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## Section I – Program Overview

### 1.1 Highlights of the *AFP Donor Retention: A Self-Assessment Workshop*

#### A. Program Objectives

Following the *AFP Donor Retention: A Self-Assessment Workshop* participants will be better able to:

- Identify effective practices to retain and upgrade your donors to improve fundraising effectiveness
- Prepare a donor retention plan for your organization
- Use data from growth-in-giving reports to develop growth-related fundraising strategies

#### B. Workshop Content

The *AFP Donor Retention: A Self-Assessment Workshop* is based on data collected via the Fundraising Effectiveness Project. Its purpose is to show nonprofits the value of tracking overall gains and losses in gifts and donors – then how to use that information to develop cultivation strategies to improve donor retention.

The focus of this workshop is on developing a donor retention plan based on what research indicates really works.

Topics covered include:

- Why organizations lose donors and money
- How keeping donors increases fundraising success
- Determining the effectiveness of fundraising efforts through use of the FEP Fundraising Fitness Test
- Developing a successful donor retention plan

The workshop curriculum is presented through lecture, a fictional case study based on real data, and the encouragement of participant dialogue. Printed participant manuals and faculty materials are ordered by the chapter for distribution to faculty members and participants.

#### C. Audience

The *AFP Donor Retention: A Self-Assessment Workshop* is designed for fundraising professionals at the intermediate to advanced level who have responsibility for donor cultivation. This may include executive directors, vice presidents for development, program managers, and leadership volunteers. We recommend that the person responsible for data tracking attend the workshop with the fundraising practitioner.

Course attendance might vary from 20 to 40, or more participants. If more than 40, you may need to plan on audio support, with microphones.

#### D. Length

The *AFP Donor Retention: A Self-Assessment Workshop* is an 8-hour workshop. A sample agenda for trainer use and distribution to participants can be found on page 14.

## 1.2 Basic Information



### AFP Donor Retention: A Self-Assessment Workshop

The ***AFP Donor Retention: A Self-Assessment Workshop*** is available for all AFP chapters to offer to members. The workshop is based on data collected via the Fundraising Effectiveness Project. The annual survey indicates that nonprofits are losing nearly as many donors and gifts as they gain each year.

The 8-hour workshop includes small group work on a fictional case study based on real data, making the learning experience both substantive and enjoyable. The focus of this workshop is on developing a donor retention plan based on what research indicates really works. It shows the value of tracking overall gains and losses in gifts and donors – and then using that information to develop cultivation strategies to improve donor retention.

Full participation in the ***AFP Donor Retention: A Self-Assessment Workshop*** is applicable for **8.0 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

#### Topics covered include:

- Why organizations lose donors and money
- How keeping donors increases fundraising success
- Determining the effectiveness of fundraising efforts
- Developing a successful donor retention plan

#### Who Should Attend?

The ***AFP Donor Retention: A Self-Assessment Workshop*** is designed for fundraising professionals at the intermediate to advanced level who have responsibility for donor cultivation.

For more information on hosting the Workshop in your chapter, please email [AFPInternationalConference@afpnet.org](mailto:AFPInternationalConference@afpnet.org).

### 1.3 Instructor-Level Information

Speakers are selected by the chapter based on their knowledge of donor retention issues, familiarity with the Fundraising Effectiveness Project concepts, and demonstrated presentation skills (as evidenced by previous speaker ratings or observation). Each faculty member must be knowledgeable about the Fundraising Effectiveness Project concepts; attendance and careful observation at a previous AFP Donor Retention: A Self-Assessment Workshop (or Planning to Keep Your Donors Workshop) is preferred.

A list of individuals who have graduated from AFP's Faculty Training Academy (FTA) is available from the AFP IHQ. FTA graduates have been trained in adult learning theory and teaching techniques.

It is suggested that a member of one of the participating FEP donor software firms be paired with a fundraising professional to facilitate the workshop. For a list of individuals from donor software firms who are willing to participate, contact Cathlene Williams, PhD, at [cathlenewilliams@cox.net](mailto:cathlenewilliams@cox.net), or you may contact your local office of one of the participating firms.

ALSO, PLEASE NOTE: All facilitators for the AFP Donor Retention Workshop will be expected to complete a mandatory facilitator's training webinar located at this link: <http://videos.afpfc.com/DRWebinar>. So, please forward this information to the facilitators whom you have recruited to conduct the workshop. And ask each to confirm to you when they have completed it.

