



# The Art of Bold Asking®

## *Creating High Performance Teams*

**We elevate philanthropy by creating effective partnerships and building new skills that drive giving from transactional to transformational.**

Vision Philanthropy Group is a full-service, comprehensive philanthropic consulting firm. Our team has partnered with organizations to raise **over \$1 billion over four decades** as staff and as counsel. Our counsel is based on decades of deep experience, serving as development professionals and consultants in premier nonprofits, academic institutions, and hospitals. **We understand** the unique challenges you face in generating support for fundraising, building your donor base, capital campaigns, endowments, new initiatives, unrestricted funds, and underfunded programs.

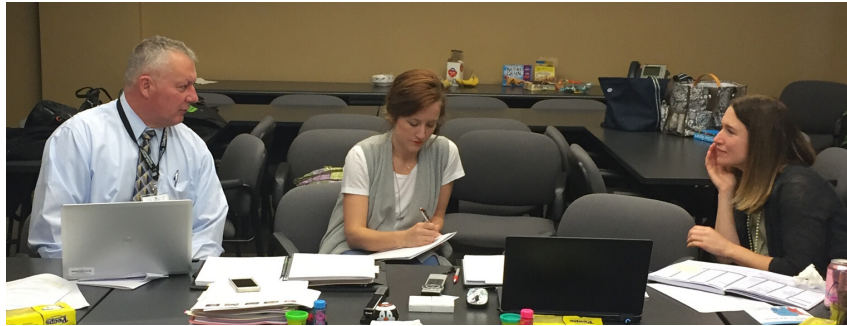
Our consulting team has worked closely with influential philanthropists and boards, innovative leaders, world-renowned faculty and fundraising institutions of all sizes. **We've learned what works and what doesn't.** We know how to build and engage an effective team. We guide our clients through leading and advising **high-performing philanthropy programs**, tailoring each to meet your specific requirements and unique culture. The VPG team has deep experience, in the trenches and as counsel to complex organizations and small shops.

*"VPG has provided our organization with key coaching in strategic conversations with current and prospective donors, helping us transform our fear of "asking" into bold enthusiasm at the opportunity to forge philanthropic partnerships. The guidance provided by VPG has been incredibly impactful and we look forward to continuing to work with them to grow our fundraising efforts to new heights of excellence."*

*April Bragg, Ph.D., former Vice President for Research Advancement, Centerstone Research Institute*

## Real Life Experience. Practical Help

Based on decades of experience across the U.S., Europe and South America, VPG's Bold Asking® workshops, retreats, small group trainings, and personalized one-on-one coaching program is for your entire team, board members, CEOs, executive staff and development staff. Developed at the request of our clients, Bold Asking® meets the needs of today's non-profit community. **We have been where you are now.** We quickly assess your strengths, challenges and opportunities and tailor a philanthropy-training program to meet your needs and enhance your organization's philanthropic culture and fundraising performance.



### The Art of **Bold Asking®**

Our program is designed to build the team's confidence, comfort and effectiveness in creating **transformational philanthropy**. We share the most effective practices of high performing philanthropy organizations that are engaging new donors and constituents and elevating giving.

**Our training program offers a suite of customized training, education, coaching, and learning experiences for:**

Board Members  
CEOs  
Executive teams  
Development staff

**Our customized and highly interactive program includes:**

Retreats and workshops (3 hours to day-long)  
Small group training  
Structured one-on-one personalized coaching

*"Susan's expertise in knowing how to tell a cause's story and understanding what makes donors tick helped us create the partnerships with donors we needed...Her insight and work with our Board of Overseers was critical to not only reaching but exceeding our campaign goals."*

***Orrin Ingram, CEO, Ingram Industries and Chairman, Vanderbilt-Ingram Cancer Center Board of Overseers, Nashville, TN***

Coaching and training designed for your entire team:  
**Board Members, Executives and Development Staff.**

*Here's how it works:*  
**Assessment**



First, Vision Philanthropy Group consultants interview your leaders and staff to **understand your organization** and its situation. Then, we tailor an online survey to your unique circumstances to assess your philanthropic culture and understand your team's comfort, fundraising competencies, perceptions and experiences in philanthropy and fundraising.

We ask that all participants, board members, executives, and development staff participate in the simple 10-question survey. The information gleaned informs the training design and provides helpful feedback for our clients.

You may take VPG's **Bold Asking**<sup>®</sup> sample assessment surveys at no cost.  
We will share tips based on your survey!

**Assessing Your Board's Readiness to Be Philanthropy Leaders**

<https://www.surveymonkey.com/r/BWH9MHZ>

**Creating a Powerful Philanthropy Partnership with your CEO/Executive Director**

<https://www.surveymonkey.com/r/HLRJ7XB>

**Measuring Your Organization's Philanthropic Culture**

<https://www.surveymonkey.com/r/PRCVC8T>

# Customized Workshops and Retreats



Bold Asking® workshops and retreats are **customized, interactive** experiences. Whether the audience is your board, CEO, executive team and/or development staff, these programs focus on developing new skills and tools needed to effectively partner together to comfortably communicate the organization's vision and stories, build donor relationships, drive more meaningful giving, and boldly close gifts. These interactive learning experiences also enhance and support your organization's annual capital, endowment and comprehensive campaign activities. Most importantly, our goal is to elevate transformational giving.

