speaker
10.00	Coffee and registration	
10.30	<b>Introduction and objectives</b>	IDPE
10.35	<p><b>The nuts and bolts of major giving: An overview of methodologies</b> The first session will look at gift cycles, timelines and methods for each step in the major gift pipeline. What does each step mean? Who should be involved? How long does it take?</p> <p>This session will include several role-playing opportunities for qualification visits.</p>	Victoria Barthram, Chris Massi and Patrick Mulvihill
11.45	Coffee/tea break	
12.00	<p><b>The prospect cycle</b> The second session is focused on understanding your donor in the cultivation stage. What does a discussion look like? We look at how to engage your prospects, and creating your own timelines and tracking systems.</p> <p>This session will also include a look at how GDPR affects prospect research for independent schools and include role-playing for cultivation visits.</p>	Victoria Barthram, Chris Massi and Patrick Mulvihill
13.00	Lunch	
13.45	<p><b>Putting theory into practice</b> The third session invites you to draw up a plan for one of your major gift prospects and to present the plan to the group for discussion.</p> <p>This session includes role-playing for the solicitation stage.</p>	Victoria Barthram, Chris Massi and Patrick Mulvihill
14.55	Coffee/tea break	
15.15	<p><b>Measuring success</b> The day will close by looking at toolkits for measuring success, drawing on examples from throughout the day to create your own assessment tool using several different templates.</p>	Victoria Barthram, Chris Massi and Patrick Mulvihill
16.00	Close	