### **CFRE Points – CFRE Credit & Tracking?**

**Every time an AFP Chapter offers any AFP International courses, it is the Chapter's responsibility to submit to CFRE International to get it approved.** Though the Association of Fundraising Professionals overall is a member, individual AFP Chapters need to complete the Approved Provider Application. This includes your Chapter. You can do this at the CFRE International Website.

Breadcrumbs: [www.cfre.org](http://www.cfre.org) → Bar across top → **Education** → **Becoming An Approved Provider** → (Note that near the bottom of the page it states that "The Provider fee is waived for our Participation Organisations and their chapters." This includes the Association of Fundraising Professionals) → **Approved Provider Application**

Complete and submit the Approved Provider Application. Under "Fees," click on the button in front of the statement that reads "No Fee – Participating Organisation"

This should resolve it; but if you encounter any problems or have further questions not answered on their Web pages, follow through with the **CONTACT US** at the top line, far right of the page, and then to **Continuing Education** (1 571 699 0602).

A related subject, that frequently comes up involves the individual fundraising professional who is tracking CFRE Credits year 'round, who is asking whether there is easy way to track the credits they take each year to maintain CFRE status.

Each course a person took would have an individual CE tracker or certificate (like the AFP classroom courses - e.g., AFP CFRE Refresher Course) if it is eligible for credit. Individuals can then keep track of her own credits by adding them to their online application at [www.cfre.org](http://www.cfre.org). So, essentially, such tracking is done with CFRE International,

Regarding how CFRE Points are measured, per CFRE International and the CFRE Application:  
1 point for each hour spent ***attending*** educational conference sessions or workshops. 2 points for each hour spent ***teaching*** educational conference sessions or workshops using ***previously developed material***. 3 points for each hour spent teaching educational conference sessions or workshops using newly developed material. The teaching can't be part of the applicant's regular job duties, however.

Specific to the AFP Core Classroom Courses, which chapters host:

- AFP Fundamentals of Fundraising Course is 16.0 education credits,
- AFP CFRE Refresher Course is 8 points if taught in 8 hours or 16 points of continuing education CFRE credit if taught over 16 hours with more time for facilitated discussion.
- AFP Donor Retention Workshop is worth 8 points of CFRE education credit.

So, Chapter tracking of CFRE points is done directly with CFRE International and not through AFP. Also, each faculty member should track their own credits by adding them to their online application at [www.cfre.org](http://www.cfre.org). However, AFP IHQ does record the names of the faculty as well as the number of hours teaching by way of the Class Agenda, which the Site Coordinator provides to AFP, and which AFP retains for the record, should it be requested by CFRE International. Again, see the Agenda templates below.

## Section II – Administrative Information

### 2.1 Administrative Guidelines

The following information highlights and clarifies significant administrative policies, procedures, and implementation guidelines as they pertain to the *AFP Donor Retention: A Self-Assessment Workshop*. They are designed to assist course hosts with the delivery of the workshop and will remain in effect until the workshop is revised or a future administrative policy or procedure that supersedes them is released.

The goals of the implementation process are to:

- Orient instructors and instructor trainers to the *AFP Donor Retention: A Self-Assessment Workshop*;
- Prepare instructors and instructor trainers to conduct the *AFP Donor Retention: A Self-Assessment Workshop*;
- Standardize instructional content and methodology so that all instructors are conducting the workshop in a consistently uniform manner;
- Help the workshop hosts understand and implement their duties.

#### A. Workshop Contracting Options and Pricing Guidelines

**Option A: Joint Venture.** The base registration fee for workshop participants is \$60 for AFP members and \$120 for nonmembers. From this, the AFP International Headquarters receives \$30/member and \$60/nonmember. The workshop hosts may choose to charge a fee higher than the base fee to subsidize the registration fee for some participants (charging less than \$60) or to cover food or other costs (such as hotel room for out of town faculty). In this case, AFP IHQ still receives \$30/member and \$60/nonmember.

**Option B: AFP Member Franchise Fee.** The AFP host pays AFP International Headquarters a base fee of \$350 for *one-time* use of the workshop, plus \$18 per participant. The AFP host may choose to charge the base registration fee or a fee higher or lower than the base fee.

**Option C: Non-AFP Member Third Party Fee:** The non-AFP member third party pays AFP International Headquarters a base fee of \$600 for *one-time* use of the workshop, plus \$18 per participant. The non-AFP third party host may choose to charge the base registration fee or a fee higher or lower than the base fee.

Please note that all fees and invoices are in U.S. dollars.

