



5BC Presents: Focus on Fundraising Series

The FOF Series is a cohort-based program focused on fund development series focused on growing an organization's individual giving program, planning a successful annual fundraising program including a year-end campaign, developing a simple major gifts program, identifying opportunities for securing legacy gifts, and ensuring fundraising work is equitable and inclusive. This training is facilitated by Katie Davis of 5 Branches Consulting LLC.

Cohort Series Goals:

- A well-developed annual fundraising plan and focused fundraising campaign strategies.
- Supporting fundraising leaders in prioritizing and leveraging assets and opportunities.
- Deepening fundraising work alongside peers.
- A "toolkit" of resources and templates.
- One-on-one deep dive fundraising consulting opportunities with instructor to ensure work is integrated into the organization.

About Katie Davis (She/Her/Hers)

5 Branches Consulting was founded by Katie Davis in 2011 emerging from a desire to support capacity building needs across multiple nonprofit sectors. She currently resides near Salida, Colorado but spent nearly a decade (2011-2020) in the Pacific Northwest living in Bend and Portland, Oregon and Port Townsend and Bainbridge Island Washington.

Katie has over twenty years' experience in systems and process improvement, fundraising and strategic visioning. Katie holds a certificate in Nonprofit Management and is a Society for Human Resources (SHRM-CP) certified professional. She has dedicated her entire career to helping organizations and businesses across multiple sectors achieve impact while remaining resilient during challenging times. From the smallest of nonprofits to large businesses and corporations, Katie's unique approach to achieving organizational effectiveness - developing a collective strategy, achieving financial success, establishing equitable and inclusive management processes and policies, and developing and supporting collective leadership - means she can hold the larger vision while breaking down processes into achievable and incremental steps. Katie brings a level of play and humor to problem solving and planning reflected in her unique facilitation agendas.

Katie sits on multiple boards both nationally and internationally. She spends her free time exploring the mountains of Colorado and serving her community as a local elected member of the town council.

**Education:**

- Society For Human Resources Certified Professional (SHRM-CP)
- Certificate of Nonprofit Management from University of Washington
- Master of Science, Recreation, Parks and Tourism Administration, Western Illinois University
- Bachelor of Science, Biology and Sociology, Principia College

Cohort Size:

- Maximum 10 organizations
- Teams of 2 welcome to join for additional fee (staff, board, key volunteers)

Program Dates/Times:

- Tuesdays 4:00pm-5:30pm
- 1/23, 2/6, 2/20, 3/5, 3/19

Location and Cost:

- Sessions are 90 minutes and will be held **IN PERSON and VIRTUALLY**
- Chaffee, Lake, and Fremont County Organizations - \$325 per person (add a second person from the organization for \$100)
 - The fee includes one 60-minute confidential consulting session with 5 Branches Consulting on any Executive Director topic/need.
- Out of Area Price - \$425 per person (add second person from organization for \$100)

Session Descriptions:**Session 1: Fundraising plans that work.**

Learn strategies that help you to move away from donor centered fundraising when determining fundraising priorities. Create a simple and useful fundraising plan that can be used as a road map for your organization.

Session 2: Developing Gifts for the Future of Your Organization – Legacy and Major Gifts.

Learn about the potential of legacy gifts and the options for types of gifts. Find out how to identify potential legacy donors and cultivate legacy gifts and major gifts and what infrastructure you need to have in place.

Session 3: Year End Fundraising Program Planning.

Make your year-end campaigns stand out. We'll discuss how to set realistic fundraising goals, develop a compelling appeal, and opportunities for focused segmentation of your donor data.



Session 4: Building and Broadening Your Individual Giving Program.

Your annual fund is, for many organizations, the greatest source of precious unrestricted dollars. It's also a key source for mid-level and major donors. In this session we'll share the components of a comprehensive annual fund program and how to get more people to give more money, more often.

Session 5: Maximize Online Fundraising.

Explore the potential for on-line giving. Discover what makes an effective website donation page and evaluate your website donation page.

For more information or to register please contact

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