## Curated learning experiences and interactive workshop topics include:

- *Principles of the psychology of giving: Secrets to creating powerful partnerships*
- *The role of gratitude, happiness, and meaningful experiences in philanthropy*
- *Measuring your philanthropic culture: Steps to creating a culture of meaning and philanthropy*
- *Building partnerships with the team, from the CEO and board to staff*
- *Starting effective donor conversations: The Board, CEO and staff roles*
- *Creating your "Signature Language"*
- *Active listening: From the fundamentals to advanced*
- *The "Three Magical Questions"*
- *Power Up Your Story-telling with Passion: What Works and Why – Telling your Story*
- *Establishing a culture of meaningful giving: everyone's unique role*
- Best practices for elevating performance and engagement of your team
- Small group breakout exercises, toolkits, scripts, and role playing

Retreats usually occur off-site from the organization over a full day, including lunch and breaks. They may be combined with board retreats. Workshops typically occur on-site at the organization and require a minimum of 3 hours. They may also be conducted in conjunction with a board retreat.

# Small Group Training



Frequently, learning occurs best in small groups. Bold Asking® coaching may be delivered through a combination of workshops and small group sessions that are customized to the clients needs. These education and training experiences give your development team, board members, and leaders the tools they need to create high performing teams.

## **For the Development Staff, structured, small group coaching topics include:**

- Key concepts, strategies and tactics that maximize your performance
- Steps for building sustained volunteer engagement in your program
- Tactics for building effective partnerships across the organization
- Creating and sustaining partnerships with the CEO and board members
- Creating a prospect portfolio and best practices in managing
- Tools that support donor conversations:
  - *Getting the meeting*
  - *Effective cultivation approaches that work*
  - *Pre-solicitation conversations: getting the prospect ready to say yes!*
  - *Solicitation language: closing the gift and who closes*
- Small group exercises
- Role-playing and toolkits

**Board, C-suite, and executive team small group training is tailored to your unique circumstances and needs.**

*"Thanks to VPG's leadership, guidance and campaign counsel we are better equipped to have a successful Endowment Campaign. The Bold Asking® Workshop and subsequent Lunch 'n Learn, were instrumental in preparing our Board and staff to build relationships and make the "bold" ask...We made a wise investment when we collaborated with Vision Philanthropy on our campaign and training."*

***Pam Bryant, President and CEO, United Way of Williamson County***

# Personalized One-on-One and Executive Coaching



Other times, VPG consultants work one-on-one with development staff, CEOs or other executives to **optimize our client's results and build meaningful philanthropy**. With the client, we develop a customized plan with identified benchmarks and outcomes. VPG consultants have extensive experience providing one-on-one and executive coaching for CEOs, board chairs, and development staff whose performance will all benefit from our specialized training.

One-on-one coaching reinforces the training program and ensures that optimal results are consistently practiced. Coaching typically augments our workshops or small group training and is frequently delivered in once or twice monthly meetings in person or by phone for a period of time.

Contact us to learn more about our personalized coaching!

*"The presentations and interactive discussions gave us confidence in understanding how and when to effectively share our story with community leaders who could support BrightStone. It was a game-changer to learn how to build relationships that could lead to transformational giving versus transactional giving. With Susan's guidance, we have already experienced record philanthropic investments from both current and new donors. Susan's counsel is an investment worth making."*

**-Randy Elliott, Director of Advancement, BrightStone, Inc., Franklin, TN**

## Organizations the VPG Team Has Served As Development Leaders and Consultants

American Cancer Society,  
Mid-South Division  
Nashville, TN

Beth Israel Deaconess Hospital-Milton  
Boston, MA

BrightStone  
Franklin, TN

Burke Rehabilitation Hospital and  
Research Institute  
White Plains, NY

Case Western Reserve University  
School of Medicine  
Cleveland, OH

Catholic Charities of Tennessee  
Nashville, TN

Centerstone Research Institute  
Nashville, TN

Chilton Medical Center Foundation  
Pompton Plains, NJ

Craig Memorial Hospital  
Craig, CO

Greater New Orleans Foundation  
New Orleans, LA

Hospice of the Chesapeake  
Annapolis, MD

Interfaith Dental Clinic  
Nashville, TN

The Kkumi Project  
Nashville, TN

Massachusetts Eye and Ear Infirmary  
Teaching affiliate of Harvard Medical School  
Boston, MA

McAlester Regional Health Center  
McAlester, OK

Memorial Sloan Kettering Cancer Center  
NYC, NY

Nashville Social Enterprise Alliance  
Nashville, TN

National Jewish Health  
Denver, CO

New England Baptist Hospital  
Boston, MA

Ohio University Heritage College of  
Osteopathic Medicine  
Athens, OH

Our House  
Atlanta, GA

Progressive Health Center and  
Swedish Hospital  
Denver, CO

St. Lo France Etats-Unis Memorial  
St. Lo, France

The Community Foundation of  
Middle Tennessee  
Nashville, TN

The Ohio State University Medical Center  
Columbus, OH

United Way of Metropolitan Nashville  
Nashville, TN

United Way of Williamson County  
Franklin, TN

University at Buffalo Jacobs School  
of Medicine  
Buffalo, NY

Vanderbilt University School of  
Nursing Vanderbilt-Ingram Cancer Center  
Vanderbilt University Medical Center  
Nashville, TN

Vascular Disease Foundation  
Washington, D.C.

Weill Cornell Medical College  
NYC, NY

Williamson Medical Center Foundation  
Franklin, TN

W.O. Smith/Nashville Community  
Music School  
Nashville, TN

World Vision Artists  
Nashville, TN

*"The Bold Asking® training provided precisely what our board members need...The training was customized for our organization and our board. Everyone left the training feeling prepared to use their signature language to help secure the funding we need to advance our mission. I highly recommend the training for both new and experienced board members and development teams."*

***Diane Douglass, VP, Development, Our House, Atlanta, GA***

**For more information, please contact Susan Holt, President and Senior Consultant, [susan@visionphilanthropy.com](mailto:susan@visionphilanthropy.com)**