<i>AFP Donor Retention: A Self-Assessment Workshop</i>	<b>Option A: Joint Venture*</b>	<b>Option B: AFP Member Franchise Fee</b>	<b>Option C: Non- AFP Member Third Party Franchise Fee</b>
	\$60 AFP member \$120 Nonmember	\$350 plus \$18 per participant	\$600 plus \$18 per participant

The workshop hosts collect and track all registration fees.

## B. Workshop Products

*AFP Donor Retention: A Self-Assessment Workshop* Participant Manual  
*AFP Donor Retention: A Self-Assessment Workshop* Faculty Manual  
Sample data file for use in demonstrating use of the FEP Fundraising Fitness Test  
PowerPoint Slides  
Host Toolkit

## C. Ordering Information

- Complete the workshop host agreement form and return it to AFP IHQ six months (and ideally nine or more months) prior to the workshop date.
- Email your faculty list to AFP CFI - Professional Advancement at least 12 weeks and ideally 6 – 9 or more months prior to the workshop date for faculty materials to be provided. This helps ensure that Faculty receive their Faculty materials in plenty of time to prepare and ensure that this essential element for the workshop is firmly in place.
- Email your nearly final participant list and projected final attendance to CFI-Professional Advancement four weeks prior to the workshop date for participant manuals to be shipped.

Workshop hosts normally will not be charged for shipping & handling. However, if AFP IHQ receives your faculty list less than 12 weeks before the class date, or the participant list less than three weeks before the class date, **an expedited shipping charge will be added to your final invoice.**

Manual orders come from Omnipress in Madison, WI. These orders normally are shipped via UPS Ground within the USA, unless otherwise requested (and paid for). Cannot ship ground to Canada.

**Manuals and related materials shipped to countries other than the United States will incur separate shipping charges.** Please note that to prevent interruptions in Canadian shipments, all packages will be using Omnipress' UPS Non-resident Importer (NRI) program. Only UPS "Worldwide" shipping methods are available. Canadian brokerage fees, are included in all UPS "Worldwide" shipping methods. Fees from duties and taxes will be included.

## D. Where?

The workshop host is responsible for securing a location to hold the course. Some course hosts choose to use hotel meeting rooms; others have a training room or conference room space at no cost.

The workshop host must select and submit the location for the *AFP Donor Retention: A Self-Assessment Workshop* before the date will be listed on the AFP online education schedule. When selecting the location, a workshop host should consider the following:

- The site should be accessible by any participants with a disability (i.e., ramps for wheelchairs; accessible restrooms, etc.)
- The site should be in a central location, with easy access to area highways, etc., and in close proximity to area hotels for out-of-town participants.
- **Room set-up for the course should be set with ROUND TABLES, each for 8-10 people, at the front.** A sign-in table should be set up outside the door to the room, or just inside the room, for easy participant sign in.
- There should be a table at the front of the room for faculty materials.
- **Audio visual requirements for the course include a computer with Internet access, LCD projector, screen, two flip charts with markers and sufficient paper, podium with lectern if**

desired, a 4'-6' table at the front of the room for faculty and participant manuals for the trainer. If class and room size indicates, a sound system with two handheld wireless microphones and possibly a microphone on the lectern.

- Other supplies needed include: blue painter's tape and blank table tents.

## E. Host Responsibilities

- Select a date and confirm a venue six or more months (ideally nine or more months) in advance.
- Complete the agreement contract and submit to the AFP IHQ immediately after a date and venue have been confirmed. Again, this should be six (6) or more months prior to the scheduled start date and ideally nine (9) or months prior.
- Select one person to coordinate details with AFP IHQ.
- Recruit faculty and provide list to AFP IHQ. Order faculty CDs from AHP IHQ to be sent to the workshop hosts 12 or more weeks prior to the workshop. The workshop coordinator is then responsible for dispersing the CDs to the individual faculty members.
- Collect registration fees.
- Arrange for room set up with:
  - Internet access
  - Screen and LCD projector with setup for computer to handle PowerPoint Slides.
  - Round tables (large enough for 8 to 10 people)
  - Small table at the front of the room for instructor manuals and supplies
  - Two flip charts, each with enough paper and markers
  - Sound system with two hand microphones if room size and number of participants warrant it.
- Arrange for snack breaks and meals, if applicable. If donated, cover such costs through the fee.
- Order participant manuals from AFP IHQ 3 weeks prior to workshop.
- Provide copies of the Agenda, participant list, faculty list and participant name badges or name tents.
- Provide an on-site monitor (usually the workshop hosts) to ensure that participants sign in, and to welcome and introduce faculty members.
- Provide AFP IHQ with a financial summary (including number of AFP members and nonmembers in attendance) and a final participant roster upon completion of the program.
- Return unused participant manuals and **ALL** the faculty CDs to AFP IHQ at the end of the workshop.

