

THE WHITESTONE GROUP

Fundraising Counsel to Outstanding Organizations



Offering Nonprofit Fundraising Classes Through

TEXAS CHRISTIAN UNIVERSITY

Office of Extended Education

Winter – Spring 2014

www.lifelong.tcu.edu

Bill McLeRoy, CFRE, Instructor

Join us for these very convenient, reasonably priced fundraising courses. They are designed specifically for you if you are a nonprofit trustee, executive director, or development officer. Consistently given high participant satisfaction scores, these courses can help you open doors to philanthropic funding through planned gifts, major gifts, capital campaigns, feasibility studies, and grants from private foundations.

January 29 Don't Have a Planned Giving Program? Build One!

The planned giving acronyms you hear--CLAT, CRUT, CLUT, CGA, and IRA—give you a headache just thinking about them. How, you wonder, can I ever have a planned giving program at my organization? Where do I start?

Learn how you can begin your program—and see it really thrive! The class shows you:

- The reasons for starting your planned giving program now.
- The benefits of a program for your institution.
- 13 simple steps for beginning a program.
- Marketing and communication strategies to build planned gift support.
- Online and media resources to support your new program.

Wednesday, 6:30-8:30 p.m. **2 hours TCU #14SNPD16**

February 12 The Campaign Feasibility Study: What, Why, How, When, and How Much

The session taps actual feasibility study experience from multi-million dollar private school, arts, and healthcare campaigns. Participants can learn when studies should or should not be conducted, what studies can and can't accomplish, how long they should take, and how to:

- Map the decision-making process for considering a study.
- Invite and evaluate proposals from consulting firms offering to conduct these studies.
- Prepare the organization's staff and directors for a study.
- Measure the study's cost against results.
- Use the study process to cultivate major and lead donors.

Wednesday, 6:30-8:30 p.m. **2 hours TCU #14SNPD11**

February 26 Mystery to Reality: The Capital Campaign

The successful capital campaign not only raises dollars for facilities or endowment, it can also build donor relationships, boost annual giving, increase enrollment or membership, and prepare an institution for future challenges. Participants will:

- Review the basic elements of a successful capital initiative: the case, volunteer leadership, and availability of resources.
- See the impact of challenge grants.
- Explore a campaign with competing priorities to fund a chapel, stadium, financial aid, athletic fields, and a new high school.

The session taps experience of campaigns for private schools, the arts, and healthcare from \$500,000 to \$100,000,000.

Wednesday, 6:30-8:30 p.m.) **2 hours TCU #14SNPD13**

March 19 Heart and Soul: Becoming Philanthropic Partners with Your Major Gift Donors

In today's rough economy, major donors are carefully choosing what they will give and which organizations will yield the best results with their gifts. In this class, participants will discover what major donors seek today from organizations they support, and how their institutions can engage donors and their families as lifetime partners. This session examines:

- What major donors seek today from those whom they support.
- How trustees, executives, and development officers can engage major donors and their families as lifetime partners with an institution.
- Major donors' changing values and their philanthropic tools, including donor advised funds, securities, land, estate plans, and other assets.

Wednesday, 6:30-8:30 p.m. **2 hours TCU #14SNPD14**

April 9, 16, 23 The Successful Search for Private Foundation Grants

This three-session course is ideal for new grant-seekers, experienced professionals, and nonprofit executives and directors. In lively, interactive sessions, participants will explore:

- Why do foundations make grants?
- What are trends in foundation grant-making?
- How do grant seekers research foundations?
- How are relationships strengthened with foundations?
- How do you visit foundations and host foundation site visits?
- What are the essentials of successful grant proposals?
- How can nonprofit executives, directors, and trustees be part of the grant-seeking process?

Participants will use foundation information on the Internet, review actual grant proposal preparation, and much more.

Three consecutive Wednesday evenings, 6:30-9:00 p.m. **7.5 hours TCU #14SNPD02**

For more information about these and other TCU Extended Education classes and to sign up for those in which you are interested, see www.lifelong.tcu.edu.

About Bill McLeRoy, CFRE

Bill is Senior Principal of The Whitestone Group and is a Certified Fundraising Executive. He has assisted clients and their donors in creating significant gifts of more than \$40,000,000 with cash, stock, real estate, and other assets, either as current contributions or through their estate plans or life income agreements.

He has a wealth of successful fundraising experience spanning more than 27 years, including strategic planning, capital campaigns, major and leadership gifts, planned giving, and feasibility studies for nonprofits in the Southwest engaged in multi-million dollar initiatives. Bill is a frequent speaker for professional organizations, webinars, and national and regional conferences.

He also has served as a director or trustee of nonprofit organizations, a regional bank, professional associations, and foundation boards. Bill is currently a director of the Rotary Club of Western Fort Worth Foundation, a member of the Lone Star Council of the Partnership for Philanthropic Planning, and a member of the Association of Fundraising Professionals.

He and his family give to many charitable causes, including endowed scholarships, endowed lectures, annual operations, and capital projects. Bill is Mayor Pro Tem of the City of Aledo, Texas, and Treasurer of the Aledo Economic Development Corporation.