



CU Denver Advancement Campaign Workshop

AGENDA

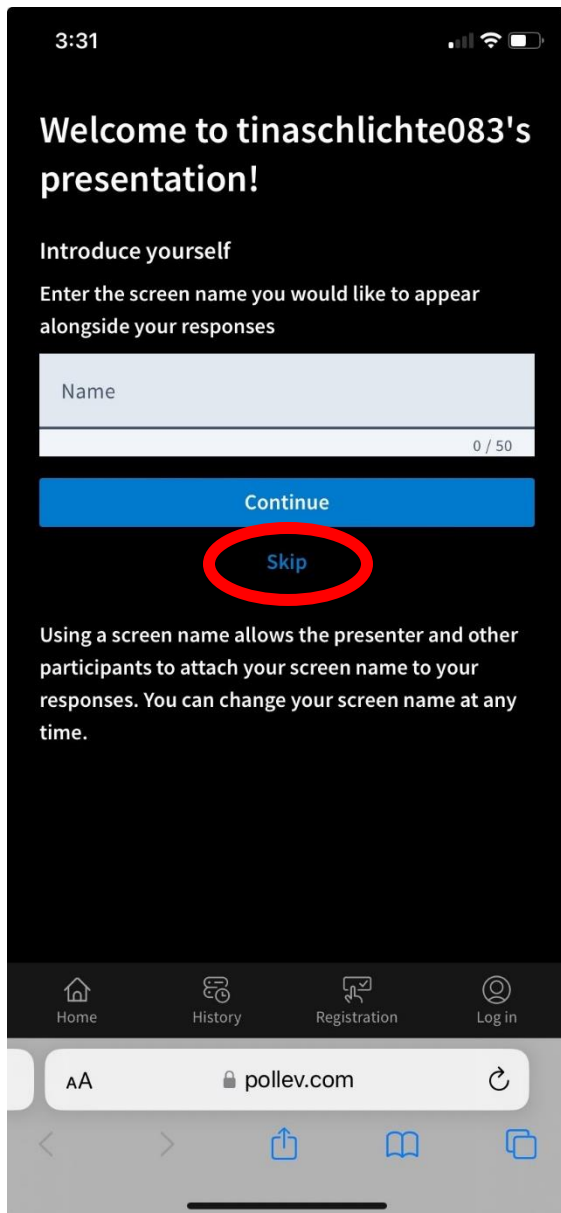
1:00pm	Welcome & Introductions
1:15pm	What is Advancement?
1:35pm	What is a Comprehensive Campaign?
1:50pm	Donor Continuum – Relationship Development
2:05pm	Creating an Elevator Pitch – Telling Your Story
2:20pm	Advancement Resources
2:45pm	Next Steps

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ACTIVITY #1: TWO TRUTHS & A LIE – AN INTERACTIVE POLL

Scan the QR Code below to join the poll group.

Note: You will be taken to a sign in page. Choose the **SKIP** button (pictured below) to join. Answers will be anonymous.



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ACTIVITY #2: CASE & DISCUSSION WORK

Your table will be assigned one of the Case Examples below. Discuss your assigned Case as a group, using the Discussion Questions as a guide. You will be asked to share your findings to the larger group!

Case Example #1: IDENTIFICATION

Dr. Martinez maintains regular contact with Alex Johnson (former student and now alumnus) through email and invitations to department events. She also engages with Alex on LinkedIn, sharing updates about departmental achievements and opportunities for alumni involvement.

Dr. Martinez sees a LinkedIn update where Alex mentions he has recently been promoted. The promotion includes a new project he is leading that involves significant funding for environmental education and conservation. Dr. Martinez notes Alex's enthusiasm and growing influence in the field.

Discussion Questions:

1. How can Dr. Martinez identify whether Alex might be a good prospect for a major gift?
2. What steps should Dr. Martinez take to involve the Advancement office in exploring this opportunity?
3. How can Dr. Martinez deepen the relationship with Alex?

Case Example #2: CULTIVATION

Dr. John Miller, a faculty member, has been engaging with an alumnus who recently expressed interest in supporting a new research initiative. The alumnus has attended several department events and has been in regular contact with Dr. Miller, but no formal request for support has been made yet.

Discussion Questions:

1. What actions can Dr. Miller take to further cultivate the relationship with the alumnus?
2. How can Dr. Miller collaborate with the advancement office to ensure the alumnus is appropriately engaged and informed?
3. What are some potential next steps to move the alumnus closer to making a gift?

Case Example #3: SOLICITATION

Dr. Emily Carter, a professor, has been working closely with a major donor on a project that aligns with the donor's interests. The donor has indicated they are ready to make a significant contribution, but Dr. Carter feels uncomfortable directly asking for a specific amount.

Discussion Questions:

1. How can Dr. Carter approach the solicitation in a way that aligns with the donor's interests and feels comfortable for both parties?
2. What role should the advancement office play in the solicitation process?
3. How can Dr. Carter ensure that the solicitation is strategic and effective without jeopardizing the relationship?