**NOTE:** Signed Host Agreement Forms, and other documents should be sent, and Faculty CD's, Participant Manuals should be ordered through Professional Development at AFP International Headquarters. Please contact Professional Development at [JHendrickson@afpnet.org](mailto:JHendrickson@afpnet.org) /703-519-8465 or [proadv@afpnet.org](mailto:proadv@afpnet.org) / 703-519-8494 for more information. The manuals may arrive from Omnipress, located in Madison, WI.

## F. AFP International Headquarters Responsibilities

- Post the workshop information on the AFP website.
- Contact the workshop hosts for the faculty list (immediately after receiving the agreement; follow-up if needed) and participant list (at least 3 weeks prior to the workshop) in order to send faculty materials and participant manuals.
- Invoice workshop hosts at the close of the workshop. Payment is due once the workshop is completed and the financial summary and other materials are received from the hosts.



### 2.3 Sample Budget for Option A: Joint Venture (based on 20 participants)

#### Income

Registration income @ \$60 x 20 participants	<u>\$1,200</u>	
<b>TOTAL INCOME</b>		<b>\$1,200</b>

#### Expenses

Marketing materials (email brochure)	0	
<i>AFP Donor Retention: A Self-Assessment Workshop</i> fee to AFP IHQ		
@ \$30 x 20 participants	\$600	
Meeting room fees @ \$200 x 1/2 day	\$100	
Breaks @ \$10 per person x 20 persons	<u>\$200</u>	
<b>TOTAL EXPENSES</b>		<b>\$900</b>

**Net Income** **\$300**

**NOTE:** Budgets will vary according to attendee (member/non-member), meeting space and food costs in your area.

### 2.4 Sample Budget for Option B: Franchise Fee (based on 30 participants)

#### Income

Registration income @ \$60 x 30 participants	<u>\$1,800</u>	
<b>TOTAL INCOME</b>		<b>\$1,800</b>

#### Expenses

Marketing materials (email brochure)	0	
<i>AFP Donor Retention: A Self-Assessment Workshop</i> fee to AFP IHQ		
@ \$350 plus \$18 x 30 participants	\$890	
Meeting room fees @ \$200 x 1/2 day	\$100	
Breaks @ \$10 per person x 30 persons	<u>\$300</u>	
<b>TOTAL EXPENSES</b>		<b>\$1,290</b>

**Net Income** **\$ 510**

**NOTE:** Budgets will vary according to attendee (member/non-member), meeting space and food costs in your area, as well as whether you are covering hotel costs for faculty from out of town. All figures are in U.S. dollars.

## 2.5 Planning Tips

Assign one person to act as a liaison with the AFP International Headquarters. You will also need an on-site program monitor to act as host during the event. (This may be the same person in both instances.)

In developing your own promotional materials, please forward to the AFP IHQ a draft of your promotional brochure and other related materials for review prior to printing/distribution.

Arrange for meal functions and beverage service in close proximity to the meeting room used for the workshop.

If the *AFP Donor Retention: A Self-Assessment Workshop* is being offered as part of a conference where other sessions will be held, you may want to prepare specially marked badges for workshop attendees (e.g., badges printed on different colored paper or bearing colored dots) as a means of assuring that only workshop attendees receive workshop materials.

**Scholarships:** It may be helpful to create a scholarship fund to support individuals who, for financial reasons, may be unable to attend the *AFP Donor Retention: A Self-Assessment Workshop*. Scholarships are not offered through the AFP International Headquarters. Scholarships would come out of the workshop hosts' budget or through a local area partner.

The first sources for scholarship funding may well be the networks used to promote the *AFP Donor Retention: A Self-Assessment Workshop*. These networks may be willing to sponsor the attendance of a number of employees from their own organizations. Requests to United Way, the state arts council and other state departments, as well as faith-based groups may generate funds for scholarships.

Another source for scholarship funds is local foundations or corporations. These funding sources often have a strong interest in providing technical assistance to encourage the fundraising capabilities of nonprofit organizations.

## 2.6 Recruiting Faculty for the AFP Donor Retention: A Self-Assessment Workshop

Faculty for the *AFP Donor Retention: A Self-Assessment Workshop* are selected by the chapter.

