



Global Philanthropy Consulting Courses for Groups & 1-on-1 Private Coaching

- Template for Creating Collaborative Funds with Local Funders
- Development Theory Matrix: Maximize Your Presence and Fundraising Capacity
- Template for Creating Multi-year Strategic Alliances by using Program Partners, Cause-related Marketing, Corporate Sponsorship and Media.
- 12-month Visibility Planning Grid
- Three-year Visibility Plan (= Development + Communications + Building Strategic Partnerships)
- The Healthy [Diversified] Development Plan Teaching Module → 24-pages
 1. Development Theory Matrix
 2. Most Common Development Sources
 3. What Makes a Foundation Great, *Advances*, Issue 4, 1999.
 4. Foundations Types
 5. How to Make Friends with Foundations
 6. 10 Ways to Engage Foundations & to Build a Symbiotic Partnership
 7. 10 Types of Funder-Grantee Relationships: “The Good, The Bad & The Ugly”
 8. Before Soliciting a Foundation: Instructions & Foundation Solicitation Script
 9. Foundation Prospecting
 10. Creating the Comprehensive Development Plan
 - A. Stage One – Projecting Revenue and Development Sources Based on Past Successes
 - B. Stage Two - 12 Easy Steps (separate handout)
 - C. Stage Three: Calculating Fundraising/Communications Costs Worksheet
 11. How to Define and Describe a Program and Its Impact - EVALUATION
 12. Program Costs Worksheet
 13. Next Best Thing to a Development Consultant: Professional Development
- The Communications, Marketing, and Media Plan Teaching Module → three-pages
 1. Visibility Pyramid
 2. Visibility Outcomes
 3. Communications: Establishing Your Program’s Identity
 4. Media: Influencing Opinion Leaders
- Prospect Research and Tracking Form
- Sponsorship: Corporate and Cause-related Marketing
- Understanding the Anatomy of A Special Event → four-pages
- Assessing an Organization → three-pages
- Cause-related Marketing Teaching Module → three-pages
- Surviving Site Visits
- Seven Rules of Successful Fundraising (developed by a second party)