Case Example #4: STEWARDSHIP

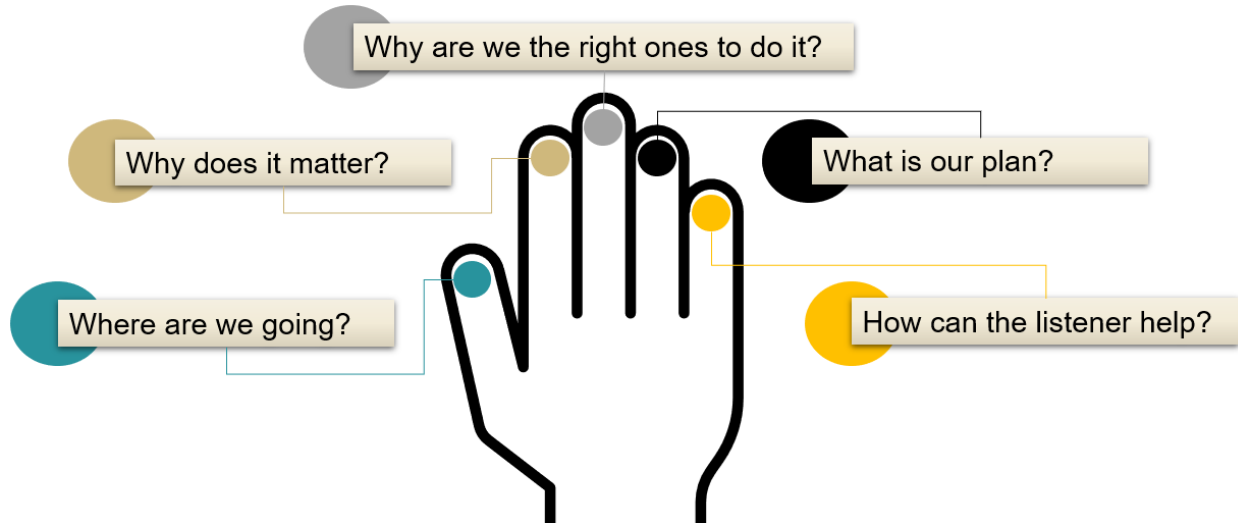
Dr. Sarah Lee, a faculty member, recently received a large donation from a donor who is passionate about entrepreneurship. The donation is funding a new program, and Dr. Lee wants to ensure the donor feels appreciated and remains engaged in the program's success.

Discussion Questions:

1. What steps can Dr. Lee take to steward this donor and maintain a long-term relationship?
2. How can the impact of the donor's gift be communicated effectively?
3. What ongoing opportunities for engagement can Dr. Lee offer to the donor to keep them invested in the program?

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5 FINGER MESSAGING



Hunt (2012)

Hunt, P.C. (2012) *Development for academic leaders: A practical guide for fundraising success*. New York: John Wiley & Sons.

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ACTIVITY #3: STORY TELLING WITH 5 FINGER MESSAGING

For this activity, discuss at your table how you can use 5 Finger Messaging to tell your own story. Refer to the example below to help you along. We will ask for volunteers to share to the larger group!

“As an equity serving institution with a diverse student body, The First Generation and Multicultural (FaM) Business Program at the Business School equips our students with cutting-edge skills and hands-on experience, turning them into future leaders and innovators. By supporting this program, you invest in a vibrant, inclusive talent pool that will drive meaningful change. Join us in shaping a more equitable and dynamic tomorrow.”

Where are we going?

'shaping a more equitable and dynamic tomorrow'

Why does it matter?

'this program develops an inclusive talent pool that will drive meaningful change'

Why are we the right ones to do it?

'as an equity serving institution with a diverse student body'

What is our plan?

'equips our students with cutting-edge skills and hands-on experience'

How can the listener help?

'by supporting this program...'



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KEY TAKEAWAYS

Advancement Definitions & Functions:

- ✓ **Prospect Research:** Process of identifying and evaluating potential donors to assess their ability and willingness to contribute.
- ✓ **Alumni Relations:** Engaging with alumni to foster a strong network.
- ✓ **Fundraising/Major Gifts:** Strategies for securing financial support.
- ✓ **Planned Giving:** Planned giving is arranging future donations, often through a will or financial plan.
- ✓ **Annual Giving / Crowdfunding:** Ways people raise money regularly or for special projects by asking for smaller donations from many supporters.
- ✓ **Industry & Foundation Relations:** Building partnerships with businesses and grant-giving organizations to secure support and funding.
- ✓ **Donor Stewardship:** Maintaining and strengthening relationships with donors to encourage continued support.
- ✓ **Strategic Communications:** Promoting the university's achievements and initiatives.
- ✓ **Event Planning & Execution**

Comprehensive Campaign:

- ✓ Understanding the phases and expected impacts.
- ✓ Importance of each phase in achieving the campaign's goals.

Relationship Development:

- ✓ **Identification:** Finding potential donors.
- ✓ **Cultivation:** Building relationships.
- ✓ **Solicitation:** Making the case for support.
- ✓ **Stewardship:** Maintaining and deepening relationships.

Elevator Pitch Development:

- ✓ Focus on clarity, emotional connection, and impact.
- ✓ Use the \$1 million scenario to think big and articulate your vision.
- ✓ 5 Finger Method:
 - Where are we going?
 - Why does it matter?
 - Why are we the right ones to do it?
 - What is our plan?
 - How can the listener help?

Upcoming Steps:

- Workshop Surveys
- Follow Up Email
- Spring Workshops