- Each faculty member must be knowledgeable about the Fundraising Effectiveness Project concepts, and must have demonstrated presentation skills (as evidenced by previous speaker ratings or observation).
- A list of individuals who have graduated from AFP's Faculty Training Academy (FTA) is available from AFP IHQ through Cathlene Williams at [cathlenewilliams@afpnet.org](mailto:cathlenewilliams@afpnet.org). FTA graduates have been trained in adult learning theory and teaching techniques. These individuals are willing to serve as instructors and as resources to your *AFP Donor Retention: A Self-Assessment Workshop* faculty members. They are also available by phone to offer suggestions on how to select good instructors. Travel and lodging expenses for these individuals are the responsibility of the chapter.
- It is suggested that a member of one of the participating FEP donor software firms be paired with a fundraising professional to facilitate the workshop. For a list of individuals from donor software firms who are willing to participate, contact Cathlene Williams at [cathlenewilliams@afpnet.org](mailto:cathlenewilliams@afpnet.org), or you may contact your local office of one of the participating firms.
- In selecting faculty members, please strive for diversity in gender, ethnicity and organizational type.
- Recruit faculty members and provide them with Faculty materials at least 6-8 weeks prior to the workshop to give them plenty of time to prepare.

## 2.7 Marketing the *AFP Donor Retention: A Self-Assessment Workshop*

It is recommended that a local planning committee be established to promote the *AFP Donor Retention: A Self-Assessment Workshop*. In addition to sponsoring the workshop with other AFP chapters, it can also be effective to create a partnership with other local chapters of related organizations (such as ALDE chapters, local Planned Giving Councils, AHP regions, etc.) or other local service providers such as the United Way, the Voluntary Action Center or Support Center, a continuing education program within an institution of higher education, etc.

### Targeting the Market

The marketing effort begins as soon as a signed contract (Host Agreement) is forwarded to the AFP International Headquarters. Marketing this program is very much like marketing the fundraising effort for an institution. First, the general markets must be targeted, then specific prospects within each market must be identified.

#### Primary markets are:

- members of area AFP chapters who have 5 or more years of experience;
- attendees of past AFP chapter programs;
- fundraising professionals in your chapter's area who are not currently members of AFP, but may be on a prospect list.

#### Additional markets include:

- advocacy organizations;
- arts, cultural and historical organizations;
- educational institutions including private, parochial, alternative and public schools and colleges and universities;
- environmental groups;
- health and human service organizations;
- religious groups, synagogues and churches;
- United Way agencies.

### Marketing Strategies

After the prospects have been identified, the planning committee must develop appropriate marketing strategies. The planning committee should also brainstorm local networks that might be useful to help promote the program.

#### 1. Developing promotional materials

- Sample language for *AFP Donor Retention: A Self-Assessment Workshop* fliers can be found in this packet, along with camera-ready art for a self-mailer, with space to insert the dates and location of your program.
- **Remember:** materials should be targeted to the needs of your audience. You can brainstorm effective promotional messages and then test them with likely audiences before going to print.
- If you have a local individual who has attended the *AFP Donor Retention: A Self-Assessment Workshop* in the past, ask this individual to provide testimonial for use in promotional materials.

#### 2. Using local networks

An important marketing strategy is to secure endorsements of networks to which your members may belong. These networks may be able to provide promotional support. For example, make

arrangements with a network leader to direct a personalized email to members. The email can recommend attendance at the *AFP Donor Retention: A Self-Assessment Workshop*. The hosting chapter should provide a draft email and information on how to register.

Local networks might include:

- Faith-based groups, e.g., regional, state, provincial, national religious bodies for the denomination, including outreach groups of those denominational bodies;
- state agencies/departments with subgrantees including the state council on the arts and humanities; departments of health, elderly affairs and human services;
- United Way and the United Way Management Assistance Program (MAP)

### 3. Ensuring personal follow-up

Even after local networks have been used and the promotional materials released, it may be necessary to do personal follow-up to prospective participants in order to ensure maximum attendance.

Targeted prospects within each market should receive a telephone call. A script of key points to cover in the telephone call can be developed by the planning committee. Members of the planning committee as well as the AFP chapter Board of Directors should be assigned to call the prospects they know best.

## 2.8 Onsite Checklist for AFP Donor Retention: A Self-Assessment Workshop

- ✗ On the day of the *AFP Donor Retention: A Self-Assessment Workshop*, arrive an hour early. Check that room set-up is correct. (tables, chairs, Internet access, computer with PowerPoints and sample data files, LCD projector, screen, flipchart(s), table for presenter in front of room, and sign-in table, **also handheld microphones if size of room or number of participants merits the use.**)
- ✗ Place sign-in sheet, participant roster, and participant manuals on sign-in desk. Lay out name badges and/or name tents - alpha by last name makes it easy to find participants' names. Have blank badges/tents and markers ready for on-site registrants.
- ✗ Lay out faculty name badges.
- ✗ Set out any AFP promotional materials.
- ✗ As participants arrive, give them their name badge and/or tent, manual, and participant list.
- ✗ **Important:** Have participants sign a sign-in sheet.
- ✗ Any unregistered participants should complete an on-site registration form and sign in on the sign-in sheet. On-site registrants may pay on-site by check or credit card depending on how the chapter is able to collect money.
- ✗ As faculty members arrive, give them their name badges. Have someone to assist them setting up.
- ✗ At the designated starting time, begin the *AFP Donor Retention: A Self-Assessment Workshop* by introducing the faculty members.
- ✗ Announce when breaks begin and end, and where food or beverages are being served.
- ✗ At the end of the workshop, publicly thank the faculty members. Thank participants for coming and remind them to complete the online evaluation form within the next few days.
- ✗ E-mail to AFP IHQ the final registration list (with number of AFP members and nonmembers registered) and a scanned copy of the Sign-In sheet.
- ✗ Prepare materials for shipment back to the AFP IHQ within 5 days of the workshop. Be sure to return all of the unused participant manuals.

Congratulations and thank you! Your *AFP Donor Retention: A Self-Assessment Workshop* is completed!

## 2.9 Agenda – To provide to each participant

- Edit to date, city and state, also Venue.
- Insert Names of Instructors for each Section

***AFP Donor Retention: A Self-Assessment Workshop***  
***Month Day, 2018***  
***City, State***

<b>Venue: Building, Street Address, Location within building</b>	<b>INSTRUCTOR</b>
8:00-8:20 a.m.	Introduction plus Opening Activity
8:20-8:40 a.m.	Section 1: <b>Why Organizations Lose Donors and Money</b>
8:40-9:10 a.m.	Section 2: <b>How Keeping Donors Increases Fundraising Success</b>
9:10-9:40 a.m.	Section 3: <b>Measuring the Effectiveness of Your Fundraising Efforts</b>
9:40-9:55 a.m.	<i>Break</i>
9:55-10:55 a.m.	Case Study: Part 1: <b>Kirkwood Child Development Center</b>
10:55-11:25 a.m.	Case Study: Part 2: <b>Kirkwood Child Development Center</b>
11:25-12:05 p.m.	Section 4: <b>Developing a Successful Donor Retention Plan</b>
12:05-1:00 p.m.	<i>Lunch Break (on your own)</i>
1:00- 3:30 p.m.	Case Study: Part 3: <b>Kirkwood Child Development Center</b>
3:30- 3:45 p.m.	<i>Break</i>
3:45- 5:15 p.m.	Section 5: <b>Review and Apply What You've Learned</b>
5:15 -5:30 p.m.	<i>Conclusion</i>

*Note: clock times are approximate and based on the longest amount of time allocated for each section in the faculty notes. Specific timing may vary based on the group.*

**CFRE Credit** – Full participation in the ***AFP Donor Retention: A Self-Assessment Workshop*** is applicable for **8.0 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

**Evaluation** – Upon completion of the workshop, Participants are encouraged to complete the AFP workshop evaluation.

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## The *AFP Donor Retention: A Self-Assessment Workshop*

The *AFP Donor Retention: A Self-Assessment Workshop* is based on data collected via the AFP Fundraising Effectiveness Project. Its purpose is to show nonprofits the value of tracking overall gains and losses in gifts and donors – then how to use that information to develop cultivation strategies to improve donor retention.

The focus of this workshop:

**How to develop an effective Donor Retention Plan' based on what research indicates really works.**

Topics covered include:

- Why organizations lose donors and money
- How keeping donors increases fundraising success
- Determining the effectiveness of fundraising efforts through use of the FEP Fundraising Fitness Test
- Developing a successful donor retention plan

The workshop curriculum is presented through lecture, a fictional **case study** based on **real** data, and the encouragement of participant dialogue. Each participant receives a printed manual both for use during the workshop, and as a tool for launching their organization's own effective Donor Retention Plan.

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## Workshop Location and Cost Information

For more information on AFP's educational programs, contact the Professional Development Division, AFP, 4300 Wilson Blvd., Suite 300, Arlington, VA 22203. Phone: 800/666-FUND ext. 494 or 465; Fax: 703/684-0540; E-mail: [JHendrickson@afpnet.org](mailto:JHendrickson@afpnet.org) or [proadv@afpnet.org](mailto:proadv@afpnet.org)

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## Workshop Registration Form

Location and Date: \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_

Membership I.D. #: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Payment for the *AFP Donor Retention: A Self-Assessment Workshop* must accompany this form.

Check Enclosed

Visa/MasterCard/American Express

Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please send payment to:  
[chapter contact information]

***AFP Donor Retention: A Self-Assessment Workshop Faculty Recommendation Form***

Whom would you recommend to serve as faculty for the workshop?

<b>Full name(s)</b>	<b>Organization (s)</b>	<b>Street Address</b>	<b>City/State/Zip City/Province/Postal Code</b>



## **ASSOCIATION OF FUNDRAISING PROFESSIONALS**

### ***AFP Donor Retention: A Self-Assessment Workshop Agreement 2018***

The ***AFP Donor Retention: A Self-Assessment Workshop*** is an **8-hour** workshop based on data collected via the Fundraising Effectiveness Project. Its purpose is to show non-pro AFP Donor Retention: A Self-Assessment Workshop fits the value of tracking overall gains and losses in gifts and donors – then how to use that information to develop cultivation strategies to improve donor retention. The focus of this workshop is on developing a donor retention plan based on what research indicates really works. The workshop curriculum is presented through lecture, a fictional case study based on real data, and the encouragement of participant dialogue.

The suggested fees for the ***AFP Donor Retention: A Self-Assessment Workshop*** for 2018 are \$60 AFP members and \$120 nonmembers. The workshop host(s) may change the registration fees but the financial arrangements that follow remain the same.

- **Workshop Host definition: Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) who is going to host the workshop after agreeing to the Authorized Provider requirements.**

#### **Financial Arrangements**

All expenses related to the workshop (meeting room, meals, breaks, faculty travel expenses, faculty gifts) will be paid by the workshop host(s). The host(s) may charge registrants a fee higher than the normal fee if extra funds are needed to cover expenses related to supplementary meals or functions (e.g., a special reception, full breakfast, exhibit hall, etc.). Materials being shipped to Mexico or Canada will incur separate shipping fees. Payments to AFP IHQ are in U.S. dollars.

This course includes faculty materials and sign-in sheets. You will not be charged for unused participant manuals, which are returned to AFP IHQ at the close of the workshop.

**Option A: Joint Venture** - Can be offered in conjunction with AFP IHQ by any sponsoring entity.

The workshop host(s) will collect the registration fees, and will reimburse AFP IHQ \$30 member/\$60 non-member per participant. This course includes faculty materials, sign-in sheets, and participant manuals.

**Option B: AFP Member Franchise Fee** - Can only be offered by an AFP Chapter and/or an AFP Business Member, to include Endorser and Executive Circle Business Members

The franchise fee is \$350 per one-time use of the ***AFP Donor Retention: A Self-Assessment Workshop***. The workshop host(s) will collect all registration fees. The host(s) will payout \$350 plus \$18 per participant.

**Option C: Non-AFP Member Third-Party Franchise Fee** – Can be offered by a non-AFP Chapter or Non-Business Member

The third-party franchise fee is \$600 per one-time use of the ***AFP Donor Retention: A Self-Assessment Workshop***. The workshop host(s) will collect all registration fees. The host(s) will payout \$600 plus \$18 per participant.

#### **Course Host(s) Responsibilities:**

- Completing, signing and submitting the Agreement Form six or more months prior to the planned start date.
- Providing on the Agreement Form a street address and not a PO Box for the shipment of CD's, manuals, certificates, etc. (shipments to you will come either UPS or FedEx; and neither can deliver to a PO Box)
- Selecting faculty
- Providing list of faculty with their credentials as soon as possible but by 12 weeks prior to class date.
- Registering participants; collecting registration fees
- Selecting a meeting facility and making on-site food and beverage arrangements
- Marketing the program
- Designating an on-site coordinator to greet participants, introduce faculty, and handle other on-site logistics

- Dispersing faculty materials to individual faculty once materials are received from AFP IHQ and ensuring all faculty know they **MUST** return materials to Host/site coordinator by day they teach
- Requesting participant materials five or more weeks (or at least four) prior to class date
- Ensuring all room set up requirements are met, including use of round tables, flipcharts as well as sound system with hand held microphones if appropriate for number of participants and room size.
- Returning **all** unused course materials to AFP IHQ
- Returning **all** non-disclosure forms to AFP IHQ

#### **AFP IHQ Responsibilities:**

- Reviewing faculty
- Providing workshop materials to host(s) (faculty and participant manuals, non-disclosure agreement, sign-in sheets)

\*Please see the *Host Toolkit— AFP Donor Retention: A Self-Assessment Workshop* for more detailed information on the responsibilities of AFP IHQ and the workshop host(s).

#### **Intellectual Property (IP) - Authorized Provider**

An Authorized Provider is a workshop host - Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) that has a signed Authorized Provider Agreement with AFP IHQ to provide AFP instructional programs in accordance with the standards and objectives of the program they desire to teach. An approved Authorized Provider Agreement must be on file with AFP IHQ before you can host AFP IHQ courses. There is no fee, except where noted, to become an Authorized Provider. Becoming an Authorized Provider permits you to offer the specific AFP course on a one-time basis. Each time you wish to host an AFP course, you must sign on to another Authorized Provider and Course Agreement. As an Authorized Provider, you adhere to the fact that offering this workshop and/or any of the content within the workshop without previously signing a Course Agreement with AFP IHQ is against AFP IHQ standards and ethical codes. AFP IHQ has the official rights to this workshop and has the right to refuse your agreement due to instances that would/have broken the authorized provider regulations.

By signing this agreement, you agree to offer this workshop as an Authorized Provider and therefore adhere to the above statement.

**IMPORTANT NOTE: BEFORE PLANNING THIS WORKSHOP, PLEASE MAKE SURE YOU HAVE REVIEWED THE COMPLETE 2017 HOST TOOLKIT— AFP DONOR RETENTION: A SELF-ASSESSMENT WORKSHOP.**



## ***AFP Donor Retention: A Self-Assessment Workshop Host Agreement Form***

I hereby acknowledge that I understand the following:

1. That workshop materials provided in the *AFP Donor Retention: A Self-Assessment Workshop* faculty materials re the exclusive property of the Association of Fundraising Professionals (AFP).
2. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, “intellectual property” shall mean: all trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains, as well as any other intellectual property right protected by law.
3. The workshop materials are the exclusive property of AFP and are protected by federal copyright law. They are for **one-time use** of faculty members for purposes of teaching the *AFP Donor Retention: A Self-Assessment Workshop*; all Faculty materials must be returned to AFP IHQ; and they, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the written permission of AFP IHQ.

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Print Name

Signature

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Course Location

Date

Please sign and return this form to:  
AFP, Professional Development  
4300 Wilson Blvd., Suite 300  
Arlington, VA 22203  
[JHendrickson@afpnet.org](mailto:JHendrickson@afpnet.org)  
or [proadv@afpnet.org](mailto:proadv@afpnet.org)

## ***AFP Donor Retention: A Self-Assessment Workshop Standards and Guidelines for Faculty***

As an *AFP Donor Retention: A Self-Assessment Workshop* instructor, I agree to:

- deliver the workshop content as it is presented in the faculty manual. I understand that, time permitting, I may make a personal observation so long as I clearly state it is my own opinion and not that of AFP. If I am unable or unwilling to facilitate this course as it appears in this manual, I will withdraw from any faculty assignments affected.
- use the faculty materials only for an authorized, contracted *AFP Donor Retention: A Self-Assessment Workshop*. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, “intellectual property” shall mean: all trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains, as well as any other intellectual property right protected by law. The workshop materials are the exclusive property of AFP and are protected by federal copyright law. They, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the written permission of AFP.
- avoid any appearance of commercialism. I understand that this program is an educational event, not a sales or marketing platform. I agree that my presentation will be an objective review of the topic on which I am presenting, and will not contain any content that is a sales or promotional pitch for any specific product(s), service(s) or company(ies), including my own, particularly those that may compete with AFP.
- refrain from making any statements contrary to the best interests of AFP.

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Print Name

Signature

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Date

Please sign and return this form to:  
AFP, Professional Development  
4300 Wilson Blvd., Suite 300  
Arlington, VA 22203  
[JHendrickson@afpnet.org](mailto:JHendrickson@afpnet.org)  
or [proadv@afpnet.org](mailto:proadv@afpnet.org)